

A chalkboard with a lightbulb in the center. The board is covered with hand-drawn diagrams consisting of circles and lines, suggesting a process flow or organizational chart. The lightbulb is unlit and positioned in the middle of the board.

INTEGRITY **COUNTS**

New Features

Case Updates, Case Tagging & Activity Log

INTEGRITY **COUNTS** Introduction Case Manager Insights File by Proxy English

Home > Case Search > Case Details > Information

Case Details - 50688

RESPONDED |

Priority: Normal Proxy: No Days Open: 47 Updated: 2021/09/10 1:15 PM

HR X External X + Add Tag

Information

Details

Client Name
Generic Company 

Date of Occurrence:
September 10, 2021 - September 10, 2021

Reported Date
September 10, 2021 1:14 PM

Case Source
Web

Location
Location 2 

Department
Customer Service 

Case Anonymity Level
Contact Information Provided

Contact Information

Reporter Name
Da*****

Employee Number
Not provided

Contact Number:
Not provided

E-mail Address
dtejeda+gc@*****.com

Best way to contact
EMAIL

Notify
Yes

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Client Name

Generic Company

Changing the Case Company, Location, Department

- **Company:** If the client has more than one company, click the pen/edit icon under client name. Click the drop down and select the correct company. Click the disk/save icon. *This change is accessible for Review Managers only.*
- **Location (or similar):** Click the pen/edit icon, click the drop down and select the correct option. Click the disk/save icon. *This change is accessible for Review Managers only.*
- **Department (or similar):** Click the pen/edit icon, click the drop down and select the correct option. Click the disk/save button. *This change is accessible for Review Managers only.*

The screenshot displays the 'Case Details - 50688' page in the Integrity Counts Case Manager. The 'Description' tab is active, showing a 'Test case' and a 'Case Types' section. The 'Case Types' section is highlighted with a red box, and a red arrow points to the edit icon next to 'Criminal Activity x'. The interface includes a sidebar with navigation options like 'Information', 'Description', and 'Case Activity', and a main content area with fields for 'Priority', 'Proxy', 'Days Open', and 'Updated'.

Changing the Case Types

In Description, click the pen/edit icon next to Case Types. Add or remove a Case Type, then Save your changes.

NOTE: These Case Types must already exist in your account.

If you would like to edit the Case Types please contact the services team at support@integritycounts.ca.

The screenshot displays the Integrity Counts Case Manager interface. The top navigation bar includes 'Introduction', 'Case Manager', and 'Insights'. The 'Case Manager' tab is active, and the 'File by Proxy' button is visible. The main content area shows the 'Case Details - 50688' page. The case status is 'RESPONDED'. Key details include: Priority: Normal, Proxy: No, Days Open: 47, and Updated: 2021/09/10 1:15PM. There are tags for 'HRX' and 'External X', and a '+ Add Tag' button. The 'Information' section is divided into 'Details' and 'Contact Information'. The 'Details' section includes Client Name (Generic Company), Date of Occurrence (September 10, 2021 - September 10, 2021), Reported Date (September 10, 2021 1:14 PM), Case Source (Web), Location (Location 2), Department (Customer Service), and Case Anonymity Level (Contact Information Provided). The 'Contact Information' section includes Reporter Name (Da*****), Employee Number (Not provided), Contact Number (Not provided), E-mail Address (dtejeda+gc@*****.com), Best way to contact (EMAIL), and Notify (Yes). The footer contains copyright information for 2021 and a 'NETSCAPE GARD' logo.

Case Tagging

- Review Managers can now tag a case by clicking on the (+ Add tag) button and entering in the tag of their choosing. Reviewers can view tags that have been created by Review Managers.
- In Case Search, click the columns button, and select "Tags" to add that column to the displayed results.

The screenshot shows the 'Case Activity - 50688' page in the Integrity Counts application. The page includes a navigation menu on the left with 'Activity Log' selected. The main content area displays case details and an activity log table.

Case Activity - 50688 RESPONDED |

Priority: Normal Proxy: No Days Open: 47 Updated: 2021/09/10 1:15PM

Tags: HR External + Add Tag

Activity Log Export to Excel Refresh Show All

Date/Time	User	Event	Details
Oct 27, 2021 / 4:17PM	John McLein	Viewed	
Oct 27, 2021 / 4:17PM	John McLein	Viewed	
Oct 27, 2021 / 4:11PM	John McLein	Viewed	
Oct 27, 2021 / 3:55PM	John McLein	Viewed	
Oct 27, 2021 / 3:17PM	John McLein	Viewed	
Oct 27, 2021 / 2:56PM	John McLein	Viewed	
Oct 27, 2021 / 2:28PM	John McLein	Viewed	
Oct 27, 2021 / 2:19PM	John McLein	Viewed	
Oct 26, 2021 / 8:49PM	WBS Support Team	Tag Added	[External]
Oct 26, 2021 / 8:49PM	WBS Support Team	Tag Added	[HR]

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- Click on Activity Log to view any activity that has happened on the case.
- Any activity on the case is logged including but not limited to case creation, viewing the case, changes to the case, messages in the case and closing the case.