

NAVEX GLOBAL™  
The Ethics and Compliance Experts

INTEGRILINK CASE MANAGEMENT

# Investigator Guide



IntegrILink Case Management Investigator Guide  
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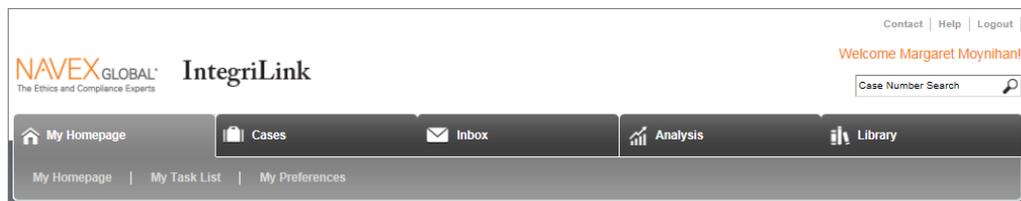
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# 1 Welcome

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Welcome to NAVEX Global's IntegriLink – an enterprise portal for managing your ethics and compliance program.



- **My Homepage** – your starting point for action items, recent activity, and program metrics
- **Cases** – case lists and search tools for managing cases
- **Inbox** – alerts and notices about program activity
- **Analysis** – real-time summary reports and monthly management reports
- **Library** – resources provided by your organization
- **My Profile** – your contact and password information
- **Contact** – NAVEX Global contact information
- **Help** – new release and quick reference materials, user guides

## 1.1 ABOUT THIS USER GUIDE

This user guide is intended for AlertLine® Case Management Investigators–Level 4 users. This user guide provides complete instructions for:

- Navigating IntegriLink
- Managing Your Profile
- Managing Cases

Feature availability is dependent on login rights and setup and is specific to your organization.

- Features associated with optional add-in modules are identified.

## 1.2 INTRODUCTION TO CASE MANAGEMENT

NAVEX Global’s AlertLine® solution integrates hotline service with reporter follow-up, case management, and self-service reporting and analytics for timely and effective program management.

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### 1.2.1 CASE WORKFLOW

- **Initiating a case** – when an employee (“reporter”) reports a concern through the web- or phone-based hotline service, a Workplace Alert Report (WPA Initial Report) is generated. The reporter is given a case number and a PIN, which the reporter can use to follow up on the case.
- The WPA Initial Report is **automatically delivered** to the designated contacts at your organization via email and/or through IntegriLink.
- Contacts who have IntegriLink access can **log on to IntegriLink** to review the case detail, enter notes, and make assignments. The “Unassigned Cases” list is a convenient starting point for managing new cases.
- **Assigning a case** – when assignments are made, the “assignees” are notified by email. The assignees can then view and work with the case online—they can reply to the reporter, enter investigation notes and resolution details, and attach files.
- **Communicating with the reporter** – case managers and investigators can communicate with the reporter through the hotline via the case management service. Replies entered through the case management service are provided to the reporter when the reporter follows up through the web- or phone-based hotline service. The reporter’s follow-up contact with the hotline generates a follow-up report, and the follow-up activity is logged in the case.
- **Case status** can be used to track case progress from initiation, through investigation to resolution. Fields are available for indicating the action taken in response to the case, and the final disposition of the case. A timeline of case updates is tracked in the case history.
- Throughout the investigation, the assigner and assignees are **notified of case activity** through the IntegriLink Inbox and through email. Alerts of priority A allegations, receipt of new information from a reporter, and receipt of translated case information are displayed on the homepage.

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## 2 Getting Started

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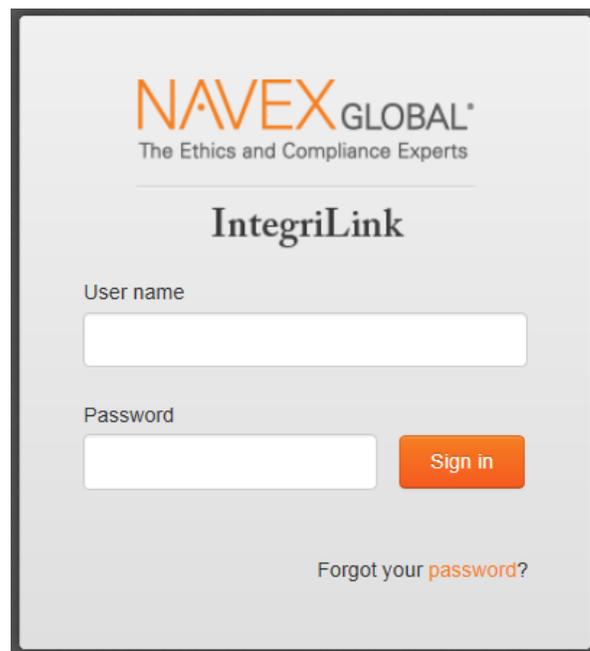
New users receive an email with a username, a temporary password, and instructions for logging on.

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### 2.1.1 LOGGING ON

**To log on to IntegriLink:**

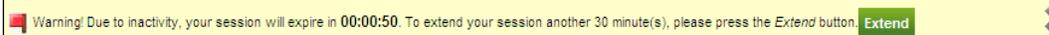
1. Go to [www.myintegrilink.com](http://www.myintegrilink.com).
2. Enter your username (your email address) and password.
3. New users are prompted to create a new password and set a security question the first time they log on.



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### 2.1.2 TIMEOUT PERIOD

For security purposes, IntegriLink sessions time out after 30 minutes of no activity. A warning prompt appears five minutes prior to the timeout. You are required to log on again after a timeout.



**Tip.** To protect the privacy of your information, completely close the browser after logging off.

### 2.1.3 ICONS USED IN INTEGRILINK

Icon	Function or Description
	Add
	Delete
	Edit
	Show Details
	Read More
	Print
	Download to Excel
	Attachment Available
	Follow-up Available
	Active or Complete
	Close Window
	Field Help
	Add case to watchlist

## 3 My Homepage

The homepage is your starting point for integrated insight into program activity and action items.

The screenshot shows the NAVEX Global IntegriLink homepage. At the top, there's a navigation bar with 'My Homepage', 'Cases', 'Inbox', 'Analysis', 'Library', and 'Admin'. Below this, there's a 'Summary Reports' section with a 3D pie chart titled 'CASES BY LOCATION' for 'GC Portal Demo' over the last 180 days. To the left, there's a 'Solutions' section with links for 'Hotline Solutions', 'Online Training', 'Certification & Survey', and 'Advisory Services'. To the right, there's a 'My Alerts' section listing various case status changes. Below that, there's a 'My Watchlist' section with a table of cases. At the bottom right, there's a 'Metrics' section showing program statistics.

Case #	Report Initiated	Allegation	Priority
GCPMT-16-10-0018	2016-10-26	Harassment - Workplace	C
GCPMT-16-10-0016	2016-10-27	Inappropriate Behavior	C
GCPMT-16-10-0015	2016-10-27	Espionage or Sabotage	B
GCPMT-16-10-0013	2016-10-27	Inappropriate Behavior	C
GCPMT-16-10-0009	2016-10-11	Unfair Employment Practices	C

About the Homepage...

- **Solutions** – quick links to frequently used tasks and lists for each solution that your organization has subscribed to, and information about solutions that could enhance your ethics and compliance program
- **My Alerts** – prominent notification of actionable items
- **My Cases** – newest cases
- **My Watchlist** – latest cases on your watchlist
- **Metrics** – automatically calculated program metrics
- **Message from NAVEX Global** – stay up to date on upcoming enhancements, tips for using IntegriLink, etc.

**Tip.** Set your homepage preferences in My Preferences.

## 4 My Task List\*

View, sort, and update the case tasks that you own, and those you have created for other users.

The screenshot shows the 'My Task List' interface. At the top, there are navigation tabs for 'My Homepage', 'Cases', 'Inbox', 'Analysis', and 'Library'. Below these, there are sub-tabs for 'My Homepage', 'My Task List', and 'My Preferences'. The main content area is titled 'My Task List' and includes a search filter 'Show tasks for 365 days' with a 'Go' button. There are 'Delete' and 'Add Task' buttons. A table lists tasks with the following columns: Task Due, Task Status, Task Owner, Task, Case Number, and Case Status. The table contains five rows of task data.

Check All	Task Due	Task Status	Task Owner	Task	Case Number	Case Status
<input type="checkbox"/>	2015-09-14	Not Started	Margaret Moynihan	Interview the witnesses.	GCPMT-15-09-0001	New
<input type="checkbox"/>	2015-08-14	Not Started	Margaret Moynihan	Interview the witnesses.	GCPMT-15-08-0001	Open
<input type="checkbox"/>	2015-07-31	Not Started	Margaret Moynihan	File the regulatory paperwork.	GCPMT-15-06-0006	Open
<input type="checkbox"/>	2015-07-31	Not Started	Margaret Moynihan	File the regulatory paperwork.	GCPMT-15-06-0006	Open
<input type="checkbox"/>	2014-09-01	Unable to Complete	Margaret Moynihan	Upload the files.	GCPMT-13-12-0002	Open

Showing 5 results.

My Task List - available to users who have “Manage Case Tasks” permission

To update a task:

1. Click the edit icon , or click the case number to go to the case.

The screenshot shows the 'Edit Task' dialog box. It contains the following fields and options:

- Task Type:** Case Task
- Case Number:** GCPMT-15-09-0001
- Task:** Interview the witnesses.
- Task Owner:** Margaret Moynihan, Case Invest
- Task Due Date \*:** 2015-09-14 (format: yyyy-mm-dd)
- Task Status:** A dropdown menu with options: Not Started (selected), In Progress, Completed, Unable to Complete, Canceled.

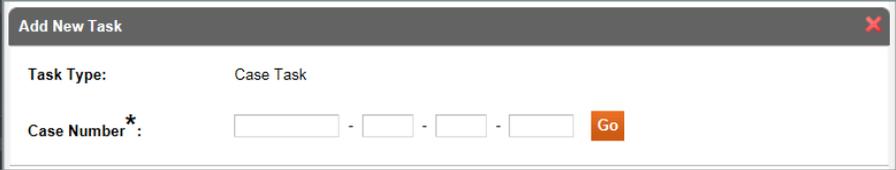
Buttons for 'Cancel' and 'Save' are located at the bottom right of the dialog.

2. You can update the task owner, task due date, and task status.

\* Requires Task Management Add-in.

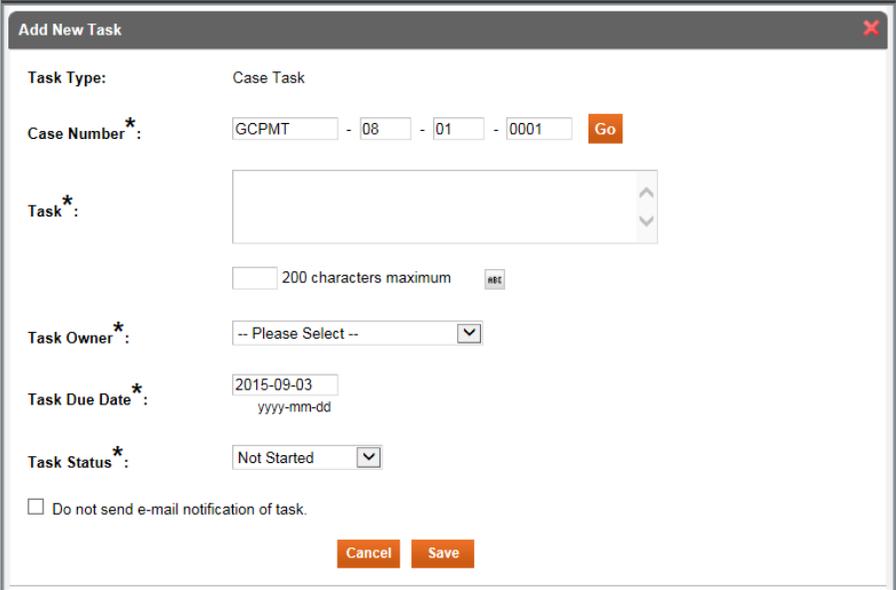
**To add a task:**

1. Click **Add Task**.



The screenshot shows a dialog box titled "Add New Task" with a close button (X) in the top right corner. The "Task Type" is set to "Case Task". The "Case Number" field is empty, followed by a "Go" button.

2. Enter the case number that the task applies to and click **Go**.



The screenshot shows the "Add New Task" dialog box with the following fields filled: "Case Number" is "GCPMT - 08 - 01 - 0001", "Task" is empty, "Task Owner" is "-- Please Select --", "Task Due Date" is "2015-09-03", and "Task Status" is "Not Started". There is a checkbox for "Do not send e-mail notification of task" which is currently unchecked. "Cancel" and "Save" buttons are at the bottom.

3. Enter the task, assign a task owner, and set the task due date and the current task status.
  - o If you do not want an email to be sent to the task owner, select "Do not send email notification of this task."
4. Click **Save**.

## 5 My Preferences



### 5.1 MY CONTACT INFORMATION

1. Select **My Preferences** on the **My Homepage** tab.
2. Click the **My Contact Information** link in the left menu.

3. Update your information, then click **Save**.

### 5.2 MY PASSWORD

1. Select **My Preferences** on the **My Homepage** tab.
2. Click the **My Password** link in the left menu.

3. Enter your current password, enter your new password, confirm (retype) your new password, confirm your security question, then click **Save**.

#### Exception to Password Changes Using My Password Page

If your organization is using the **Gateway**, passwords are managed through it, and you will not be able to change your password using the method above.

## 5.3 MY CASE LIST SETTINGS

Settings are applied to the Case List, Unassigned Cases, and Archived Cases lists available on the Cases tab.

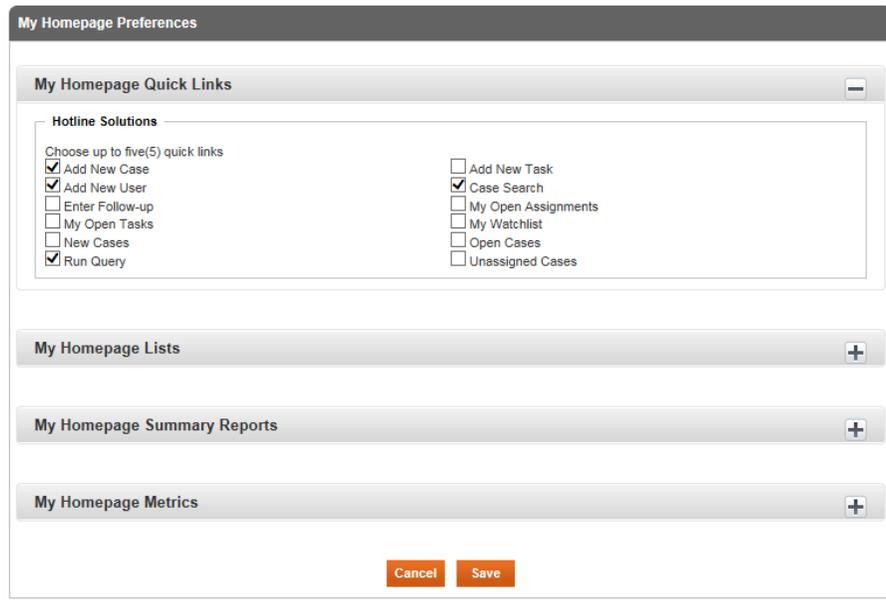
### To change your case list settings:

1. Select **My Preferences** on the **My Homepage** tab.
2. Click the **My Case List Settings** link in the left menu.
3. **Default View** – indicate how many days’ worth of reports to display, and choose a default program, if you have access to multiple programs.

4. **Case List Columns** – choose sorting preferences, columns, column order, and column names. You can set different preferences for each program that you have access to. (Field availability dependent on your program setup.)
5. To rename columns, click the **Edit Column Names** button, make your changes, then click **Save**.
6. To apply your preferences to the Case List, click the **Save** button at the bottom of the settings page.

## 5.4 MY HOMEPAGE

1. Select **My Preferences** on the **My Homepage** tab.
2. Click the **My Homepage** link in the left menu.



The screenshot shows a dialog box titled "My Homepage Preferences". It contains several sections for configuring the user's homepage:

- My Homepage Quick Links:** A section with a minus sign icon. It includes a sub-section "Hotline Solutions" with the instruction "Choose up to five(5) quick links". There are two columns of checkboxes:
  - Left column:  Add New Case,  Add New User,  Enter Follow-up,  My Open Tasks,  New Cases,  Run Query.
  - Right column:  Add New Task,  Case Search,  My Open Assignments,  My Watchlist,  Open Cases,  Unassigned Cases.
- My Homepage Lists:** A section with a plus sign icon.
- My Homepage Summary Reports:** A section with a plus sign icon.
- My Homepage Metrics:** A section with a plus sign icon.

At the bottom of the dialog box, there are two buttons: "Cancel" and "Save".

3. You can choose which quick links appear on the homepage, the number of records to display in homepage lists, and choose which metrics display on the homepage.

## 5.5 MY NOTIFICATIONS\*

Based on settings selected by your IntegriLink administrator, you may have the ability to set your own notification preferences.

### 5.5.1 ABOUT NOTICES, ALERTS AND EMAIL

- Case activity notices and alerts are delivered to the IntegriLink Inbox
- **Notices** are delivered just to the people who are assigned to a case, and to the person who assigned them
- **Alerts** are delivered to all users who have access to a case
- Alerts are notices displayed on the IntegriLink homepage
- Notices and alerts can also be delivered by email
- Case assignments and task assignments are delivered by email



**To set your notification preferences:**

1. Select **My Preferences** on the **My Homepage** tab.
2. Click the **My Notifications** link in the left menu.
3. Select a program. The settings selected by your IntegriLink administrator are displayed.
4. Select the activities that you want to be notified of, and indicate how you want to be notified:

**Notice** – select “Notice” to have the notice displayed in the IntegriLink Inbox.

**Alert** – select “Alert” to have the alert displayed on the IntegriLink homepage as well as in the IntegriLink Inbox.

**Email** – select “Also Send Email” to have the notice sent via email as well as to the IntegriLink Inbox.

5. Click **Save**.

NOTIFICATION	NOTICE	ALERT	SEND EMAIL
Check All Selections in Column	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assignment Complete Indicator checked on a case	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attachment added to a case	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case open past 5 days	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case due date approaching (within 2 days)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case past Due Date (for 4 days)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Disposition/Disposition Summary added or changed on a case	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Follow-up with New Information Received from Reporter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Follow-up without New Information Received from Reporter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investigation Note added to a case	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Case marked Legally Privileged	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Case marked Reportable to Audit Committee	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Case marked Potential Report to SEC	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Case marked Significant	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Case marked Up the Ladder	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
No Reply entered before follow-up date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Priority A allegation received	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Reply to Reporter entered on a case	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Status on a case changed to Archived	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Status on a case changed to Closed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Status on a case changed to No Action Required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Status on a case changed to Open	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Status on a case changed to Re-Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Translation received on a case	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

\* Requires the Configure Notifications Add-in.

## 6 Case Lists and Case Search

### 6.1 CASE LISTS

The IntegriLink case list displays up to 365 days of cases received through all sources—your phone- and web-based hotlines—and those entered directly through the case management service.

Report #	Date	Priority	Allegation Class	Allegation	Language Used	Source	Case Status	Location
GCPMT-15-08-0001	2015-08-04	C	Financial Concerns	Accounting and Auditing Practices	English	Certification Site	Open	Corporate Office
GCPMT-15-06-0005	2015-06-30	C	Financial Concerns	Conflict of Interest - Financial	Spanish	Mail	In Review	Cornelius Office
GCPMT-15-06-0004	2015-06-30	C	Employee Relations	Conflict of Interest - Personal	Spanish	E-Mail	New	Columbia Office
GCPMT-15-06-0003	2015-06-15	C	Financial Concerns	Conflict of Interest - Financial	Spanish	Facsimile	Open	Corporate Office
GCPMT-15-05-0003	2015-05-27	C	Financial Concerns	Conflict of Interest - Financial	English	Facsimile	New	Cornelius Office
GCPMT-15-05-0001	2015-05-18	C	Financial Concerns	Accounting and Auditing Practices	English	E-Mail	New	Cairo Office
GCPMT-15-04-0003	2015-04-23	C	Financial Concerns	Accounting and Auditing Practices	English	Website	New	Location Provided By Caller

Case list icons: paperclip = attachment; up arrow = follow-up

Available lists include:

- **Case List** – active cases (cases that are in any case status other than Archived)
- **My Open Assignments** – your incomplete assignments
- **My Saved Drafts** – drafts that you have created in the case management system
- **My Submitted Cases** – cases that you have submitted through the case management service
- **My Watchlist** – cases you have added to your watchlist

Allegation	Language Used	Source
All	All	All
Accounting and Auditing Practices		Certification Site
Antitrust or Fair Trading		Mail
Conflict of Interest - Financial		E-Mail
Conflict of Interest - Personal		Facsimile
Customer Relations		Facsimile
Falsification or Destruction of Information		
Gifts, Bribes and Kickbacks		
Harassment - Sexual		
Inappropriate Behavior		
Other		
Substance Abuse		
Theft		
Threats and Physical Violence		
Unfair Employment Practices		

Filter and sort case list columns

## 6.2 CASE SEARCH

Use the case search to look up multiple cases. You can specify multiple criteria, choose output fields, and download the results to a spreadsheet. You can also go to any case record by clicking the case number.

**To perform a case search:**

1. Select **Search** on the **Cases** tab.

2. Specify your search criteria, then click **Next**.

3. Choose the fields to include in the search results, then click **Continue**.
4. The search criteria and results are displayed.

**Case Search**

You have requested a search based on the following criteria:

Start Date: 2010-01-01  
End Date: 2010-04-30  
Priority: A

6 report(s) found.

Case #	Allegation	Report Initiated	Reply Date	Case Status
BTC-10-04-0022	Theft Of Company Property*	2010-04-26 12:56 ET	N/A	New
BTC-10-04-0017	Corporate Policy or Conduct Violation*	2010-04-19 21:04 ET	2010-04-22 16:50 ET	Open
BTC-10-04-0012	Falsification of Financial Records	2010-04-12 18:13 ET	N/A	New
BTC-10-04-0003	Theft Of Company Property*	2010-04-08 21:32 ET	N/A	New
BTC-10-04-0002	Antitrust or Fair Trading Violation*	2010-04-08 19:45 ET	N/A	Open
BTC-10-03-0003	Espionage & Sabotage*	2010-03-12 14:53 ET	2010-03-15 10:43 ET	Open

\* indicates Primary allegation.

Search results

### 6.3 CASE NUMBER SEARCH

**To search for a single case by case number:** Enter the case number, including the dashes (example: CASE-00-00-0000), and press **Enter**.

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IntegriLink

Contact | Help | Logout

Welcome Margaret Moynihan!

Quick Search

Case Number Search

My Homepage | Cases | Inbox | Analysis | Library

Case number search

## 7 Add New Case

Authorized users can enter cases directly through the case management service.

**To add a new case:**

1. From the **Cases** tab, click **Add New**.
2. Enter the case information. Required fields are identified with an asterisk ( \* ).

**Add New Case**

Select Program \* GC Portal Demo | English | Report Initiated \* :2015-09-03 | Source \* :

**REPORTER INFORMATION \***

Select One \*  
 Reporter is Anonymous  
 Reporter is Identified **Employee Lookup**

Prefix:

First Name \*  Middle Initial:  E-mail Address:

Last Name \*  Mailing Address:

Job Title:  City:

Phone Country:  Select Country Code  State:

Area Code:  Postal Code:

Number:  Country:

Phone Type:  Special Instructions:

**LOCATION INFORMATION \***

Lookup by Geography  
Please select the country:  --Select Country/Region--

Location Search  
Location Tag:  Location Name:

Street Address:  City:

State/Province:  Country:

ZIP/Postal Code:

**PRIMARY ALLEGATION \***

--Select Allegation Class-- | --Select Allegation-- | --Please select an allegation. -- | **Add**

**ISSUE SUMMARY \***

Provide a brief, one- to two-sentence summary of the reported issue. (Reminder: before entering non-English text, select the language from the list at the top of the page.) \*

Current text length (300 max): 0 **add**

**ISSUE DETAILS \***

Provide a detailed description of the reported issue. \*

Current text length (7000 max): 0 **add**

**PARTY INFORMATION** +  
**ADDITIONAL QUESTIONS** +  
**ATTACHMENTS** +  
**SPECIAL DELIVERY INSTRUCTIONS** +

**Cancel Save Draft Submit Case**

3. Click **Submit Case** to submit the case for automatic delivery to the designated contacts.

### Add New Case continued...

**Add New Case**

**CONFIRMATION**

The case has been submitted for delivery to the designated contacts.  
Report Number **GCPMT-15-09-0001** and a PIN of **2CRA**.  
To enter additional information for this case, choose "Continue to Case".

2015-09-10  No follow-up date  
yyyy-mm-dd

You may modify or delete the follow-up date if needed. If no follow-up date will be provided to the reporter, please select "No follow-up date".

[Continue to Case](#) [Add Another Case](#) [Go to Case List](#)

**Confirmation and case number**

- If you are set up to be assigned automatically to the cases that you submit, a message will indicate that you have been assigned to the case.
  - A follow-up date may be scheduled, based on your program guidelines. Typically, follow-up dates are generated for anonymous reporters.
4. To begin entering investigation details or to assign the case, click **Continue to Case**.
- This feature allows you to work with the case immediately rather than waiting for the case to be delivered to your case list. Once you leave the case, you cannot return to the case unless and until it is delivered to your case list.

## 7.1 ADD NEW CASE – FIELDS EXPLAINED

Field (* required fields)	Description
*Program	Lists your ethics and compliance program(s).
*Language	Indicate the language in which you are entering the case information. (Do not select the reporter's language unless you are entering the case information in that language.)
*Report Initiated	The Report Initiated date defaults to today's date. Users with "Change Initiated Date" permission can enter a different date. Note that the Report Initiated date cannot be changed after the report has been submitted (or saved as a draft).
*Source	Indicate the method by which the case information was received (e.g., email, office visit).
*Reporter Information	Choose "Reporter is anonymous" or "Reporter is identified." If the reporter is identified, name and contact information fields are displayed, and the reporter's first and last name are required.
*Location Information	Select the location where the issue occurred, or select the reporter's location. If the location is not listed, select the "Location not listed" checkbox and type in the location information.
*Primary Allegation	Select the allegation that best describes the primary issue. Adjust the allegation priority if needed.
*Issue Summary	Provide a brief, one- to two-sentence summary of the reported issue (up to 350 characters).
*Issue Details	Provide a detailed description of the reported issue (up to 7000 characters). Note that the Issues Details narrative is displayed to the reporter on your web-based hotline site if the reporter follows up online.
Party Information	If information about involved parties is available, indicate the party type (e.g., Subject, Witness, Other Involved Party), and the party's name and contact information. If you choose to enter party information, the party type and party first and last name are required.
Additional Questions	If additional interview questions have been set up for your program, they will be displayed here. Note that allegation-based questions set up for your web-based hotline are not displayed here.
Attachments	Authorized users may attach files to the case. Attachments are visible to all case management users who have access to the case. However, attachments are not emailed with the WPA Initial Report.
Special Delivery Instructions	Authorized users may select a special delivery option: <b>Deliver Online Only.</b> Do not send an email copy. <b>Reserve for "Special Handling."</b> The NAVEX Global Client Care Team will deliver the case according to your program's special handling instructions.
Follow-up Information	A follow-up date may be generated based on your program's follow-up guidelines. If a follow-up date is scheduled, it is displayed on the confirmation page.

## 7.2 EMPLOYEE LOOKUP IN ADD NEW CASE

Using the Employee Lookup\*\* when entering new cases is a convenient way to enter party information and to link to additional details that can be helpful when conducting an investigation.

**Add New Case**

Select Program\* : GC Portal Demo

**REPORTER INFORMATION\***

Select One\* :

Reporter is Anonymous

Reporter is Identified **Employee Lookup**

**Can be used when entering reporter information and when entering named parties**

**Employee Lookup**

Search

First Name: g Middle Initial: Last Name: Employee ID: Employee Status: [v]

Reset Search

Select Reporter

Total of 4 employee(s) found

Emp ID	Last Name	First Name	MI	Job Title	Status	Dept
<input type="radio"/> 524	Evans	Virginia	E		Active - Expatriate	Finance
<input type="radio"/> 544	Gaynor	Greg		Systems Engineer	Active	IT
<input type="radio"/> 508	Richardson	Ingrid	R		Active	Retail
<input type="radio"/> 506	Thomas	George	T		Active	Audit

\*\* Available to authorized users who have "Perform Employee Lookup" permission.

## 8 Working a Case

**This chapter will cover these aspects of working a case:** reviewing the case background, setting the case status, communicating with the reporter, attaching files, documenting investigation and resolution details, creating case PDFs, viewing the case history, and translating case information.

The top of the case view displays the case vitals. The left side contains the investigation information; monitor case progress on the right.

**NOTE:** To add a case to your watchlist, click the star icon with the plus sign. Watchlist cases are listed on your homepage.

**Case Vitals**

Case Status:	New
Case Due Date:	2016-06-22 13:10 ET
Days Open:	N/A
Report Initiated:	2016-08-02 13:10 ET
Scheduled Follow-up Date:	2016-08-16
Primary Allegation:	Threats and Physical Violence, A
Subject Name:	Zach Ambrose
Disposition:	N/A

**Issue Summary:**  
Data Sanitized

**Actions**

View Case History | Create PDF | Reply To Reporter  
Edit Case Status | Add Investigation Note | Quick Assign

**Case Status**

Case Status	Effective Date	Days Open	Case Due Date
New	2016-08-02	N/A	2016-09-22

**Tasks**  
No Tasks Found.

**Assignments**

Type	Assignee	Complete
Lead Investigator	emerson Fedele	<input type="checkbox"/>
Investigator	David Ford	<input type="checkbox"/>
Investigator	Nagam Asgam	<input checked="" type="checkbox"/>

**Related Policies**  
View Related Policies

**Attachments**  
83 of 100 mb used

Drag and drop files here to Upload  
OR  
Click to select files to Upload

Password Protect?  No **ADD**

File Name	Uploaded By	
Data Sanitized	Opal Oneider	<input type="checkbox"/>
Data Sanitized	Opal Oneider	<input type="checkbox"/>

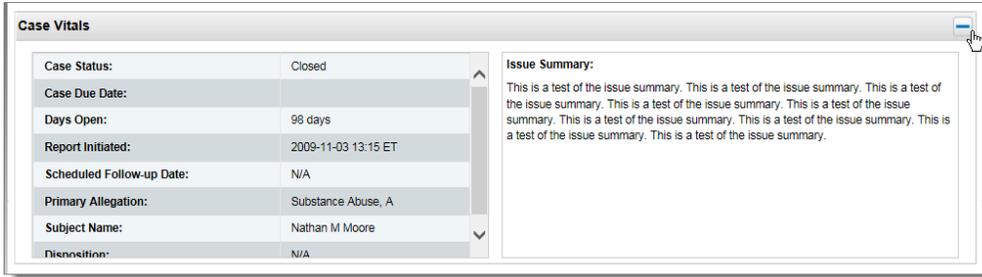
**Narrative**  
Summary | Details | Interview | Notes

Data Sanitized

**Other Background Details**

EEOC Charge?:  
Primary Subject Business Unit:  
Audit?:  
Custom 1 Radio Button:  
Medicare?:  
Recommendation/Remedial Action:  
Escalated:  
Primary Subject:  
Primary Subject Relationship:  
Primary Subject Location:  
Custom Numeric:

## 8.1 CASE VITALS



Collapsible Case Vitals section

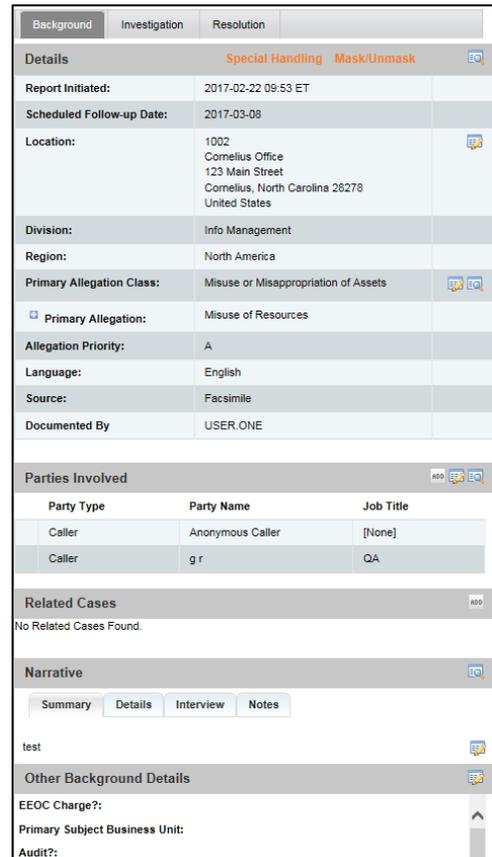
## 8.2 BACKGROUND

The Background section includes the information provided by the reporter in the WPA Initial Report.

### 8.2.1 BACKGROUND DETAILS

 **Show Details** – includes details displayed on the case view, plus secondary allegations

 **Edit** – available to authorized users





### Edit Location – To change the location:

1. Click the **Edit** button in the location section.

**Edit Location**

Case Number: GCPMT-09-11-0001

**Current Location**  
Location Provided By Caller  
333 Earnhardt Lane  
K-polis, NC 01234

**Lookup by Geography**

Country\*: --Select Country/Region--

**Location Search**

Location Tag:  Location Name:   
Street Address:  City:   
State/Province:  Zip Code:   
Country: --Select Country/Region--

**Find Location** **Clear**

**Cancel** **Save and Re-deliver** **Save**

(Note: Re-delivering the report will not affect existing Assignments to the case.)

2. Select a different location and click **Save**.



### Edit Allegations – To change or add an allegation or the allegation priority:

1. Click the **Edit** button in the allegation section.

**Edit Allegations**

Case Number: GCPMT-09-11-0001

Add Allegation\*: --Select Allegation Class-- -- Select Allegation -- -- Select Priority -- **Add**

**Current Allegations**

Primary	Priority	Allegation	Allegation Class
<input checked="" type="radio"/>	A	Substance Abuse	Environmental, Health and Safety

**Cancel** **Save and Re-deliver** **Save**

(Note: Re-delivering the report will not affect existing Assignments to the case.)

2. Make the needed changes, then click **Save**.

**NOTE:** To view the **Allegation History**, click the **View Details** button next to the Edit button.

## 8.2.2 PARTIES INVOLVED

Parties Involved		
Party Type	Party Name	Job Title
Caller	Sammy Posa	Manager
Subject	Charlotte Brown	Director

 **Add Party** – available to authorized users

 **Edit Parties** – available to authorized users, and includes ability to change an Anonymous party to an identified party

 **Show Details** – includes details displayed on the case view, plus: any phone numbers or email address provided

 **Party's Other Cases** – displays a list of cases in which the party has been named (includes cases in which the party was named as the reporter); only displays cases to which the logged in user has access

Parties Involved		
Party Type	Party Name	Job Title
Caller	Anonymous Caller	[None]
Subject	Lucas Johnson	

**Party's Other Cases**

Party: Lucas Johnson

Case Number	Report Initiated	Party Type	Case Status	Location
ETHDEMO-08-08-0058	2008-08-28 09:53 ET	Subject	Open	015 Location #15 1515 Rue de Fromage Paris 1960j87 France

If individuals identified are not actually the same person, select Party Unmatched to indicate that. The match remains visible, but is flagged as unmatched.

Party Detail					
Case Number: GCPMT-14-05-0003					
Party Type: Witness					
Party Name: Dominic W Williams					
Party's Other Cases					
Party Unmatched	Case Number	Report Initiated	Party Type	Case Status	Location
<input type="checkbox"/>	GCPMT-14-05-0001	2014-05-01 18:15 ET	Other Involved Party	Open	Data Sanitized

Parties Involved cont'd...



**Employee Detail\*** – when shown next to a party name in the Parties Involved section – displays additional employee data imported from your HR system such as employee ID, job status, and corrective actions

The screenshot shows a 'Parties Involved' table with two rows. The first row is 'Caller' for 'Francisco U Umberto' (Assistant). The second row is 'Subject' for 'George T Thomas', which is highlighted with a blue border and a callout box labeled 'Employee Detail'. To the right, the 'Employee Detail' pop-up displays the following information:

Employee Job Title:	
Employee Name:	George T Thomas
Employee ID:	506
Employee Status:	Active
Date of Hire:	1998-12-01
Business Unit:	Headquarters
Department:	Audit
Job Band:	2
Location:	123 Main Street Denver CO 22222
Business Phone:	222 222-2222 112
Mobile Phone:	
Home Phone:	
E-mail Address:	gt@email.com
Manager Name:	
Manager Job Title:	
Manager Business Phone:	
Corrective Action:	

! – indicates that a party named in another case has HR employee data associated with it. Click the icon to view the employee’s HR data and other cases

The screenshot shows a 'Party Detail' window for 'Lesia O Oppenheimer' (Subject) with the following information:

Case Number:	GCPMT-10-11-0068
Party Type:	Subject
Party Name:	Lesia O Oppenheimer
Employee Job Title:	
Employee ID:	514
Employee Status:	Active
Date of Hire:	2003-06-09
Business Unit:	
Department:	Sales
Job Band:	4
Location:	456 Corporate Parkway Miami FL 11111
Business Phone:	222 333-3333
Mobile Phone:	
Home Phone:	
E-mail Address:	
Manager Name:	Faith Francone
Manager Job Title:	Director
Manager Business Phone:	123-456-7890
Corrective Action:	

Below the Party Detail is a 'Party's Other Cases' table:

Case Number	Report Initiated	Party Type	Case Status	Location
GCPMT-10-11-0067	2010-11-12 19:58 ET	Other Involved Party	New	Location Provided By Caller

To the right, a 'Parties Involved' table for the other case is shown:

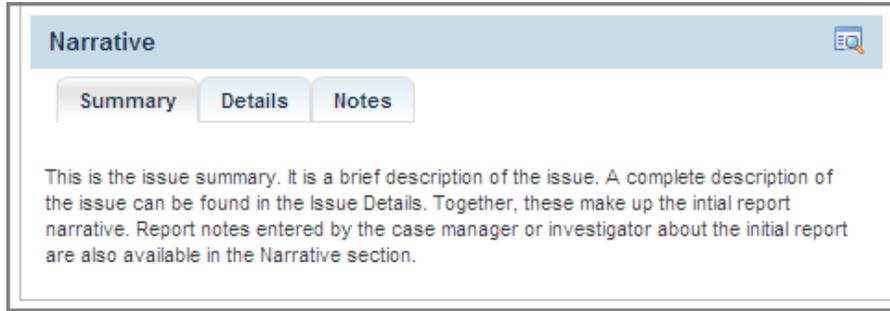
Party Type	Party Name
Caller	Anonymous Caller
Subject	Lesia O Oppenheimer

The 'Subject' row in the second table is highlighted with a blue border and a callout box containing a red exclamation mark icon.

**Named Party's Other Cases and Employee Data**

\* Requires HR Integration/Employee Lookup. Available to authorized users who have "View Employee Detail" permission.

### 8.2.3 NARRATIVE



 **Show Details** – shows the complete narrative, including the issue summary, issue details, and responses to any additional interview questions set up for your program

- Summary – displays the issue summary
- Details – displays the issue details
- Additional Questions (not shown) – available if additional interview questions are set up for your program

 **Edit Questions** – available to authorized users if additional interview questions are set up for your program

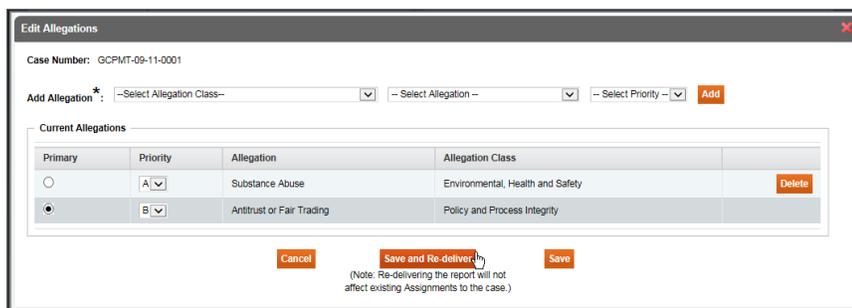
- Notes – displays case notes entered by the case manager or investigator

 **Add Note** – available to authorized users; delete available to authorized users

### 8.2.4 UPDATING AND REDELIVERING A CASE

When you make changes to locations, allegations, or additional questions, you can choose to re-deliver the case if the changes will result in a different set of reviewers being responsible for the case.

- Case assignees retain access to the case.
- The case is not available during delivery.



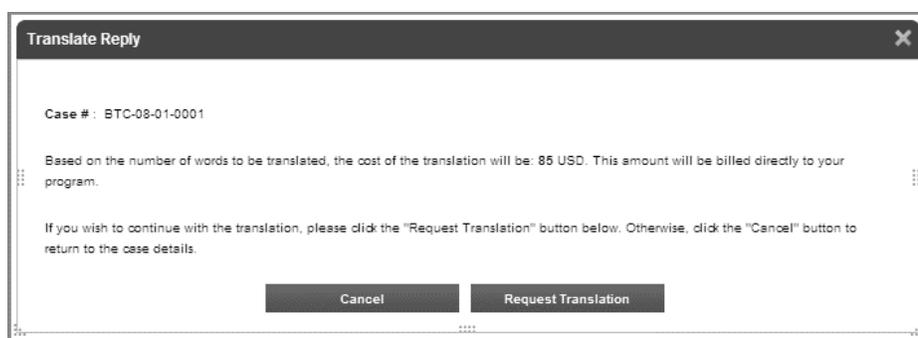
## 8.2.5 TRANSLATING THE INITIAL REPORT

Authorized users can submit text for translation by a third-party translation provider. When the translation becomes available in IntegriLink, an automatic email notification is sent to the user who requested the translation, and an alert is displayed on the homepage. All users with access to the case can then toggle between the original text and the translated text.

Cost of translation is based on word count and vendor pricing and may vary. **The calculated cost is automatically billed to the associated program.** There is a minimum translation fee for each translation.

Authorized users can submit non-English reports for translation into English. **To request a translation:**

1. In the Narrative section, click **Translate**. A confirmation prompt is displayed.



**\*Example only – actual translation costs vary**

2. Click **Request Translation** to submit the translation order.
3. When the translation is received, users can toggle between the original text and the translated text.

## 8.2.6 RELATED CASES\*

Authorized users can document relationships between cases. This information may be useful in investigating the current case and in identifying recurring issues. The Related Cases feature also makes navigation between related cases easier.

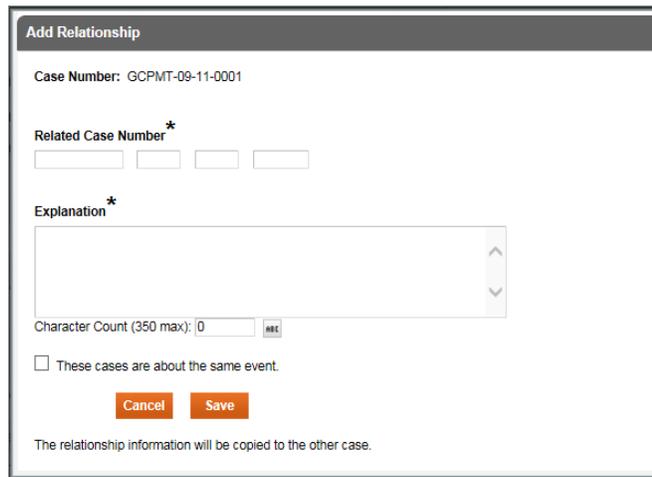
Related Cases			
Case Number	Added By	Date Added	
GCPMT-16-10-0001	Opal Oeder	2016-12-07 09:59 ET	DEL
This is the edited explanation.			EDIT

NOTE: To edit the Explanation, click the edit icon in the Related Cases explanation part of the screen (above) to open the Edit Explanation screen.

Permission to add and to view relationship information depends on access to both cases.

**To indicate a relationship between two cases:**

1. In the Related Cases section, click **Add**.



### Related Cases

2. In the **Related Case** field, type the report number of the related case.
3. In the **Explanation** field, briefly explain the relationship between the cases. The explanation will be visible to anyone who has access to both cases. This field is required.
4. If the two cases are about the same event, select **Same Event**.
5. Click **Save Relationship**. The saved relationship is documented in both cases.
6. To navigate to the related case, click the case number. The Report Details page of the related case is displayed.

To display related cases on the Case List, go to My Homepage > My Preferences > My Case List Settings.

\* Requires Related Cases Add-in

## 8.3 ASSIGNMENTS

An assignment gives you access to the case and indicates your role in the case. Assignees are automatically kept informed of case updates with automatic notifications.



Type	Assignee	Complete
Case Manager	Peter Phillips	
Investigator	Susan Samson	<input type="checkbox"/>

Mark your assignment complete when finished

### 8.3.1 ASSIGNMENT TYPES

- Case Manager – Typically has overall responsibility for a case.
- Investigator – Typically responsible for gathering information and completing action items.
- View Only – The View Only assignment type allows the individual to view the case, but does not allow the individual to add or edit case information.

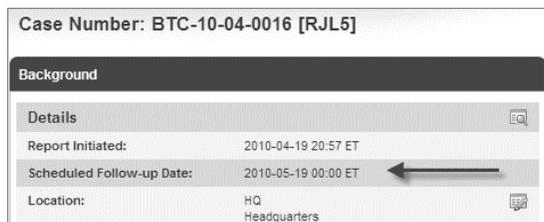
**To view assignment notes:** In the Assignments section, click the  **Show Details** button.

**To mark your assignment complete:** Select the checkbox next to your name. The assigner and other assignees are notified by email that you have completed your assignment.

## 8.4 COMMUNICATING WITH THE REPORTER

NAVEX Global facilitates confidential communication with reporters and tracks the communication timeline and details in the case. Communication with a reporter through the hotline consists of two communication types:

- **Reply to Reporter** – your organization’s response(s) to the reporter. These can be submitted through the case management service, and are provided to the reporter through the web- or phone-based hotline when the reporter follows up.



Case Number: BTC-10-04-0016 [RJL5]	
<b>Background</b>	
<b>Details</b>	
Report Initiated:	2010-04-19 20:57 ET
Scheduled Follow-up Date:	2010-05-19 00:00 ET
Location:	HQ Headquarters

**Tip:** A prompt initial response promotes confidence in the process. Check the **Scheduled Follow-up Date** in the case background.

- **Reporter Follow-up** – the reporter’s contact with the web- or phone-based hotline to follow up on a reported concern generates a WPA Follow-up Report.
  - The reporter is required to provide the original case number and PIN when following up.
  - Some reporters may have been given a scheduled follow-up date when first reporting a concern, depending on your program setup. Follow-up dates are most commonly scheduled for anonymous reporters.
  - When the reporter follows up online, the reporter can view the date of the initial report, and the Issue Details (the narrative description of the concern). The reporter can view replies from your organization, and also any information the reporter provided during previous follow-ups. The reporter cannot view the Issue Summary, allegation, case status, assignees, actions taken, or any other case information.
  - When the reporter follows up by phone, the reporter is provided any new replies from your organization and can provide additional information.

## Reply to Reporter

Communication with Reporter			
Type	Date Entered	Entered By	Language
Reply	2010-01-25	Peter Phillips	English
Thank you for reporting your concern. The information has been delivered to the designated contacts. Please feel			(more)
Follow-up	2010-01-27	WEBALLEGSUBMIT	English
I want to add that this has happened before. I was afraid to come forward because I thought it would put my job at risk.			(more)



**Add Reply** – available to authorized users



**Edit Reply** – available to authorized users



**Show Details** – shows communication details, including the date and time of each communication

### 8.4.2 REPLY TO REPORTER – ADD A REPLY

Authorized users can add replies.

#### To add a reply:

1. Click the **Reply to Reporter** action button.
2. Select a **Reply Type** to indicate the stage of communication with the reporter (e.g., “Initial” “Intermediate,” “Final,” or “Additional Information Requested”).
3. **Type the reply exactly as it should be presented to the reporter.**



If standard response text\* has been set up for your program, it will be displayed.

4. Click **Save**. The response is immediately available for the reporter to retrieve from the web- or phone-based hotline.

\* Requires Case Settings add-in.

### To edit an unread reply:

1. Click the **Edit** button.

**Edit Replies**

Case #: BTC-10-04-0017

Replies to the reporter may be edited until they are given to the reporter. Replies that have been submitted for translation cannot be modified. The following replies are available for editing

Date of Reply: 2010-04-28 10:27 ET  
Entered By: Peter Phillips  
Reply Type: Initial  
Reply Text: Thank you for reporting your concern. The information has been delivered to the designated contacts. Please feel free to follow-up through the hotline to provide additional information at any time.  
Character Count (4000 max): 198

Cancel Save

2. Make the needed changes then click **Save**.

### Replying in a language other than English

If the reporter provided information in a language other than English, you can:

- Enter a reply in the reporter's language
- Enter a reply in English and have it translated into the reporter's language (requires "Translate Replies to Reporter" permission)

### Email Notification to Reporter\*

Based on your program setup, the reporter may be notified by email when a reply is available for them. The email notification indicates the case number (but not the PIN) and explains how to follow up.

### Attaching a File for the Reporter

Based on your program setup, users who have both the "Add Replies to Reporter" and "Attach Files" permissions will be able to attach PDF files (up to 10MB per file) to replies to reporter. The attached file will be available in the Attachments section of the case and will be available to the reporter on the web intake site.

If the reporter follows up by phone, the Communication Specialist will read the following statement to the caller, along with any response made available: "A file has been made available. Please follow up on [www.alertline.com](http://www.alertline.com) with your report number and PIN in order to retrieve the file."

---

\* Optional functionality enabled upon request.

### 8.4.3 VIEW REPORTER FOLLOW-UP

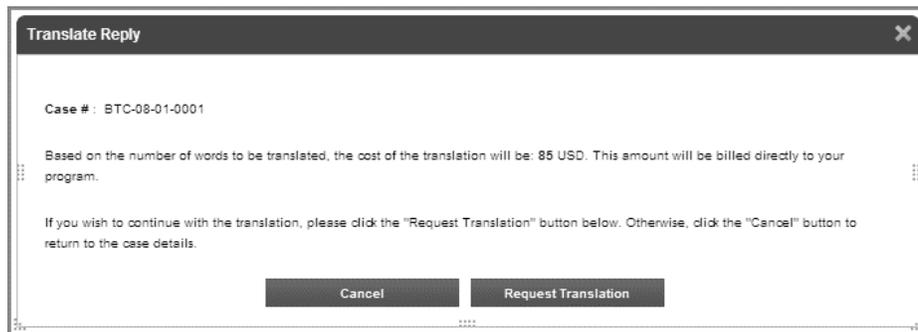
Follow-up information is displayed in the Communication with Reporter section.

Communication with Reporter			
Type	Date Entered	Entered By	Language
Reply	2010-01-25	Peter Phillips	English
Thank you for reporting your concern. The information has been delivered to the designated contacts. Please feel			(more)
Follow-up	2010-01-27	WEBALLEGSUBMIT	English
I want to add that this has happened before. I was afraid to come forward because I thought it would put my job at risk.			(more)

#### Translating a follow-up report

Authorized users can submit non-English reports for translation into English. The Translate function is available for non-English follow-up reports submitted via web intake site, even if the original report was submitted by phone. **To request a translation:**

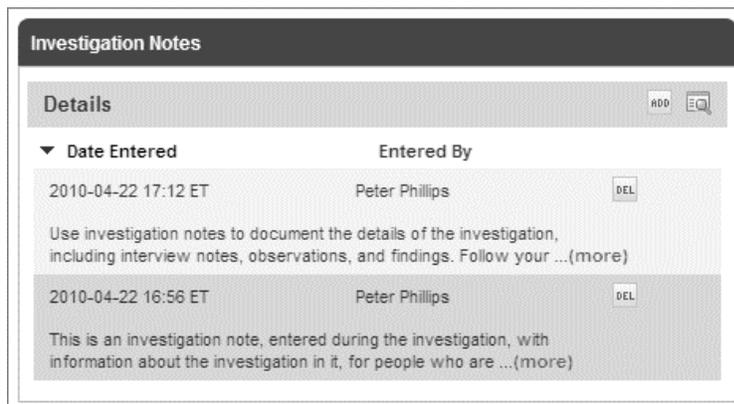
1. In the Communication with Reporter section, click **Translate**. A confirmation prompt is displayed.



**\*Example only – actual translation costs vary**

2. Click **Request Translation** to submit the translation order.
3. When the translation is received, users can toggle between the original text and the translated text.

## 8.5 INVESTIGATION NOTES



**Add Investigation Note** – available to authorized users



**Delete Investigation Note** – available to authorized users



**Edit Investigation Note** – available to users with “Modify Investigation Notes” permission



**Show Details** – shows all investigation notes, the date they were entered, and who entered them

### To add an investigation note:

1. In the Investigation Notes section, click **Add**.

2. Enter the investigation note (up to 8000 characters), then click **Save**.

### Other Investigation Details\*

If custom investigation fields have been created for your program, the “Other Investigation Details” section is displayed.

\* Requires Custom Case Fields add-in.

## 8.6 RESOLUTION DETAILS

Authorized users can view and edit case resolution information, including action taken and case disposition.

**Resolution**

**Disposition:** Case Substantiated

Use the disposition summary to explain the case disposition - whether substantiated or unsubstantiated. ...[\(more\)](#)

**Action Taken:** Advice Given

Use the action taken summary to explain the action that was taken in response to reported issue. ...[\(more\)](#)

**Add/Edit Action Taken and Action Taken Summary** – available to authorized users

**Add/Edit Case Disposition and Disposition Summary** – available to authorized users

**Show Details** – shows full resolution details, including date entered, and who entered them

### 8.6.1 ADDITIONAL ACTION DETAIL\*

For detail-level tracking of actions taken in response to a case, associate individual actions with a party and/or a date. Users with “View Resolution Details” permission can delete action detail records. Users with “Delete Additional Action” permission can delete action detail records.

Background Investigation **Resolution**

**Action Taken**

**Action Taken:** Discipline - Verbal Warning

The Subject was given a verbal warning.

Action Detail	Party	Date of Action
Resignation	Zach Ambrose	2010-11-26
The Subject resigned.		
Advice Given	Zach Ambrose	2010-11-01
The Subject was advised to consult with his manager.		

\* Additional Action Detail and Additional Disposition Detail require the Case Settings add-in.

**To add action details:**

1. In the Action Taken section, click the **Edit** button.

2. Select the action taken, select a party (optional), select a date (optional), and enter a note (optional).
3. Click **Add**.
4. Click **Save**.

---

### 8.6.2 ADDITIONAL DISPOSITION DETAIL \*

For detail-level tracking of issue disposition, associate a disposition with each allegation and party in a case. Users with “View Resolution Details” permission can delete disposition detail records. Users with “Delete Additional Disposition” permission can delete action disposition records.

Disposition		
Disposition: Partially Substantiated		
The reported issues were partially substantiated.		
Allegation	Party	Disposition
*Conflict of Interest - Financial,B	Zach Ambrose	Substantiated
Unfair Employment Practices,B	Linda Lemon	Unsubstantiated

---

\* Additional Action Detail and Additional Disposition Detail require the Case Settings add-in.

**To add disposition details:**

1. In the Disposition section, click the **Edit** button.

The screenshot shows a window titled "Edit Disposition" with a close button in the top right corner. The window contains the following elements:

- Case Number:** GCPMT-15-06-0006
- Disposition:** A dropdown menu with "Select Disposition" selected.
- Disposition Summary Notes:** A large text area with a character count of 0 and a "100%" indicator.
- Add Disposition Detail:** A section containing three dropdown menus: "Allegation" (Select Allegation), "Party" (Select Party), and "Disposition" (Select Disposition).
- Text Area:** A text area for notes below the dropdowns, with a character count of 0 and a "100%" indicator.
- Buttons:** An "Add" button to the right of the text area, and "Cancel" and "Save" buttons at the bottom of the window.

2. Select an allegation, select a party, select a disposition, and enter a note (optional).
3. Click **Add**.
4. Click **Save**.

**Other Resolution Details\*\***

If custom investigation fields have been created for your program, the "Other Investigation Details" section is displayed.

---

\*\* Requires Custom Case Fields add-in.

## 8.7 CASE STATUS

Use the case status to track case progress. Authorized users can set the case status.

- **New** – the default status for new cases
- **Open** – indicates that the case is in progress
- **Closed** – indicates that no new information is expected; closed cases are not editable
- **Re-open** – enables updates to a previously closed case
- **No Action Required** – indicates that no action is needed in response to the report
- **Archive** – moves the case from the active Case List to the Archived Case List, which is available to authorized users only

**To edit the case status:**

1. In the Status section, click the **Edit** button.

Case Status			
Case Status	Effective Date	Days Open	Case Due Date
Open	2015-07-15	56 days	2015-07-20

2. Select a case status, then click **Save**.

**Edit Case Status** ✖

Case Number: GCPMT-15-06-0006

Case Status \* :  ▼

Status Effective:

Case Due Date:

Send Due Date Reminders:  Yes  No

3. A notice is emailed to each person assigned to the case, and is delivered to each assignee's Inbox.

## 8.8 TASKS\*

Use tasks to keep up with action items for a case. Each task has an owner, a due date, and a status. Email notifications alert the task owner of new tasks, and alert the task creator of completed tasks.

Date Due	Status	Owner
2010-08-09	Not Started	Fenner F Flowers
Summarize the actions taken.		
2010-10-02	In Progress	Katrina Schnell
Complete the investigation checklist for financial issues.		
2010-07-30	Completed	Georgia James
Contact the witnesses.		
2010-08-12	Completed	Opal O Oneder
Reply to the reporter by the scheduled follow-up date.		

Users with  
"Manage Case Tasks"  
permission can add and  
update tasks

### To create a task:

1. In the Tasks section, click the **Add** button.

**Add New Task**

Case Number: GCPMT-15-09-0001

Task\*:

200 characters maximum

Task Owner\*: -- Please Select --

Task Due Date\*: 2015-09-09  
yyyy-mm-dd

Task Status\*: Not Started

Do not send e-mail notification of task.

2. Enter the task information.
3. Select a task owner (from list of individuals who received the initial report or who are assigned to the case).
4. Select a task due date.
5. Set the task status: Not Started, In Progress, Completed, Unable to Complete, or Canceled.

\* Requires Task Management Add-in

## 8.9 ATTACHMENTS

The Attachments section lists any files attached by the reporter via web-based hotline and any files attached during the investigation. Authorized users can upload files associated with a case.

**Tip.** Attachments can be viewed by all users who have access to the case. A padlock indicates a password-protected file.

Max file size per attachment: there is no per file size limit on files attached through the Attachments section.

File Name	Uploaded By	
Sample file.docx	Opal Onered	DEL

Browse... Password Protect? No

### To attach a file to the case:

1. In the Attachments section, click **Browse**.
2. Select the file and click **Open** to confirm the selection. (To select multiple files, hold the **Shift** key down and click on each file to be uploaded, then click **Open**.)
3. Click **Add** to upload the file.

### Deleting attachments:

Authorized users can delete their attachments.

## 8.10 CASE HISTORY

Case updates are tracked in the case history, which shows what change was made, when it was made, and who made it.

To view the case history, click the **View Case History** action button.



Case History

Case #: BTC-10-04-0014

Sort by user, date, or activity

User	Date	Activity
Peter Phillips	2010-04-27 14:26 ET	Investigation Notes Added.
Peter Phillips	2010-04-27 14:25 ET	Case Action Summary Added or Updated
Peter Phillips	2010-04-27 14:25 ET	Case Action Taken: Resignation
Peter Phillips	2010-04-27 14:25 ET	Disposition Added: Case Unsubstantiated
Peter Phillips	2010-04-27 14:25 ET	Disposition Summary Notes Added or Updated
Peter Phillips	2010-04-27 14:24 ET	Response Added: Final
Peter Phillips	2010-04-27 13:13 ET	Investigation Notes Added.
Peter Phillips	2010-04-27 11:14 ET	Report Summary Updated :sxofg sdfg

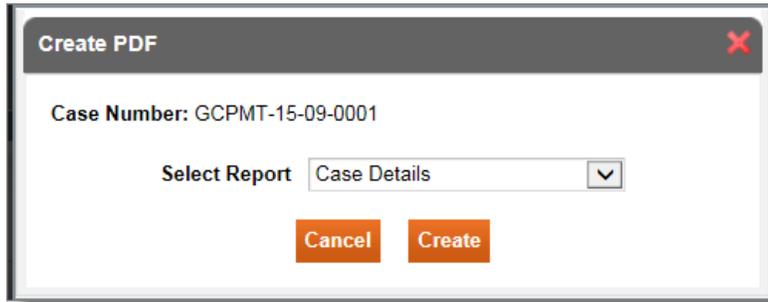
Case History

## 8.11 CASE PDFS

Authorized users can create case detail reports in PDF format. You can print or save the PDF file, or email it. The report information is current as of the time the PDF is generated.

### To create a PDF:

1. Click the **Create PDF** action button.



The screenshot shows a modal dialog box titled "Create PDF". Inside the dialog, the "Case Number" is "GCPMT-15-09-0001". Below this, there is a "Select Report" label and a dropdown menu with "Case Details" selected. At the bottom of the dialog, there are two buttons: "Cancel" and "Create".

2. Select a report:
  - Case Detail and Replies to Reporter
  - Case History
  - Case History plus Initial and Follow-up Details
  - Initial Report
3. Click **Create**.

---

## 9 Entering Follow-up Reports

---

### 9.1 ABOUT ENTERING FOLLOW-UP REPORTS

This capability allows you to track reporter communication that comes in through methods other than the phone-based or web-based hotline, and to have it reflected in follow-up report counts.

- Users with Add New Case permission will be able to enter follow-up reports.
- Report PIN is not required when entering follow-up reports through IntegriLink.
- Follow-up reports entered through IntegriLink generate WPA Follow-up Reports per existing phone- and web- intake rules.
- Follow-up reports are delivered per your organization’s follow-up report delivery rules.
- Entry is in English only.

**To enter a follow-up report:**

1. From the **Cases** tab, click **Enter Follow-up**.
2. When prompted, enter the case number.
3. Any replies that have been entered for the reporter are displayed, including new and previous replies.

If a new reply is available, the following question is displayed: “Has this reply been provided to the reporter?”

- If you click **Yes**, the reply is marked as read.
- If you click **No**, the new response will remain available for the reporter and will not be marked as “read”.

If the scheduled follow-up date is in the future, no new reply is available, and the reporter is not providing additional information, you will not be able to enter a follow-up.

4. Click **Continue**.
5. Enter the follow-up information. Required fields are identified with an asterisk ( \* ).
6. Click **Submit Follow-up** to submit the case for automatic delivery to the designated contacts. (Or click **Save as Draft**. The report will be available on the My Saved Drafts list.)

The confirmation page displays case number, PIN and scheduled follow-up date (or “N/A” if none scheduled).

- **Continue to Case** – displays only if the user entering the follow-up has access to the case
- **Enter Another Follow-up** – to go to the Enter Follow-up page where you will be prompted to enter a case number
- **Go to Case List** – to go to the Case List

## 9.2 ENTER FOLLOW-UP – FIELDS EXPLAINED

### Follow-up Report Details section

**Additional Information from Reporter:** enter additional information or indicate no additional information was provided.

**Follow-up type:** Select a follow-up type.

**Report source:** Indicate the method by which the case information was received (e.g., email, office visit).

**Additional follow-up date:** Indicate whether an additional follow-up should be scheduled. If yes, the follow-up will be scheduled according to the scheduling guidelines for your program.

- Tip: If the reporter has provided an email address, the reporter will be notified automatically when a reply to the reporter is available (for more information, see the [Email Notification to Reporter](#) section). Schedule an additional follow-up only if your organization will provide a reply to the reporter by that date, and the reporter has not provided an email address in order to be notified of new responses.
- Note: Additional follow-up dates can only be scheduled through this process in IntegriLink. NAVEX Global does not schedule additional follow-up reports through the phone-based or web-based hotline.

### Allegation Information section

The Allegation Information section shows the initial report allegations.

### Parties Involved section

The Parties Involved section shows all parties associated with the case.

- To add additional parties, click **Add Party**. (If using the Employee Lookup module, the lookup will be available. For more information, see the [Employee Lookup](#) section.)
- Tip: If an anonymous reporter chooses to provide identifying information during the follow-up, add a new party with party type Caller (as in the Contact Center).

### Location Information section

The Location Information section shows the initial report location.

### Initial Report Details section

The Initial Report Details section shows the Issue Summary (latest saved version) and the Issue Details. If the initial report text was not entered in English, each field displays “This report was taken in <language>.”

### Communication History section

The Communication History section shows replies entered for the reporter.

If the reply has not been provided to the reporter, the “Date Provided” field and the “Provided By” field will be blank.

## 10 Inbox

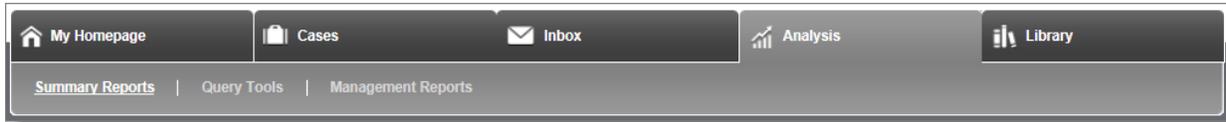
Alerts and notices of program activity are conveniently delivered to your IntegriLink Inbox.

- **Alerts** – high priority or time-sensitive activity and action items (alerts are also displayed on the homepage). Standard alerts include:
  - Receipt of priority A allegation
  - Receipt of translation (initial report, follow-up report, response)
  - Notice of scheduled follow-up date with no response entered (displayed one day before scheduled follow-up date)
  - Receipt of new information from Reporter (new follow-up in which Reporter has provided additional information)
- **Notices** – case activity notifications. Standard notices include:
  - Assignment Complete indicator is checked
  - Attachment is added to a case
  - Disposition/Disposition Summary is added or changed on a case
  - Follow-up is added to a report
  - Investigation Note is added to a case
  - Reply to the Reporter is added to a report
  - Status is changed on a report

Message	Case Status	Date	Category	Check All
Case Assignment Complete : GCPMT-16-03-0005	New	2016-11-08 09:15 ET	Notice	<input type="checkbox"/>
Case Assignment Complete : GCPMT-11-07-0024	New	2016-11-05 07:38 ET	Notice	<input type="checkbox"/>
Case Assignment Complete : GCPMT-15-02-0011	Open	2016-11-05 02:50 ET	Notice	<input type="checkbox"/>
Investigation Note Added : GCPMT-16-03-0005	New	2016-11-05 02:48 ET	Notice	<input type="checkbox"/>
Case Assignment Complete : GCPMT-16-10-0003	Re-Open	2016-10-18 15:39 ET	Notice	<input type="checkbox"/>
Case Assignment Complete : GCPMT-16-10-0003	Re-Open	2016-10-18 15:37 ET	Notice	<input type="checkbox"/>
Attachment Added : GCPMT-16-03-0005	New	2016-10-03 11:31 ET	Notice	<input type="checkbox"/>
Attachment Added : GCPMT-16-03-0005	New	2016-10-03 11:25 ET	Notice	<input type="checkbox"/>
Attachment Added : GCPMT-16-03-0005	New	2016-10-03 11:20 ET	Notice	<input type="checkbox"/>
Attachment Added : GCPMT-16-03-0005	New	2016-10-03 11:18 ET	Notice	<input type="checkbox"/>

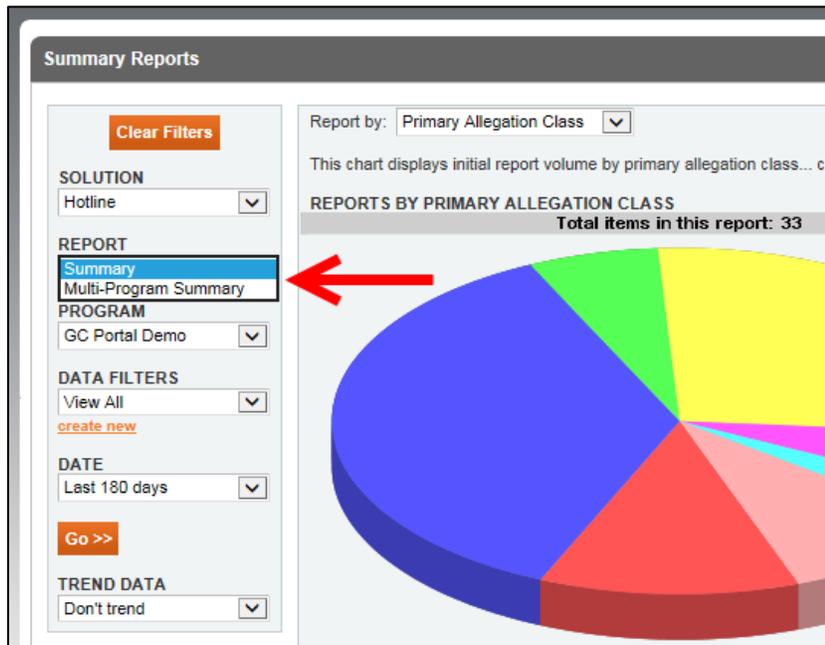
Showing 1 - 10 of 939 results.      Items per Page 10      Page 1 of 94

# 11 Analysis



## 11.1 SUMMARY REPORTS

Presentation-ready charts and graphs provide real-time insight into allegation report volume and issue types, either in a summary report or a multi-program summary report. Set filters, click through to detail, print, or download to spreadsheet. Trend data over three, six, or twelve months. For a list of available summary reports, see the Appendix.



Click through to detail...

**Print or export summary detail**

Report by: Details

This report displays case details for reports within the selected date range.

Total items in this report: 7

Case #	Report Initiated	Location	Source	Case Status	Allegation	Priority	Days Open	Exclude from Print (Check All) (Clear All)
GCPMT-15-03-0010	2015-03-27 15:02 ET	New Orleans Office	E-Mail	New	Conflict of Interest - Financial	C	N/A	<input type="checkbox"/>
GCPMT-15-04-0003	2015-04-23 02:47 ET	Location Provided By Caller	Website	New	Accounting and Auditing Practices	C	N/A	<input type="checkbox"/>
GCPMT-15-05-0001	2015-05-18 15:42 ET	Cairo Office	E-Mail	New	Accounting and Auditing Practices	C	N/A	<input type="checkbox"/>
GCPMT-15-05-0003	2015-05-27 16:52 ET	Cornelius Office	Facsimile	New	Conflict of Interest - Financial	C	N/A	<input type="checkbox"/>
GCPMT-15-06-0003	2015-06-15 15:16 ET	Corporate Office	Facsimile	Open	Conflict of Interest - Financial	C	72	<input type="checkbox"/>
GCPMT-15-06-0005	2015-06-30 16:06 ET	Cornelius Office	Mail	In Review	Conflict of Interest - Financial	C	1	<input type="checkbox"/>
GCPMT-15-08-0001	2015-08-04 13:36 ET	Corporate Office	Certification Site	Open	Accounting and Auditing Practices	C	35	<input type="checkbox"/>

### 11.1.1 CREATE NEW FILTER

To create and save a data filter for your summary reports:

1. Click the “Create New” link in the Data Filters section.

**DATA FILTERS**

View All

[create new](#)

**Create New Data Filter** ✕

Filters allow you to narrow down on specific data that you would like to see. Please give the filter a name and select the options you would like to set for this filter. After you save the filter, simply select it from the left hand menu.

**1) Filter Name**

Name:

---

**2) Source / Priority / Status Filter**

Report Source:

- Certification Site
- Other
- E-Mail
- Facsimile
- Interoffice Mail
- Mail

Select All   Deselect All

Priority Values:

- A
- B
- C

Select All   Deselect All

Case Status:

- Archive
- Closed
- In Review
- New
- No Action Required
- Open

Select All   Deselect All

---

**3) Location / Type Filter**

Location:

- Amsterdam Office
- Ankara Office
- Atlanta Office
- Beijing Office
- Berlin Office
- Cairo Office
- Cancun Office (Mexico)
- Certification Questionnaire
- Columbia Office
- Cornelius Office
- Corporate Office
- GCPMT Reporting - Not Whiteacre
- GCPMT Reporting - Whiteacre
- Location Not Required - Informator
- Location Provided By Caller

Select All   Deselect All

Allegation:

- Diversity, Equal Opportunity and Respect in the Workplace
- > Discrimination
- > Harassment - Sexual
- > Harassment - Workplace
- > Retaliation or Retribution
- Employee Relations
- > Conflict of Interest - Personal
- > Inappropriate Behavior
- > Unfair Employment Practices
- Environmental, Health and Safety
- > Environment, Health and Safety
- > Substance Abuse
- > Threats and Physical Violence
- Financial Concerns
- > Accounting and Auditing Practices

Select All   Deselect All

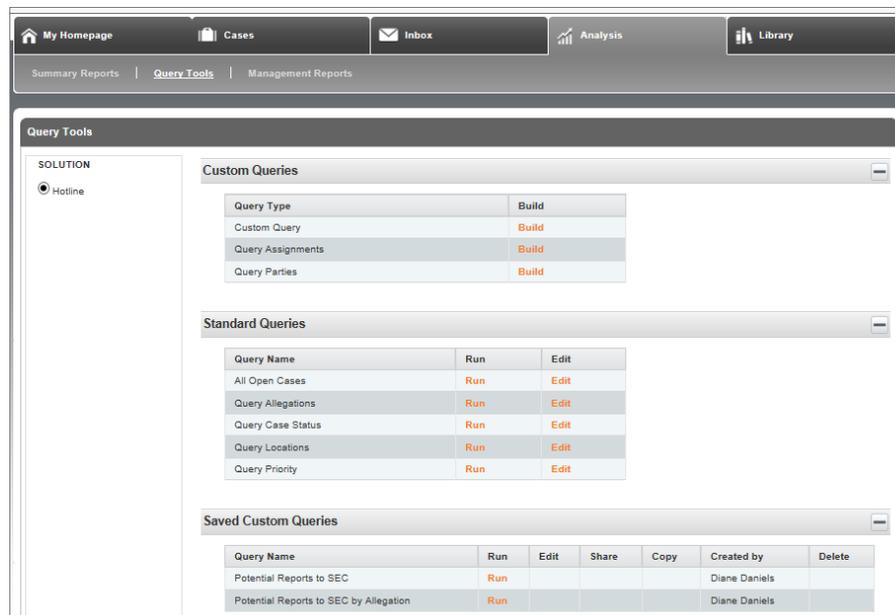
Save
Cancel

2. Name the filter, specify the filter criteria, then click **Save**.

## 11.2 QUERY TOOLS

Users who have “Use Query Tools” permission can query program data, click through to detail records, and export results to a spreadsheet for additional analysis (including the ability to output the Issue Details field in the original non-English language). Query Tools for Hotline Solutions includes standard, editable queries and the ability to build and share custom queries.

For a list of available queries, see the Appendix.



Analysis > Query Tools

### 11.2.1 QUERY ACTIONS

- **Run** – run a saved query. Search and output fields are already determined. You just specify search values such as date range.
- **Edit** – make changes to a saved query. Modify search fields, search values, and output. You can choose to save your changes to the existing query (custom queries only) or save your changes as a new query.
- **Build** – create a custom query. Two types of custom queries are available: a Custom Query outputs one row per case; Assignment and Party queries output results in a list format suited to viewing multiple assignments or parties per case.
- **Share** – allow other users to run your custom query against their data.
- **Copy** – give other users a copy of a custom query which they can then run, edit, share, copy or delete.
- **Delete** – delete custom queries.

For more information, see the sections below.

## 11.2.2 RUN A QUERY

Standard Queries		
Query Name	Run	Edit
All Open Cases	Run	Edit
Query Allegations	Run	Edit
Query Case Status	Run	Edit
Query Locations	Run	Edit
Query Priority	Run	Edit

- **To run a query:** Click **Run**.
- Select search values, such as date range. Then click **Run Query**.

The screenshot shows the 'Query Tools' interface. At the top, it says 'Query: All Open Cases'. Below that, there's a dropdown for 'Select a Program' set to 'GC Portal Demo'. The 'Date Range' section has 'Date Type' set to 'Case Initiated Date' and 'Date Range' set to 'Standard'. There are 'View All', 'From', and 'To' fields. The 'Status Details' section has 'Case Status' set to 'Open' and 'Status Effective Date' set to 'Between 2015-01-01 and 2015-07-31'. A dropdown menu for 'Status' is open, showing 'New', 'Status Not Set', 'Open', 'Closed', and 'In Review'. At the bottom, there are 'Reset' and 'Run Query' buttons.

The screenshot shows the results of a search for 'All Open Cases'. It includes a 'Back' button and a 'Start New Query' button. Below the buttons, it says 'You have requested a search based on the following criteria:' followed by the search criteria: 'Case Initiated Date: 1900-01-01 - 2015-09-10', 'Status Details: Open', and 'Status Effective Date: 2015-01-01 - 2015-07-31'. It also says 'Showing 8 results.' and '(Longer text fields are truncated in this display and are best viewed when output to a spreadsheet.)'. The results are shown in a table with columns: Report Number, Report Type, Case Initiated, Location Name, Location Tag, Primary Allegation Classification, and Primary Allegation Type.

Report Number	Report Type	Case Initiated	Location Name	Location Tag	Primary Allegation Classification	Primary Allegation Type
GCPMT-15-01-0001	WPA Initial Report	2015-01-29 11:24	Atlanta Office	1100	Diversity, Equal Opportunity and Respect in the Workplace	Retaliation or Retribution
GCPMT-15-02-0001	WPA Initial Report	2015-02-06 05:54	London Office	9000	Financial Concerns	Conflict of Interest - Finance
GCPMT-15-02-0002	WPA Initial Report	2015-02-10 10:12	Richmond Office	1400	Misuse or Misappropriation of Assets	Customer Relations
GCPMT-15-02-0011	WPA Initial Report	2015-02-27 14:14	Location Provided By Caller	PROVIDED	Employee Relations	Inappropriate Behavior
GCPMT-15-02-0014	WPA Initial Report	2015-02-27 14:45	Amsterdam Office	7000	Other	Other
GCPMT-15-03-0009	WPA Initial Report	2015-03-27 14:12	Location Provided By Caller	PROVIDED	Misuse or Misappropriation of Assets	Disclosure of Confidential In
GCPMT-15-06-0003	WPA Initial Report	2015-06-15 15:16	Corporate Office	HQ	Financial Concerns	Conflict of Interest - Finance
GCPMT-15-06-0006	WPA Initial Report	2015-06-30 16:31	Corporate Office	HQ	Policy and Process Integrity	Antitrust or Fair Trading

Showing 8 results.

- From the query results you can:
  - Click through to a case by clicking the case number
  - Export the results to a spreadsheet (.XLS or .CSV)\*
  - Print the page

\* Tip. When returning large data sets, allow a few seconds for the results to load before exporting to a spreadsheet. When exported before the results have loaded, column headings may be distorted.

### 11.2.3 EDITING A QUERY

- **To edit a query:** Click **Edit**.
- You may select different search fields, search values, and output options. (For field definitions and options, see the Appendix.)

**Query Tools**

Edit Query (All Open Cases): Select Search Fields ⓘ

Select Basic Criteria Values

Select a Program: GC Portal Demo

Date Range

Date Type: Case Initiated Date

Date Range:  Standard  Custom Date Range

View All From: To:

Select Additional Criteria

To further narrow your search, you may choose from the fields below.  
Tip: Selecting fewer fields returns more reports; selecting more fields returns fewer reports.

Initial Report Details

Awareness Resource  Case Note  Documented By  First Time Use  
 Issue Narrative/Summary  Language  Source

Location Information

Location Address  Location Function  Location Geography  Location Name  
 Location Tag  Location Unknown

Allegation Information

Allegation Classification  Allegation Type  Priority

### 11.2.4 BUILDING A CUSTOM QUERY

Custom Queries	
Query Type	Build
Custom Query	<a href="#">Build</a>
Query Assignments	<a href="#">Build</a>
Query Parties	<a href="#">Build</a>

Building a custom query is a 3-step process: Select Search Fields, Select Search Values, Select Output Fields.

**Query Tools**

Build Custom Query: Select Search Fields ⓘ

Select Basic Criteria Values

Select a Program: GC Portal Demo

Date Range: Standard

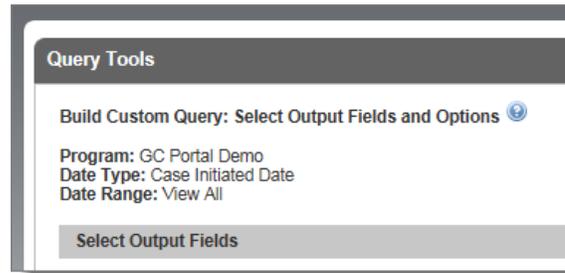
**Query Tools**

Build Custom Query: Select Search Values ⓘ

Program: GC Portal Demo  
Date Type: Case Initiated Date  
Date Range: View All

Select Search Values

**Top-of-page labels summarize your selections**



**To build a custom query:** click **Build**.

**Step 1:** Select a program, a date type and date range, and select search fields.

**Step 2:** Refine the query criteria by specifying the values that you are looking for.

**Step 3:** Choose the output fields, chart options, and save option. Then click Run Query.

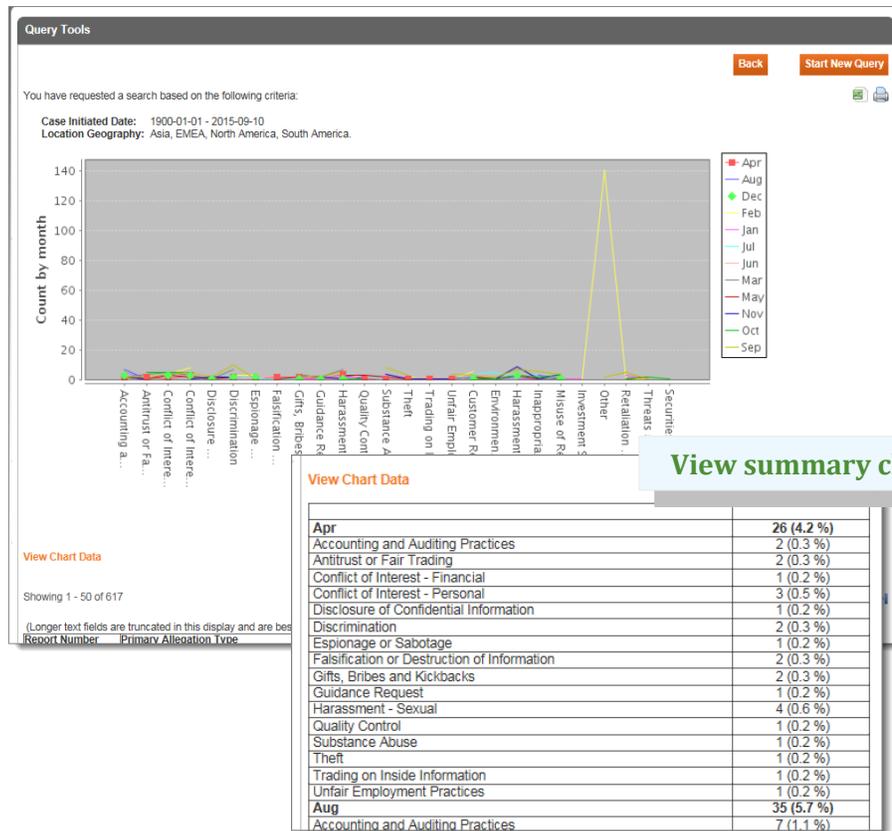
### 11.2.5 CHARTING QUERY OUTPUT

To chart query output:

- Select a chart type.
- Select chart fields.

**Tip.** To preview charted results, click Run Query to view results. Then click the Back button on the results page to return to the Select Output page.

Select Chart Options



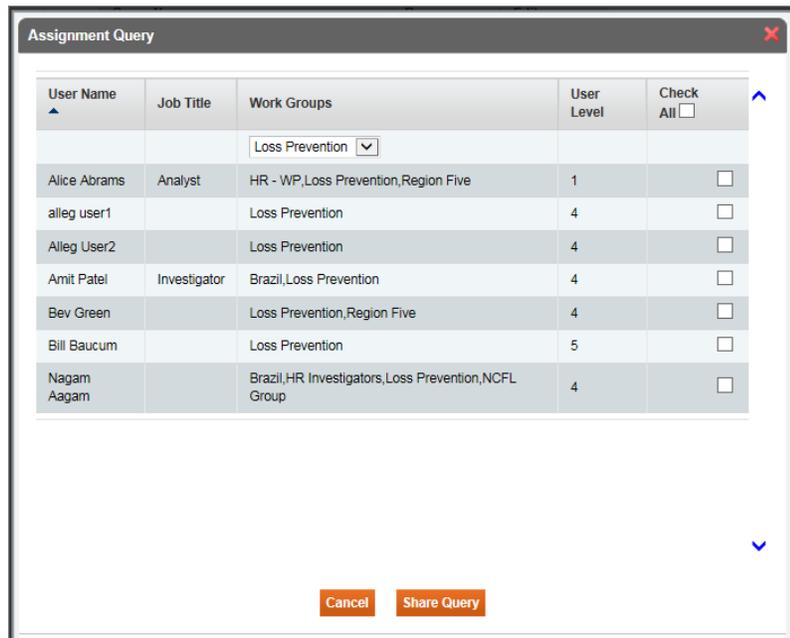
View summary chart data

### 11.2.6 SHARING QUERIES

You can share your custom queries with other users in your organization. Sharing a query allows other users to run the query against their own data while you maintain control over the query parameters. Changes that you make to the shared query are automatically available to the users who share it. Deleting a shared query removes it from your Saved Queries list and from the users you've shared it with.

**To share a saved query:**

1. Click the **Share** link next to the query name.



2. Select users to share the query with, then click **Share Query**. The query will be displayed in the user's list of existing queries. Users are notified of the shared query by email.

### 11.2.7 COPYING QUERIES

Copying a query to another user give the user their own copy of the query, to modify as needed. Your changes do not impact the other user's copy, and their changes to impact your query.

**To copy a saved query:**

1. Click the **Copy** link next to the query name.
2. Select users to copy the query to, then click **Copy Query**. The query will be displayed in the user's list of existing queries. Users are notified of the copied query by email.

---

## 12 Library

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The Library may include resources provided by your organization.

The screenshot displays a navigation bar with five tabs: 'My Homepage', 'Cases', 'Inbox', 'Analysis', and 'Library'. The 'Library' tab is selected. Below the navigation bar is a section titled 'Uploaded Files' containing a table with the following data:

File Name ▲	Date Uploaded	File Type	File Size (KB)	Category	Uploaded By
Code of Ethics	2011-02-24 11:17 ET	PDF	60	HSAR	Terrence Twain
Dodd-Frank Quick Reference Guide	2011-10-17 11:54 ET	PDF	747	HSAR	Diane Daniels

Showing 2 results.

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## 13 Appendix

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### 13.1 SUMMARY REPORTS

Summary reports are available on the Summary Reports page of the Analysis tab.

Summary Report	Description
Allegation Class Report	Volume by primary allegation class.
Allegation Priority Report	Volume by primary allegation priority.
Allegation Report	Volume by primary allegation.
Anonymity Report	Percent anonymous.
Case Details Report	Detail report includes case number, initiated date, location, source, case status, allegation, allegation priority, and number of days open.
Case Overview Report	Detail report includes case number, report initiated, location, case status, days open, scheduled follow-up date, allegations, issue summary, disposition, and action taken.
Days Open Report	Open case aging by number of days open.
Disposition Report	Substantiation rates.
Disposition and Anonymity	Percent anonymous by disposition.
Follow-ups and Anonymity	follow-up rates among anonymous and identified reporters
Location Report	Volume by location.
Source Report	Volume by report source (i.e., hotline, web submission).

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## Glossary

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Allegation	Categorization of a reported issue.
Allegation priority	Indicates the urgency of the reported issue.
Alert	Notification of high priority or time-sensitive activity and action items. Displayed on the homepage and in the IntegriLink Inbox.
Case number	Unique identifier generated for each WPA Initial Report. Includes the abbreviated program name (the “program tag”), the year and month that the report was taken, and the sequence number for that month.
WPA Follow-up Report	A report generated by a reporter’s contact with the web- or phone-based hotline about a previously reported concern. Categorized by a follow-up type, which describes the information exchanged during the follow-up (e.g., “Additional Information Provided by Reporter,” “Reply Provided to Reporter”).
Hotline	Confidential issue reporting service. NAVEX Global offers web-based and phone-based hotline services.
Information referral	Documentation of a call to the phone-based hotline during which no actionable information was provided and which did not result in a WPA Initial Report or WPA Follow-up.
Metrics	Calculated statistics such as case volume.
Notice	Notification of case activity and updates. Delivered to the IntegriLink Inbox and by email.
Party	Person involved in a reported issue. Could be the reporter, subject(s), witness(es), or other involved individuals.
Priority A	Allegation priority. Reports that require immediate review and/or action due to an allegation of immediate threat to person, property or environment.
Priority B	Allegation priority. Reports of time-sensitive information that may require prompt review and/or action.
Priority C	Allegation priority. Reports that do not require immediate action.
Program	An organization’s ethics and compliance program (e.g., “XYZ Corp Ethics Line”) and the information and services associated with it.
Report contact	An individual who is set up to receive hotline reports (i.e., who is notified of reported issues).
Reporter	An individual who reports a concern.
Reply	An organization’s response to a reporter regarding a reported concern.
WPA Initial Report	WPA (Workplace Alert) Initial Report. Generated by a reporter’s initial contact with the hotline service to report a concern. Also known as an allegation report.

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