THE POWER TO KNOW®

SAS® Enterprise Case Management 2.2
User's Guide

SAS® Documentation

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Contents

Chapter 1 • Introduction **1**
What's New in SAS Enterprise Case Management 2.2 1
Accessibility Features of SAS Enterprise Case Management 2.2 2
Documentation on the Web 3
About the Displays in This Book 3

Chapter 2 • Working with Cases **5**
Creating New Cases 5
Searching Cases 7
Viewing Cases 8
Editing Cases 10
Adding Attachments 14
Adding, Editing, and Printing Comments 15

Chapter 3 • Working with Incidents **17**
Creating New Incidents 17
Finding Items Related to Unassigned Incidents 18
Editing Incidents 19
Adding Attachments 21
Adding, Editing, and Printing Comments 21

Chapter 4 • Working with Subjects **23**
New Subjects 23
Adding, Editing, and Printing Comments 25
Adding Attachments 26
Case Network Analysis 26

Chapter 1
Introduction

What's New in SAS Enterprise Case Management 2.2 . . . . **1**
Overview 1
New Features 1
Enhancements 2

Accessibility Features of SAS Enterprise Case Management 2.2 . . . . **2**
About the Accessibility Features 2
Accessibility Features of the Supported Browser 2
Known Accessibility Issues 2
Using SAS Enterprise Case Management 2.2 with JAWS 2

Documentation on the Web **3**

About the Displays in This Book **3**

What's New in SAS Enterprise Case Management 2.2

Overview

SAS Enterprise Case Management has a number of new features and enhancements.

New Features

SAS Enterprise Case Management has the following new features:

- You can now find cases and incidents that are related to unassigned incidents.
- You can add financial items associated with a case or incident and see summarized financial information.
- You can use case network analysis to investigate a subject by viewing a network of cases, subjects, and incidents that are related to that subject.
- You can keep track of tasks for a case by entering a task list.
- When creating subjects, you can identify one subject as identical to another.
- There is now SQL Server and Postgres database support.

Enhancements

The following features are enhanced:

- When working in comments for a case, incident, or subject, you can now print and edit the comments.
- You can now add a subject from a case and from an incident.

Accessibility Features of SAS Enterprise Case Management 2.2

About the Accessibility Features

SAS Enterprise Case Management 2.2 includes accessibility and compatibility features that improve product usability for users with disabilities, with exceptions noted here. These features are related to accessibility standards for electronic information technology that were adopted by the U.S. Government under Section 508 of the U.S. Rehabilitation Act of 1973, as amended, and recommended by the Worldwide Web Consortium (W3C) Web Accessibility Initiative (WAI).

Accessibility Features of the Supported Browser

The supported Web browser for SAS Enterprise Case Management is Microsoft Internet Explorer. For more information about the accessibility features of Internet Explorer, use the Index in the Internet Explorer Help to locate topics about accessibility.

Known Accessibility Issues

SAS Enterprise Case Management 2.2 contains the following additional known accessibility issues:

- Visual focus is maintained except in the following locations:
  - When using the keyboard to navigate the Actions menu, the visual focus does not follow keyboard navigation.
  - Keyboard navigation is supported within the application except that it is possible to change highlight focus of the main tabs without actually navigating to the tabs.
- The software requires that style sheets are enabled.

Using SAS Enterprise Case Management 2.2 with JAWS

- The expand and collapse arrows for panels are labeled incorrectly and are read as “Unlabeled zero button” by JAWS.
- Certain icons in the software are not correctly read by screen readers.

Documentation on the Web

Documentation for SAS Enterprise Case Management is available at **`http://support.sas.com/documentation/solutions/ecm/`**.

Userid: **sas**

Password: **ECMuser123**

About the Displays in This Book

Because SAS Enterprise Case Management is a highly configurable case management system, the displays shown in this book differ from those in the application at your site. For example, selection lists (drop-down lists, radio buttons, and check boxes) within the application are configured through user-defined reference tables. Therefore, the displays shown in this user's guide are for demonstration purposes only. For more information about configuring and customizing SAS Enterprise Case Management, see the *SAS Enterprise Case Management: Administrator's Guide*.

Chapter 2

Working with Cases

Creating New Cases **5**

Searching Cases **7**
Search Cases 7
Results 8

Viewing Cases **8**
Viewing Case Information 8
E-Filing 9
Adding Comments and Attachments to a Case 9

Editing Cases **10**
Editing the Case Activity Status 10
Editing Case Information 10
Adding a Task to the To-Do List 13
E-Filing 14
Adding Comments and Attachments to a Case 14
Searching the Web for Related Information 14
Saving the Edited Case 14

Adding Attachments **14**

Adding, Editing, and Printing Comments **15**

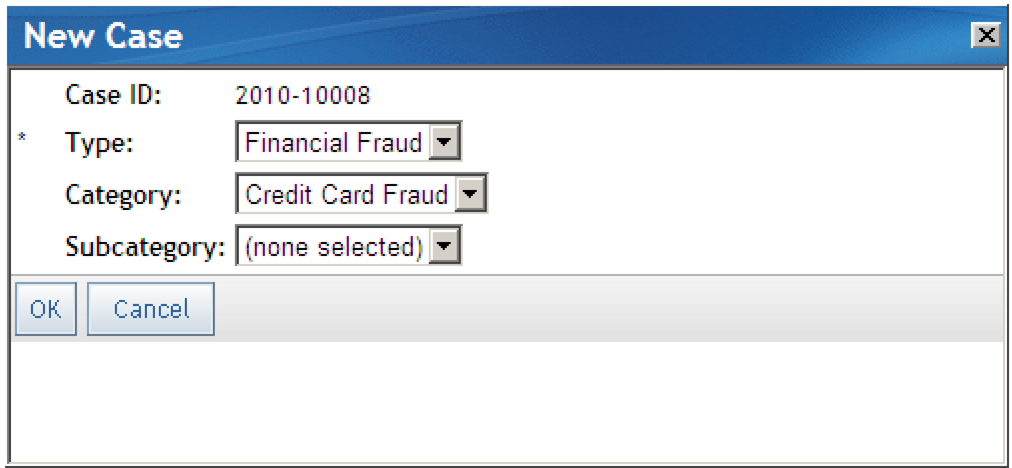
Creating New Cases

You can create new cases by selecting **New Case**  in SAS Enterprise Case Management. You can access the **New Case** function from the **Cases** tab or when you edit an incident.

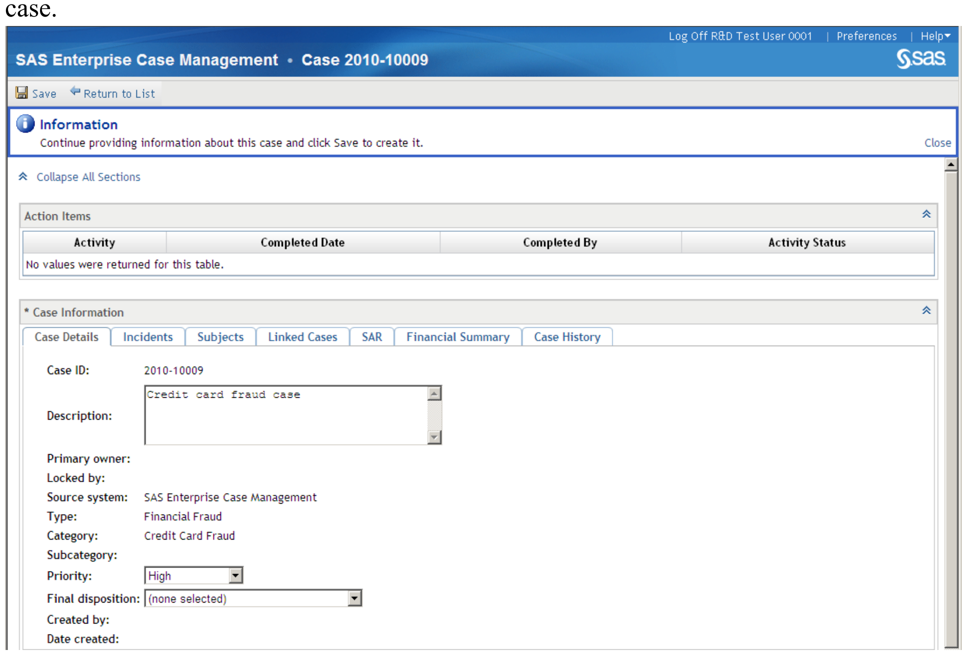
To create a new case:

1. Select the **New Case** button. The New Case dialog box opens.

2. Select the necessary information for the case and click **OK** to create the case.



The case is then opened for editing. You can continue to add information about this case.



3. When you are finished, select **Save** to create and save the case. The new case is then displayed in the list of available cases on the Results panel on the **Cases** tab.

4. Select **Return to List** to close the dialog box without saving the case.

Note: If you did not save the case before selecting **Return to List**, the **Save Changes** dialog box opens. Select **Yes** to save the case. Select **No** to not save the case and return to the Cases page, or select **Cancel** to continue entering information about the case.

Searching Cases

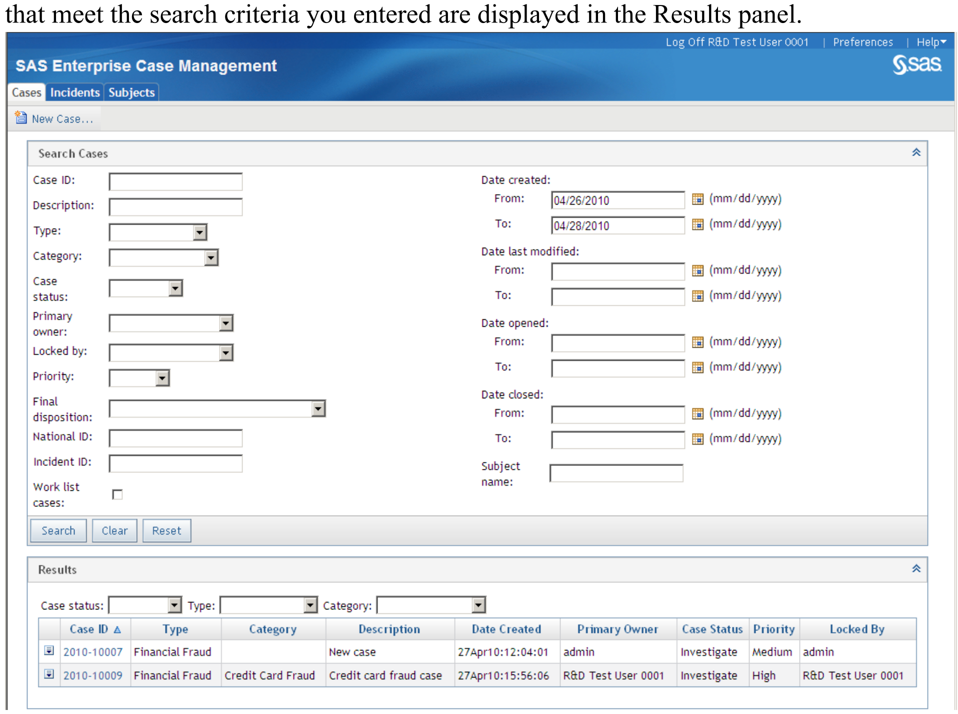
Search Cases

The Search Cases panel enables you to search for and quickly filter existing cases in SAS Enterprise Case Management. The **Search** function examines all available cases for those cases that meet the selected Search criteria. The search results are then shown in the Results panel.

The **Cases** tab is opened by default when you log on to SAS Enterprise Case Management. The Search Cases panel is closed by default when you first log on to SAS Enterprise Case Management. You can access and open the Search Cases panel by selecting **Expand** .

After you have opened the Search Cases panel, you can then enter information about the case that you are searching for. To search for a case:

1. Enter information in the text fields and select available case information such as the **Case Status** (The current status based on where the case is in the workflow) or the case **Type** from the drop-down boxes. You can also select a single value from each drop-down box.
2. After you have entered the information to search by, select **Search**. Any available cases that meet the search criteria you entered are displayed in the Results panel.



3. You can also clear the search fields by selecting **Reset**. The **Reset** function sets the search fields to the values that were last saved.
4. The **Clear** function clears all search fields.
5. After you have searched for the cases you need, you can reduce the Search Cases panel by selecting **Collapse**

Results

The Results panel displays a list of cases for investigation. By default, the Results panel shows the cases that are available to you. The **Search** function can modify the list of available cases that are displayed here. You can also filter the list of cases by selecting criteria from the available drop-down boxes on the Results panel. For example, you can select a variable from the **Case Status** (the current status based on where the case is in the workflow) or the case **Type** drop-down boxes. You can also sort on a column in the Results panel by selecting the heading label for a column.

If you have permission to edit cases, you can open a case by selecting it from the Results panel. You can then edit information about the case. In addition to selecting a case to open, you can perform tasks for a case by selecting Actions . This opens the Actions menu, which contains the following functions for a case.

View Case
: enables you to view the selected case. The case is opened and you can view the **Action Items** and **Case Information** for the case.

Edit Case
: enables you to edit the selected case. The case is opened and you can edit the **Action Items** and **Case Information** for the case.

Set Primary Owner
: if available for selection, enables you to reassign the selected case to another user.

Comments
: enables you add comments to the selected case.

Attachments
: enables you to add attachments to the selected case.

Lock and **Unlock**
: selecting **Lock** enables you to have exclusive editing access to the case. Your name then appears in the Locked By column in the Results panel. Selecting **Unlock** enables others to have editing access to the case.

Viewing Cases

Viewing Case Information

In SAS Enterprise Case Management, you can review cases in display-only mode by selecting **View Case** from the Actions menu on the Results panel for cases. When you select **View Case**, the selected case opens in display-only mode. You cannot make changes to the case while you are viewing the case. The case and the current status for the case are displayed. On this page, you can view the related action items and case information for the case. The Action Items panel displays the activity status information for the case. The Case Information panel might display the following information for a case:

Case Details
: displays the details for a case.

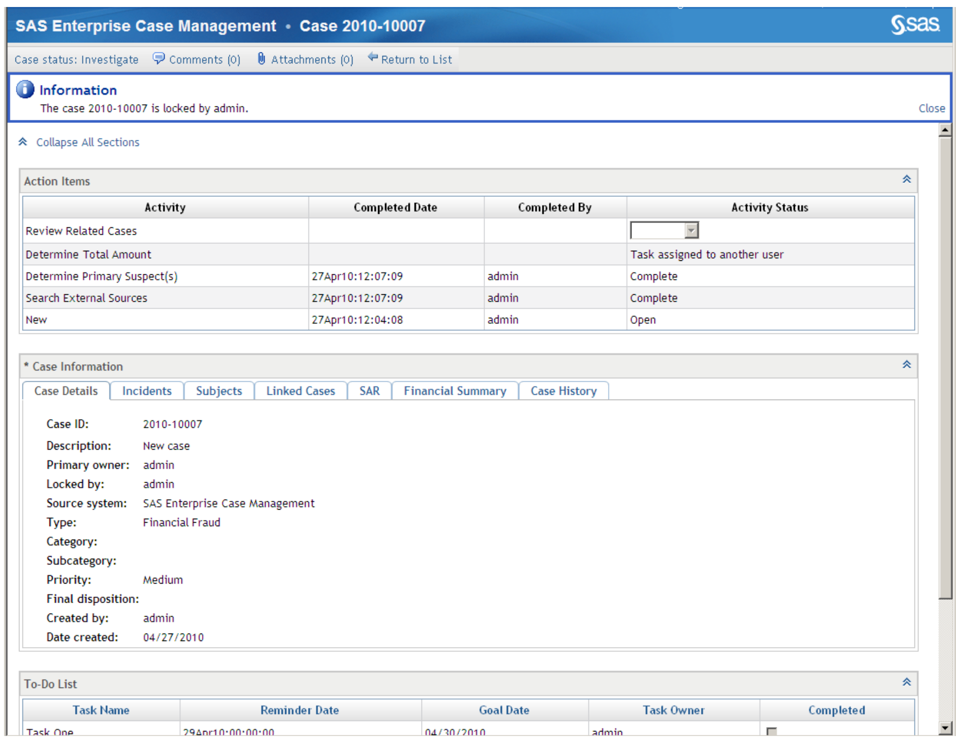
Incidents
: displays the incidents related to the case.

Subjects
displays the subjects related to the case.

Linked Cases
displays a list of any other cases that are related to this case.

SAR
displays financial institution reporting information for the case.

Case History
displays the activity history for the case.



E-Filing

This function enables you to preview a report for the case you are editing. Select **Preview Report** to see a preliminary E-Filing report for the case.

Adding Comments and Attachments to a Case

Although you cannot make changes to the case while you are viewing it, you can add comments and attachments to the case.

Comments
You can add comments by selecting **Comments**. The Comments dialog box opens enabling you to add and view comments.

Attachments
You can add attachments by selecting **Attachments**. The Attachments dialog box opens enabling you to add and view attachments.

Editing Cases

Editing the Case Activity Status

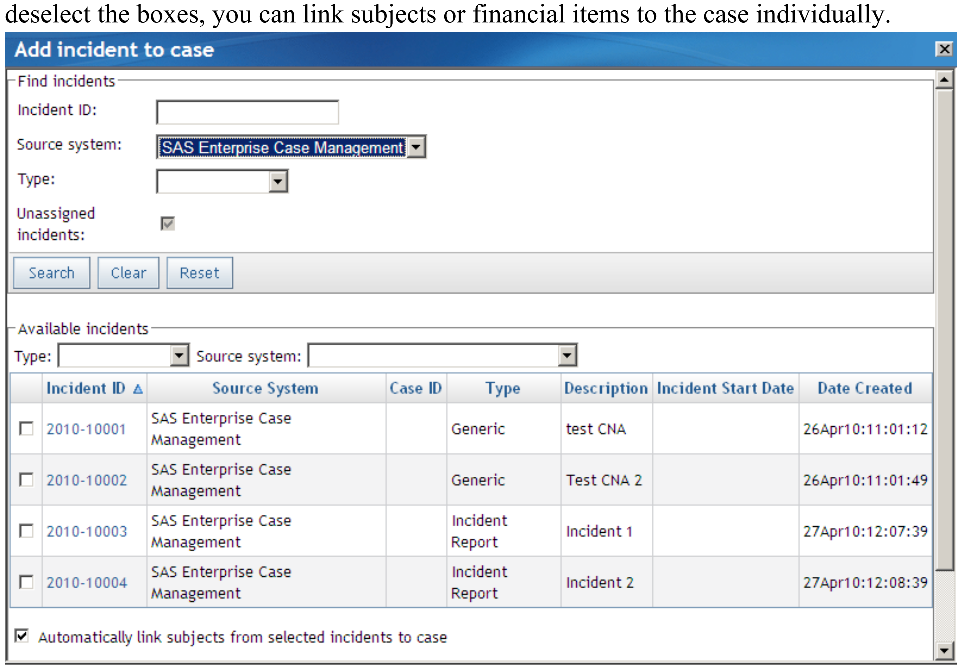
In SAS Enterprise Case Management, you can edit a case by selecting **Edit Case** from the Actions menu on the Results panel for cases. When you select **Edit Case**, the selected case opens. You can then make any needed changes to the case. The case and the case status for the case are displayed. On this page, you can update the case status on the Action Items panel. The Action Items panel displays the activity status information for the case. To update the status for an activity, select a status option from the **Activity Status** drop-down box.

Editing Case Information

You can update information for a case on the Case Information panel. The Case Information panel contains various items that you can modify. The following information can be edited for a case:

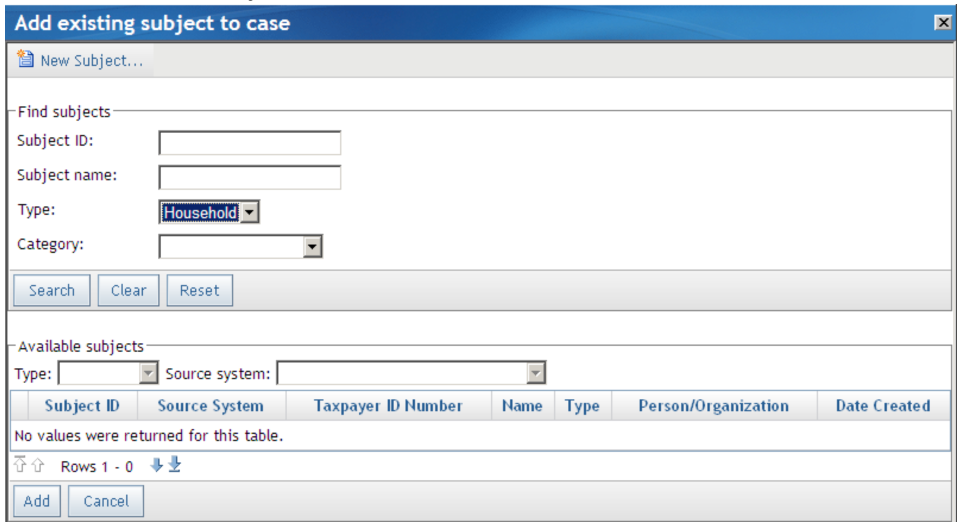
Case Details
: enables you to edit the details for a case.

Incidents
: displays the incidents related to the case. You can also add an existing incident to the case by selecting **Add incident to case**. This opens the Add incident to case dialog box. Enter the search criteria, and then click **Search**. Select an incident from the Available incidents section, and then click **Add**. There are options to automatically link all the subjects or financial items from the incident you have selected to the case. If you deselect the boxes, you can link subjects or financial items to the case individually.



Subjects
: displays the subjects related to the case. You can also add an existing subject to the case by clicking **Add existing subject to case** . This opens the Add existing subject

to case dialog box. Enter the search criteria, and then click **Search**. Select a subject from the Available subjects section, and then click **Add**.



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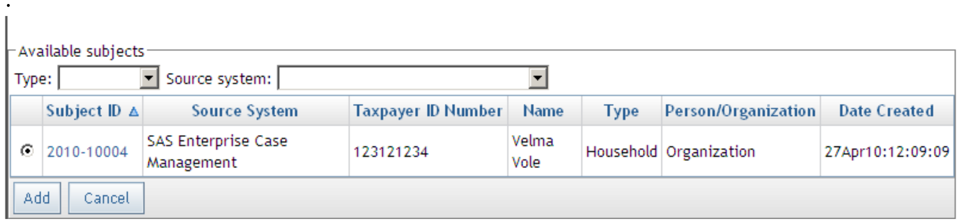
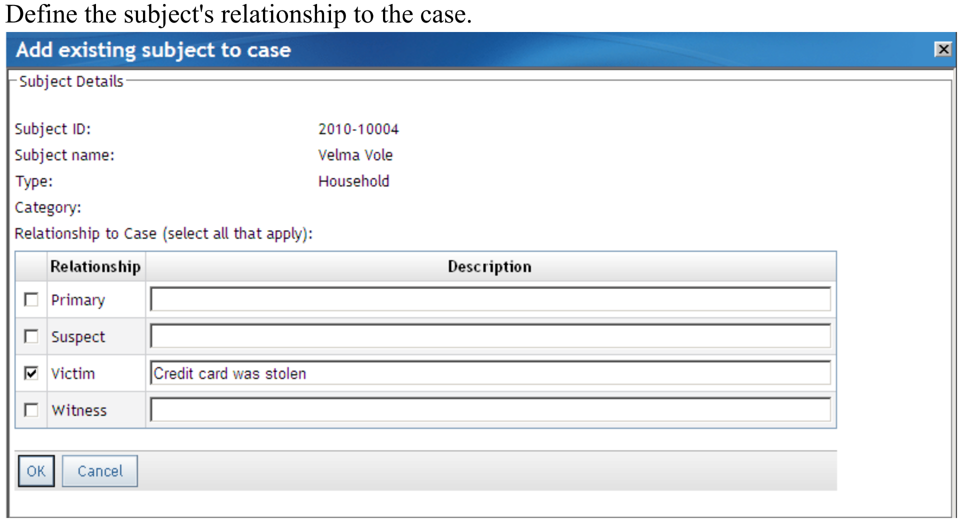


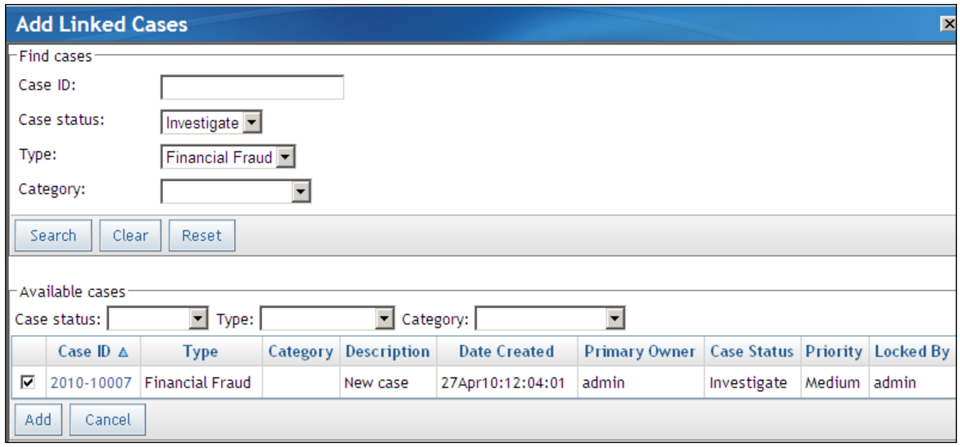
Define the subject's relationship to the case.



To add a new subject and information associated with it, click **Add new subject to case** . This opens the New Subject dialog box. The subject you add is automatically associated with this case.

Linked Cases

displays a list of other cases that are linked to this case. You can also add an existing, related case by selecting **Add Linked Cases**. This opens the Add Linked Cases dialog box. Enter the search criteria, and then click **Search**. Select a case from the Available cases section, and then click **Add**.



SAR

enables you to enter financial institution reporting information for the case.

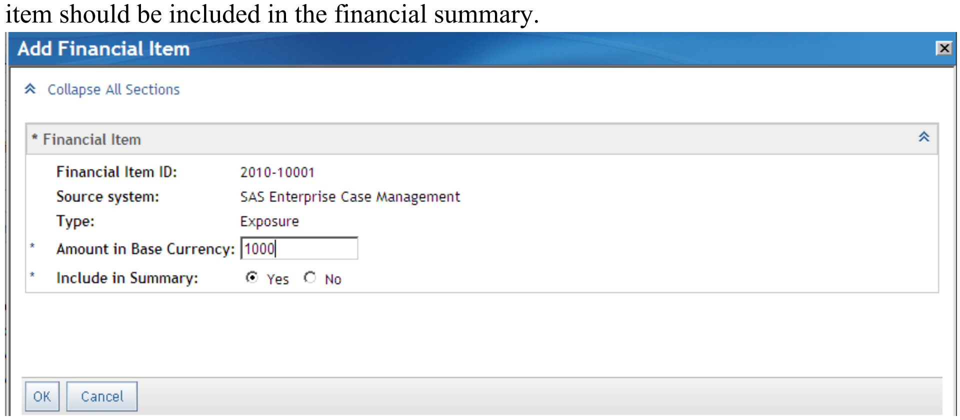
Case History

displays the activity history for the case.

Financial Summary

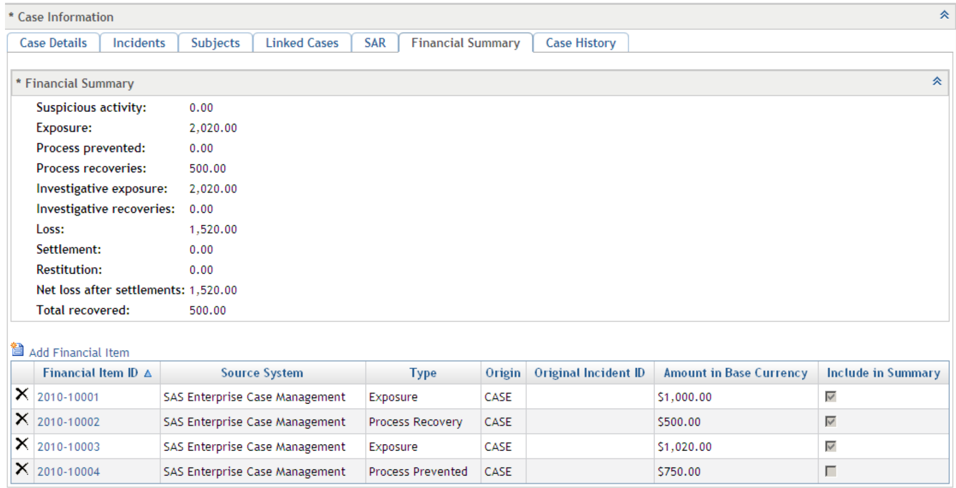
displays the list of financial items associated with this case and a summary of the financial amounts. When financial items are added, edited, or deleted from the Financial Items table, the summary information is automatically recomputed.

To add a financial item, click **Add Financial Item** . Identify the type of financial item, the amount, and any other required information. Indicate whether this financial item should be included in the financial summary.



The item is now listed in the financial summary. Delete financial items by clicking

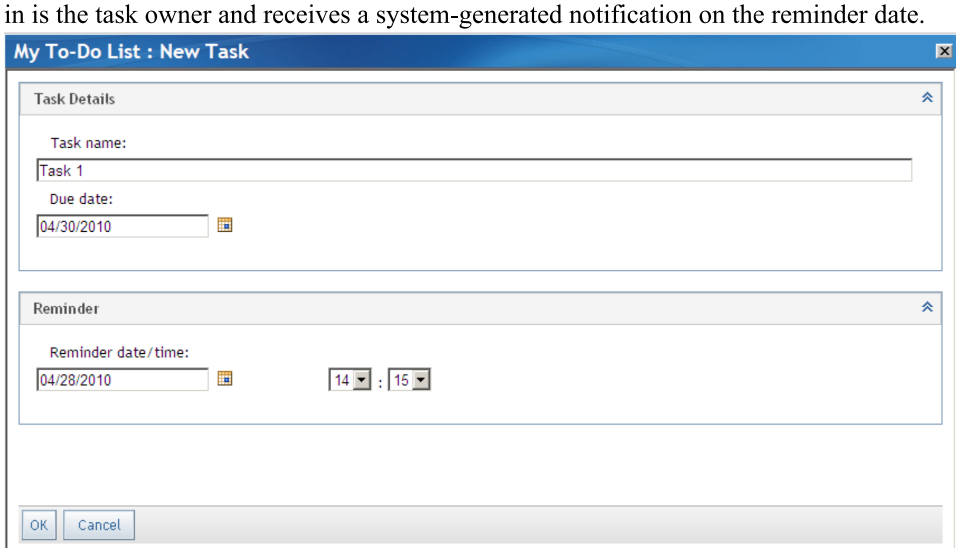
Delete ✕.



Note: Financial items that are added or edited at the incident level after the incident is added to a case are not displayed or summarized at the case level. If an incident is removed from a case, the financial items that were added to the case from that incident will remain.

Adding a Task to the To-Do List

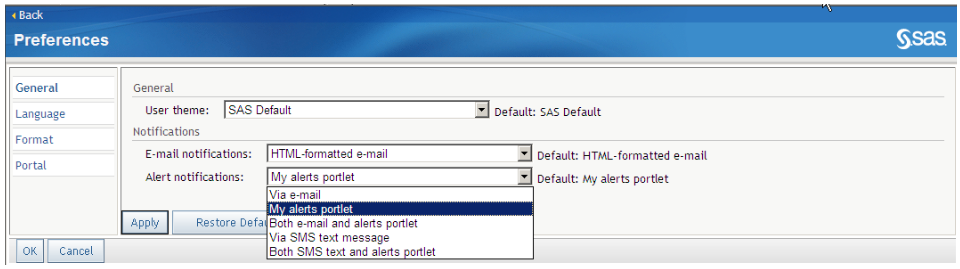
You can create a list of tasks for a case. To create a task, click **Add Task** and fill in **Task Name**, **Due date**, and **Reminder date/time** (optional), where you can specify the date and time you would like to receive a reminder notification. The person who is logged in is the task owner and receives a system-generated notification on the reminder date.



Click **Delete** ✕ to delete completed tasks.

Note: Each time you click on a URL in an e-mail alert notification, a new tab is opened in a browser window. Make sure that you close the tabs after you log off SAS Enterprise Case Management.

To set your preferences for notifications, click **Preferences** at the top right corner of the application window. Options on the General panel enable you to set how you want notifications sent and how you want your e-mails formatted.



E-Filing

This function enables you to preview or submit a report for the case you are editing. Select **Preview Report** to see a preliminary E-Filing report for the case. Select **Submit Report** to submit the E-Filing report.

Adding Comments and Attachments to a Case

In addition to editing the case, you can add comments and attachments to the case.

Comments
: You can add comments by selecting **Comments**. The Comments dialog box opens enabling you to add and view comments. For more information, see "Adding, Editing, and Printing Comments" on page 15.

Attachments
: You can add attachments by selecting **Attachments**. The Attachments dialog box opens enabling you to add and view attachments. For more information, see "Adding Attachments" on page 14.

Searching the Web for Related Information

When you are editing a case, you can access your Web browser by selecting the **Web Search** function. This opens your Web browser, where you can search for information that is related to the case.

Saving the Edited Case

When you are finished editing the case, select **Save** to save the changes you have made (excluding the items in the Actions Items panel). The case will be updated with the message **Case saved successfully**. To save the items in the Action Items panel, click **Save Case and Action Items**.

Select **Return to List** to go back to the list of available cases.

Adding Attachments

When you are working in SAS Enterprise Case Management, it might be necessary to add supporting documents to a case, incident, or subject. You can add file attachments with the **Attachments** function, which you can access when you are editing a case, incident, or subject. You can also access the **Attachments** function from the Actions menu on the Results panel for a case, incident or subject. Follow these steps to add an attachment:

1. Select **Attachments**. The Attachments dialog box opens.
2. On the Add Attachments panel, enter the location and name of the file that you are attaching. You can also select the **Browse** button to locate the file.
3. If needed, enter a text description of the file that you are attaching in the **Description** box.
4. Select the **Commit Attachments** button. This saves the attachment to the selected item. The following message then appears:

   ```
   File "xxx" was successfully uploaded
   ```

   The attachment is then listed in the Attachments panel.
5. The Attachments panel lists all attachments that are added to the item. If you select an attachment from the panel, the attachment opens in a new dialog box. If needed, you can delete an attachment by selecting the **Delete Attachment** button ✕ that is listed by the attachment.
6. When you are finished adding or deleting attachments, select **Close** to exit the Attachments dialog box.

Adding, Editing, and Printing Comments

When you are working in SAS Enterprise Case Management, it might be necessary to add supporting comments to a case, incident, or subject. You can add, view, edit, or print comments with the **Comments** function, which you can access when you are editing a case, incident, or subject. You can also access the **Comments** function from the Actions menu on the Results panel for a case, incident, or subject.

To add a comment:

1. Select **Comments**. The Comments dialog box opens.
2. In the **Subject** box, enter a description of the comment that you are adding.
3. Enter your comment text in the **Comment** box.
4. Click **Add Comment**. This saves the comment to the selected item. The comment is then listed in the Comments dialog box.

To view, edit, and print comments:

1. The Comments dialog box lists all comments that are added to the item. You can view a comment by selecting **View Comment** from the Actions menu. If you select **View Comment**, the comment opens in the Comments dialog box. After viewing the comment, click **Return to Comments** to close the view and return to the Comments dialog box.
2. To edit your comment text or subject, select **Edit** from the Actions menu. Click **Save** to save your edits.
3. To print all comments for a case, incident, or subject, click **Print all Comments**. Another window appears with the comments. From the **File** menu, select **Print**. You can then select a printer and click **Print** .

If needed, you can delete a comment by selecting **Delete Comment** from the Actions menu by the comment.

When you are finished, exit the Comments dialog box.

Chapter 3

Working with Incidents

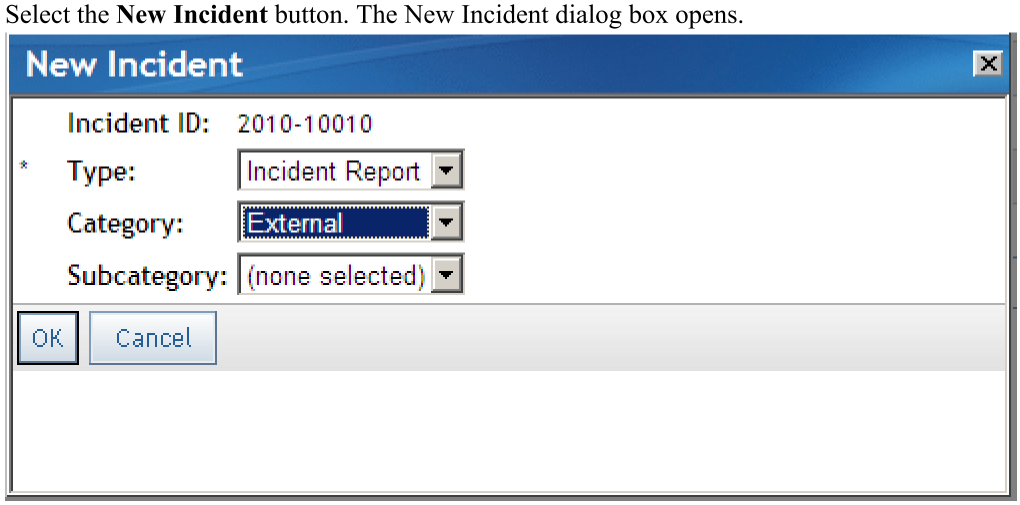
Creating New Incidents 17
Editing Incidents 19
Adding Attachments 21
Adding, Editing, and Printing Comments 21

Creating New Incidents

You can create new incidents by selecting **New Incident**  in SAS Enterprise Case Management. You can access the **New Incident** function from the **Incidents** tab.

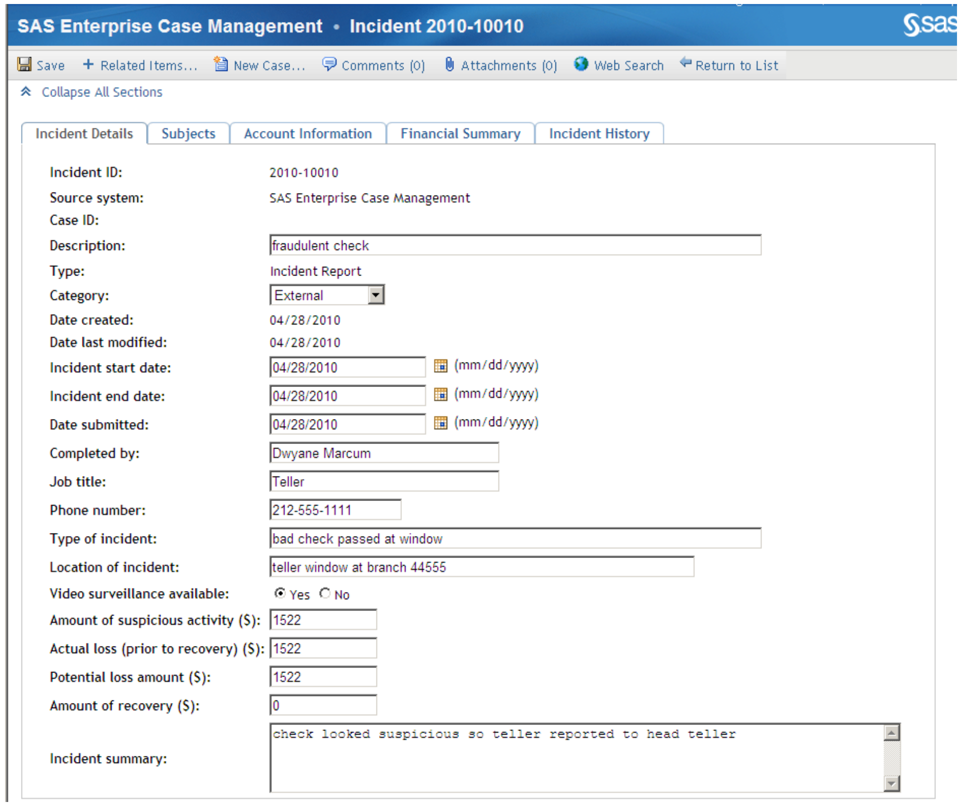
To create a new incident:

1. Select the **New Incident** button. The New Incident dialog box opens.



2. Select the necessary information for the incident.

3. Select **OK** to create the incident. The incident is then opened for you to edit. You can continue to add information about this incident.



4. When you are finished, select **Save** to create and save the incident. The new incident is then displayed in the list of available incidents on the Results panel on the **Incidents** tab.

5. Select **Return to List** to close the dialog box without saving the incident.

Note: If you did not save the incident before selecting **Return to List**, the Save Changes dialog box opens. Select **Yes** to save the incident. Select **No** to not save the incident and return to the Incidents page, or select **Cancel** to continue entering information about the incident.

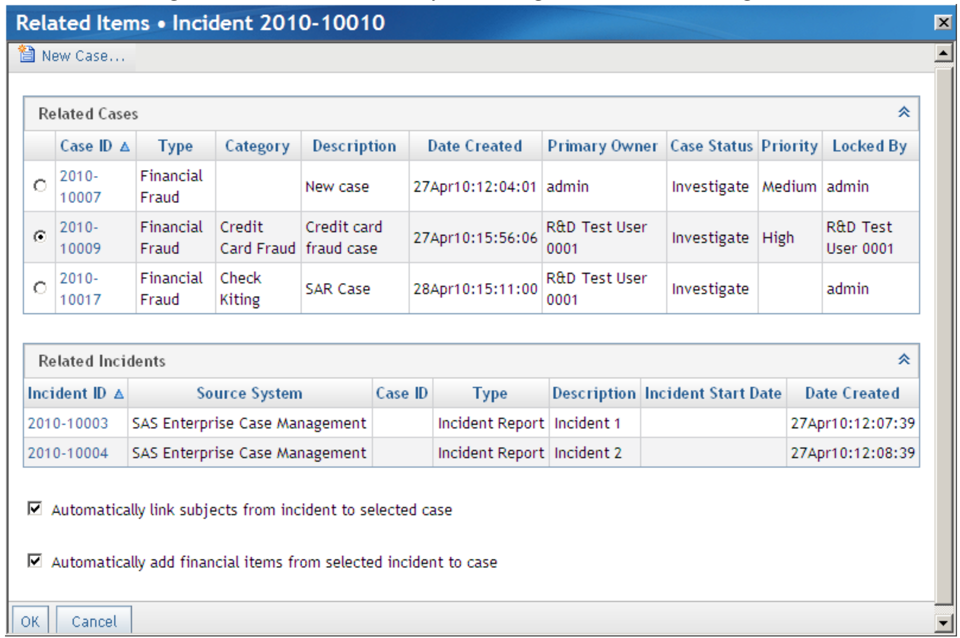
Finding Items Related to Unassigned Incidents

You can find cases and other incidents that are related to unassigned incidents. The cases and incidents might be related to the unassigned incident by a subject's national ID number or other criteria that were established at your site. You can then link the unassigned incident to an existing case. If there are no related cases that you want to link to, you can open a new case and link related incidents to it. To link an unassigned incident to an existing case from the **Incidents** tab:

1. Select **Related Items** + from the Actions menu on the Results panel. You can also select **Related Items** + while viewing an individual incident. The Related Items dialog box opens.

2. View related cases by clicking **Case IDs**. Sort information for related cases by clicking on the respective column names.

3. Link the unassigned incident to a case by selecting a case and clicking **OK**.


Related Items • Incident 2010-10010

New Case…

Related Cases

	Case ID	Type	Category	Description	Date Created	Primary Owner	Case Status	Priority	Locked By
○	2010-10007	Financial Fraud		New case	27Apr10:12:04:01	admin	Investigate	Medium	admin
◉	2010-10009	Financial Fraud	Credit Card Fraud	Credit card fraud case	27Apr10:15:56:06	R&D Test User 0001	Investigate	High	R&D Test User 0001
○	2010-10017	Financial Fraud	Check Kiting	SAR Case	28Apr10:15:11:00	R&D Test User 0001	Investigate		admin

Related Incidents

Incident ID	Source System	Case ID	Type	Description	Incident Start Date	Date Created
2010-10003	SAS Enterprise Case Management		Incident Report	Incident 1		27Apr10:12:07:39
2010-10004	SAS Enterprise Case Management		Incident Report	Incident 2		27Apr10:12:08:39

☑ Automatically link subjects from incident to selected case

☑ Automatically add financial items from selected incident to case

OK Cancel

Note: The options **Automatically link subjects from incident to selected case** and **Automatically add financial items from selected incident to case** are selected by default. Deselect the boxes if you want to link the subjects and financial items from the unassigned incident individually.

To view related incidents, open a new case in the Related Items dialog box and link related incidents to it:

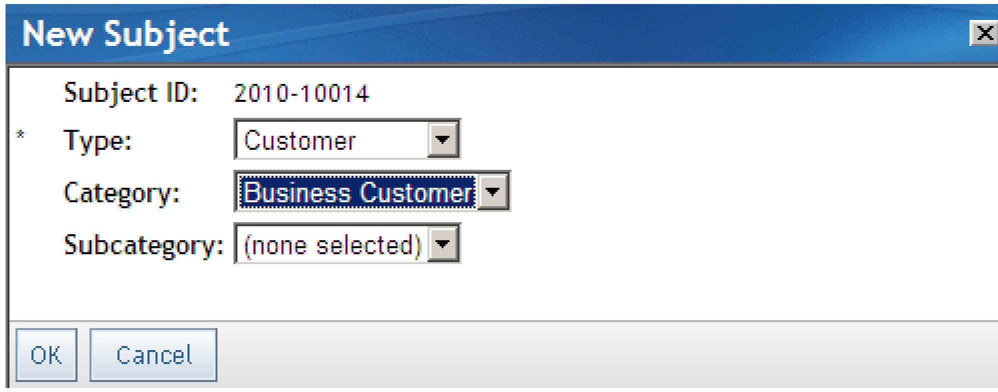
1. View related incidents by clicking **Incident IDs**. Sort information for related incidents in the dialog box by clicking on the respective column names. Record the incident IDs of the related incidents that you want to link to a new case.
2. Click **New Case** in the Related Items dialog box and create a case. Save the case.
3. Return to the list of unassigned incidents on the Results panel. Select an incident that you recorded earlier in the Related Items dialog box.
4. Follow the previous instructions for linking an unassigned incident to a case. The case that you entered earlier now appears as a selection in the Related Items dialog box.
5. Repeat the process until you have linked all of the unassigned incidents that you recorded earlier in the Related Items dialog box.

Editing Incidents

Incident Details
: enables you to edit the details for an incident.

Subjects
: displays the subjects related to the incident. You can also add an existing subject to the incident by selecting **Add existing subject to incident**. This opens the Add subject to incident dialog box.

To add a new subject and information associated with it, click Add new subject to incident. This opens the New Subject dialog box.

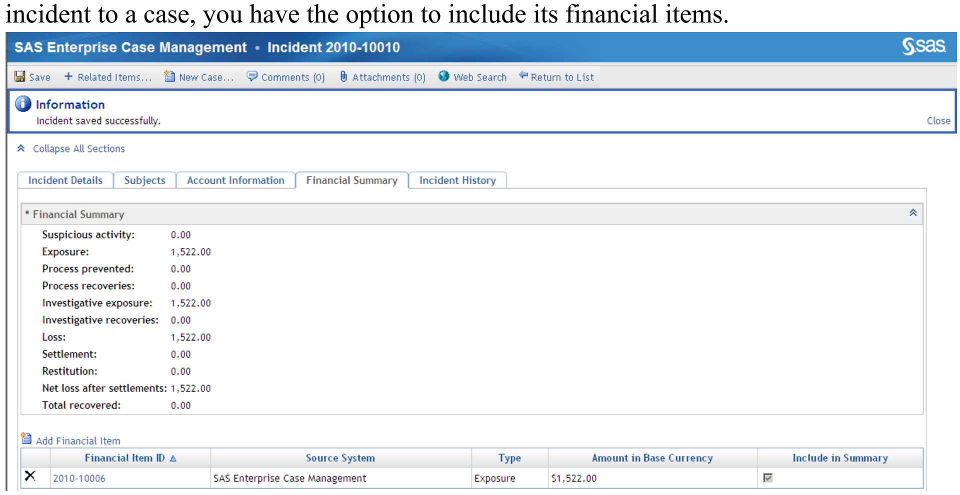


The subject that you add is automatically associated with this incident.

Account Information
enables you to enter account details and transaction information for the incident. On the Account Details panel, enter account information. The Transactions panel displays all existing transactions for the incident. Select **Add Transaction** to open the Add Transaction dialog box and create a new transaction. On the Transactions panel, the Actions menu enables you to view, edit, or delete a transaction.

Financial Summary
displays the list of financial items associated with this incident and a summary of the financial amounts. When financial items are added, edited, or deleted from the Financial Items table, the summary information is automatically recomputed.

To add a financial item to an incident, Click **Add Financial Item**. Identify the type of financial item, the amount, and any other required information. Indicate whether this financial item should be included in the financial summary. When you assign the incident to a case, you have the option to include its financial items.



Delete financial items by clicking **Delete**.

Incident History
displays the activity history for the incident.

Adding Attachments

When you are working in SAS Enterprise Case Management, it might be necessary to add supporting documents to a case, incident, or subject. You can add file attachments with the **Attachments** function, which you can access when you are editing a case, incident, or subject. You can also access the **Attachments** function from the Actions menu on the Results panel for a case, incident or subject. Follow these steps to add an attachment:

1. Select **Attachments**. The Attachments dialog box opens.
2. On the Add Attachments panel, enter the location and name of the file that you are attaching. You can also select the **Browse** button to locate the file.
3. If needed, enter a text description of the file that you are attaching in the **Description** box.
4. Select the **Commit Attachments** button. This saves the attachment to the selected item. The following message then appears:

   ```
   File "xxx" was successfully uploaded
   ```

   The attachment is then listed in the Attachments panel.
5. The Attachments panel lists all attachments that are added to the item. If you select an attachment from the panel, the attachment opens in a new dialog box. If needed, you can delete an attachment by selecting the **Delete Attachment** button that is listed by the attachment.
6. When you are finished adding or deleting attachments, select **Close** to exit the Attachments dialog box.

Adding, Editing, and Printing Comments

When you are working in SAS Enterprise Case Management, it might be necessary to add supporting comments to a case, incident, or subject. You can add, view, edit, or print comments with the **Comments** function, which you can access when you are editing a case, incident, or subject. You can also access the **Comments** function from the Actions menu on the Results panel for a case, incident, or subject.

To add a comment:

1. Select **Comments**. The Comments dialog box opens.
2. In the **Subject** box, enter a description of the comment that you are adding.
3. Enter your comment text in the **Comment** box.
4. Click **Add Comment**. This saves the comment to the selected item. The comment is then listed in the Comments dialog box.

To view, edit, and print comments:

1. The Comments dialog box lists all comments that are added to the item. You can view a comment by selecting **View Comment** from the Actions menu. If you select

View Comment , the comment opens in the Comments dialog box. After viewing the comment, click **Return to Comments** to close the view and return to the Comments dialog box.

2. To edit your comment text or subject, select **Edit** from the Actions menu. Click **Save** to save your edits.

3. To print all comments for a case, incident, or subject, click **Print all Comments**. Another window appears with the comments. From the **File** menu, select **Print**. You can then select a printer and click **Print** .

If needed, you can delete a comment by selecting **Delete Comment** from the Actions menu by the comment.

When you are finished, exit the Comments dialog box.

Chapter 4

Working with Subjects

New Subjects **23**
Creating New Subjects 23
Linking Identical Subjects 24
Adding, Editing, and Printing Comments **25**
Adding Attachments **26**
Case Network Analysis **26**
Accessing Case Network Analysis 26
Navigating within the Network 27
Using the Toolbar 28
Printing and Exiting 29

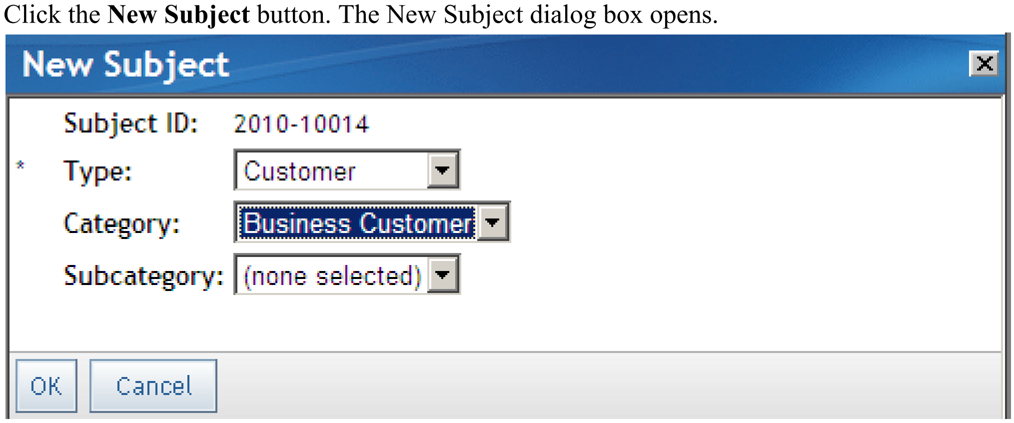
New Subjects

Creating New Subjects

You can create new subjects by selecting **New Subject**  in SAS Enterprise Case Management. You can access the **New Subject** function from the **Subjects** tab.

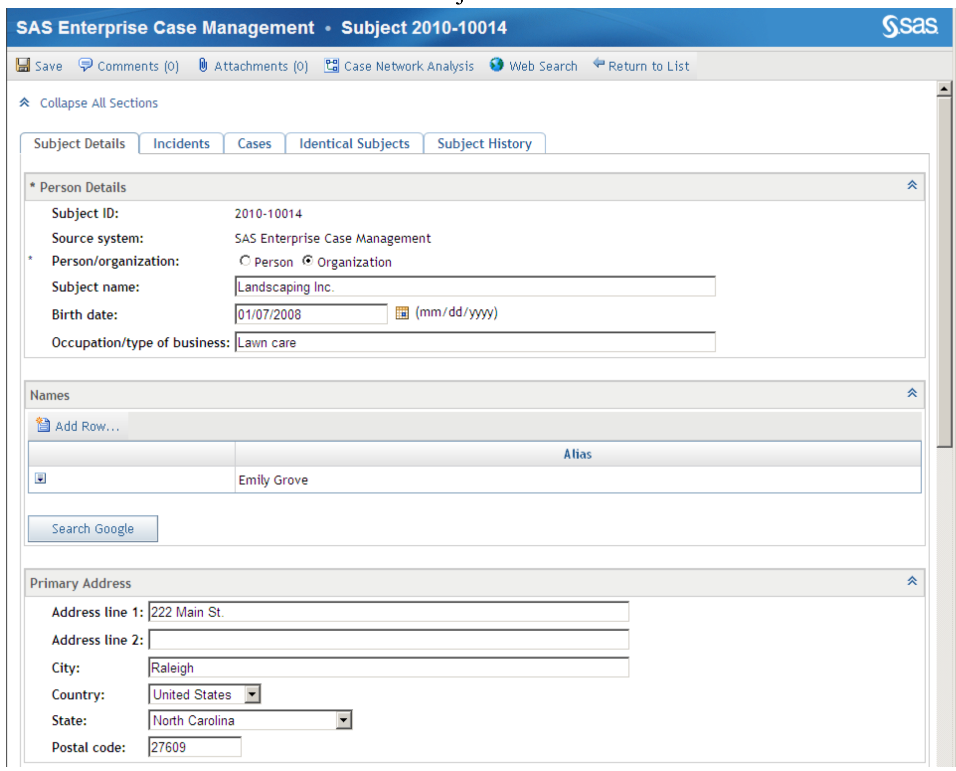
To create a new subject:

1. Click the **New Subject** button. The New Subject dialog box opens.



2. Select the necessary information for the subject.

3. Select **OK** to create the subject. The subject is then opened for you to edit. You can continue to add information about this subject.



4. When you are finished, select **Save** to create and save the subject.

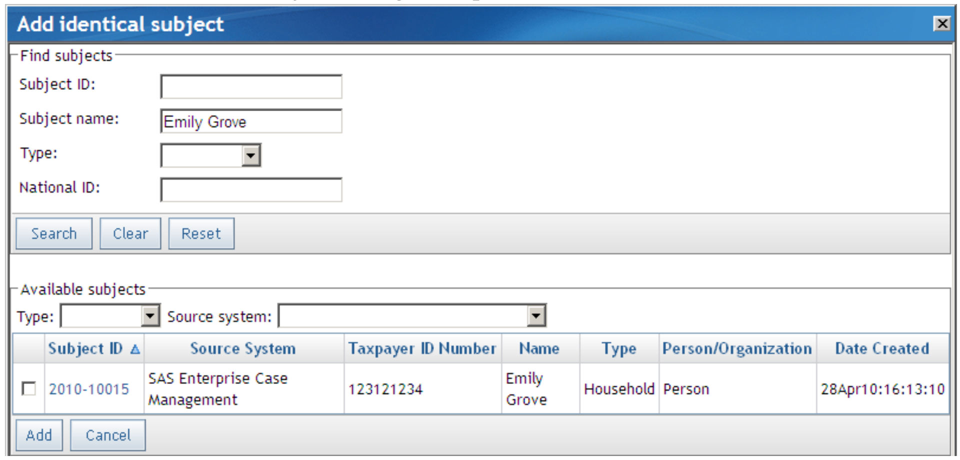
5. Select **Return to List** to close the dialog box without saving the subject.

Note: If you did not save the subject before selecting **Return to List**, the Save Changes dialog box opens. Select **Yes** to save the subject. Select **No** to not save the subject and return to the Subjects page, or select **Cancel** to continue entering information about the subject.

Linking Identical Subjects

When you enter a subject you can link other subjects to it, indicating that they identify the same person. For example, if you are entering subject Mary Jane Moyers and you know she is already in the system as M. J. Moyers, you can enter M. J. Moyers as an identical subject.

1. In the Subject window, select the **Identical Subjects** tab. Click **Add identical subject** . The Add identical subject dialog box opens.



2. Search for subjects in the top portion of the dialog box. The results appear at the bottom of the dialog box.
3. Select the desired subjects and click **Add** to add them as identical subjects. You are returned to the Subject window.
4. Save your changes. The identical subjects are added to this subject's history files.

Adding, Editing, and Printing Comments

When you are working in SAS Enterprise Case Management, it might be necessary to add supporting comments to a case, incident, or subject. You can add, view, edit, or print comments with the **Comments** function, which you can access when you are editing a case, incident, or subject. You can also access the **Comments** function from the Actions menu on the Results panel for a case, incident, or subject.

To add a comment:

1. Select **Comments**. The Comments dialog box opens.
2. In the **Subject** box, enter a description of the comment that you are adding.
3. Enter your comment text in the **Comment** box.
4. Click **Add Comment**. This saves the comment to the selected item. The comment is then listed in the Comments dialog box.

To view, edit, and print comments:

1. The Comments dialog box lists all comments that are added to the item. You can view a comment by selecting **View Comment** from the Actions menu. If you select **View Comment** , the comment opens in the Comments dialog box. After viewing the comment, click **Return to Comments** to close the view and return to the Comments dialog box.
2. To edit your comment text or subject, select **Edit** from the Actions menu. Click **Save** to save your edits.

3. To print all comments for a case, incident, or subject, click **Print all Comments** . Another window appears with the comments. From the **File** menu, select **Print**. You can then select a printer and click **Print** .

If needed, you can delete a comment by selecting **Delete Comment** from the Actions menu by the comment.

When you are finished, exit the Comments dialog box.

Adding Attachments

When you are working in SAS Enterprise Case Management, it might be necessary to add supporting documents to a case, incident, or subject. You can add file attachments with the **Attachments** function, which you can access when you are editing a case, incident, or subject. You can also access the **Attachments** function from the Actions menu on the Results panel for a case, incident or subject. Follow these steps to add an attachment:

1. Select **Attachments**. The Attachments dialog box opens.
2. On the Add Attachments panel, enter the location and name of the file that you are attaching. You can also select the **Browse** button to locate the file.
3. If needed, enter a text description of the file that you are attaching in the **Description** box.
4. Select the **Commit Attachments** button. This saves the attachment to the selected item. The following message then appears:

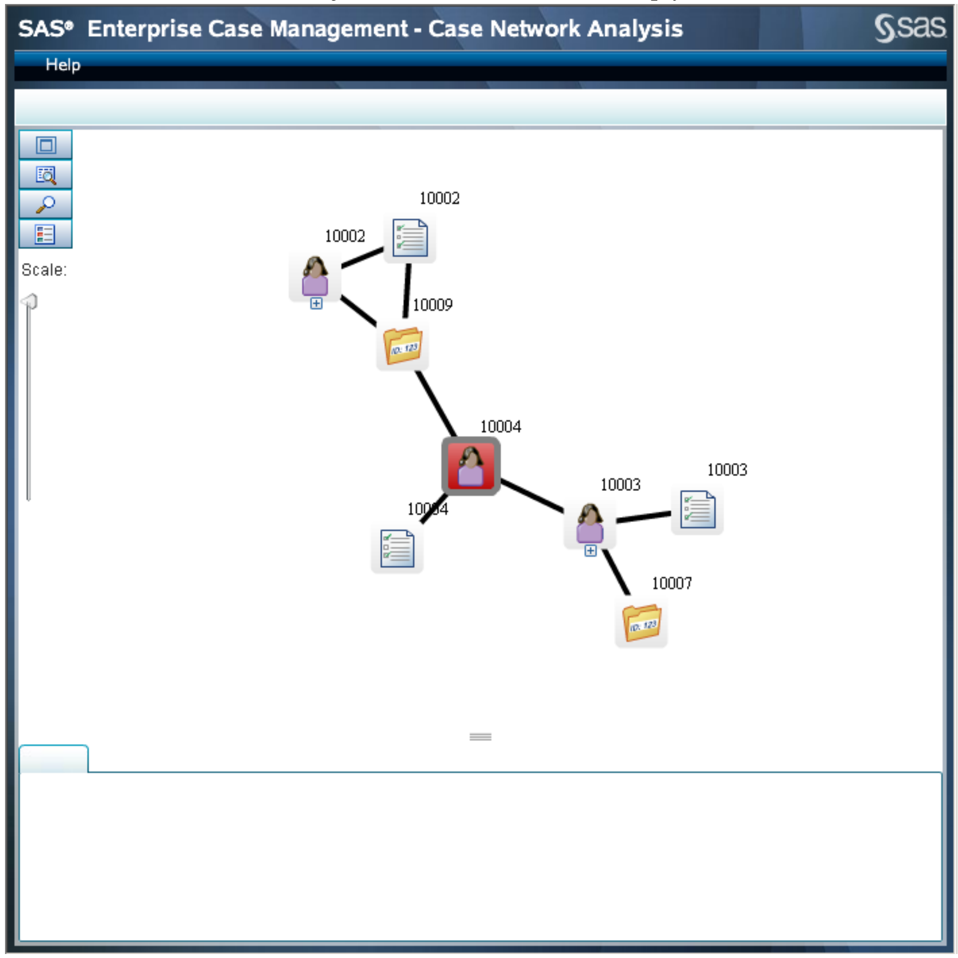
   ```
   File "xxx" was successfully uploaded
   ```

   The attachment is then listed in the Attachments panel.
5. The Attachments panel lists all attachments that are added to the item. If you select an attachment from the panel, the attachment opens in a new dialog box. If needed, you can delete an attachment by selecting the **Delete Attachment** button that is listed by the attachment.
6. When you are finished adding or deleting attachments, select **Close** to exit the Attachments dialog box.

Case Network Analysis

Accessing Case Network Analysis

You can investigate a subject by viewing a network of cases, subjects, and incidents that are related to that subject. The subjects can be related by national ID number or other criteria that were established at your site. To perform case network analysis, select **Case Network Analysis** from the Actions menu on the Results pane of the **Subjects** tab and the Subject Details page. The Enterprise Case Management – Case Network Analysis window opens and the network loads. The subject that you are analyzing is the root node and appears in red. The network first draws connectors from the root node to associated cases, associated incidents, or linked subjects. Connections are then made from the linked subject to associated cases or incidents to widen the network. If the subject has no related cases, related incidents, or linked subjects, the window remains empty.

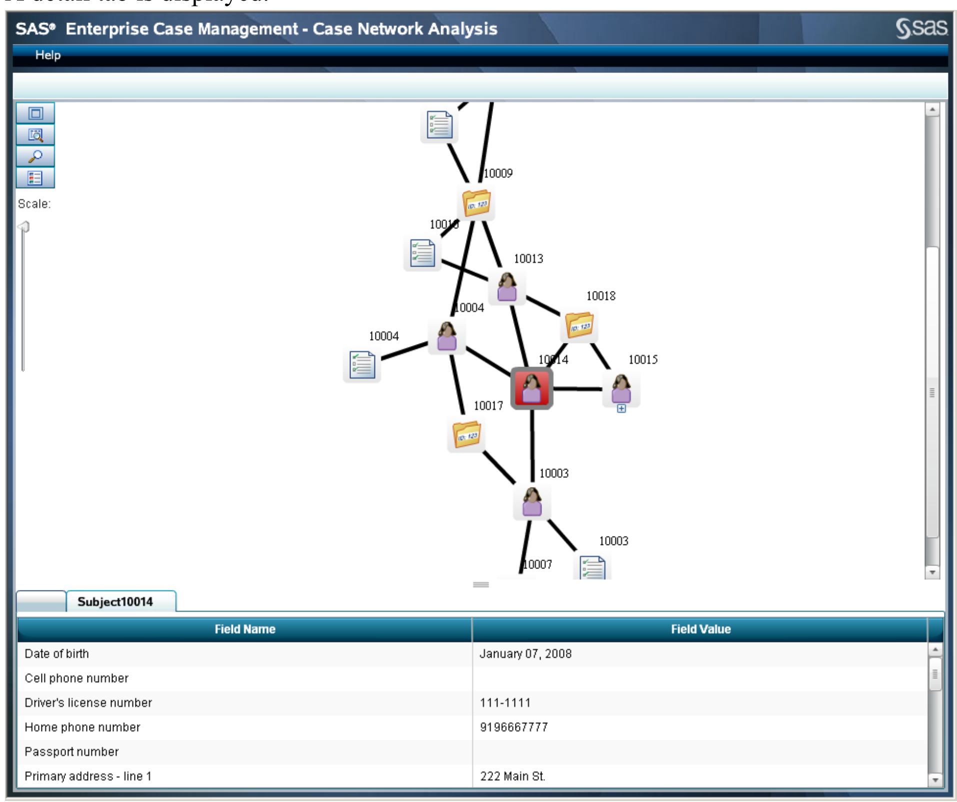


Navigating within the Network

Use the following techniques to navigate within the Case Network Analysis display:

- Zoom — To zoom in and out on the network itself, move the mouse wheel forward and backward.
- Move network — To move the entire network within the display, left-click in the white space around a network and then drag the network to a new location.
- Rotate network — To rotate the entire network within the display, hold down the CTRL key, left-click in the white space around a network, and move the cursor in a circular direction.
- Rearrange nodes — Select a node (single or grouped) to drag the node to a new location. Links are automatically rearranged when nodes are moved. You can drag nodes to see relationships more clearly.
- Hide/unhide and close tabs — Double-click in the white space around the network to hide any tabs that appear in the lower left of the Case Network Analysis display. This also maximizes the display area. Double-click again to make the tabs appear. Click on the white X within a red square on a tab to close it.

- Move tabs — Move a tab by selecting, dragging, and dropping it into a new position within the grouping of existing tabs.
- Resize Sections — Adjust the area at the bottom of the display that is devoted to tabs by clicking the separator bar and dragging it up or down.
- Expand — To expand a group of nodes, click the plus sign under the node. That node becomes the new reference point for relationships and can retrieve other items from the system. You can expand only subject nodes.
- View details — To view node details, click the chevron button that appears when your cursor hovers over a node and then select **Show Details**, or double-click the node. A detail tab is displayed.



- Hide nodes — To hide a node and its connector, place your cursor on a node to select the chevron button, and then select **Hide**.
- Scale — Adjust the size of network nodes by moving the **Scale** button along its slider. The **Scale** button and slider appear on the left side of the Case Network Analysis display. This is most useful when you are working with large and complex networks.

Using the Toolbar

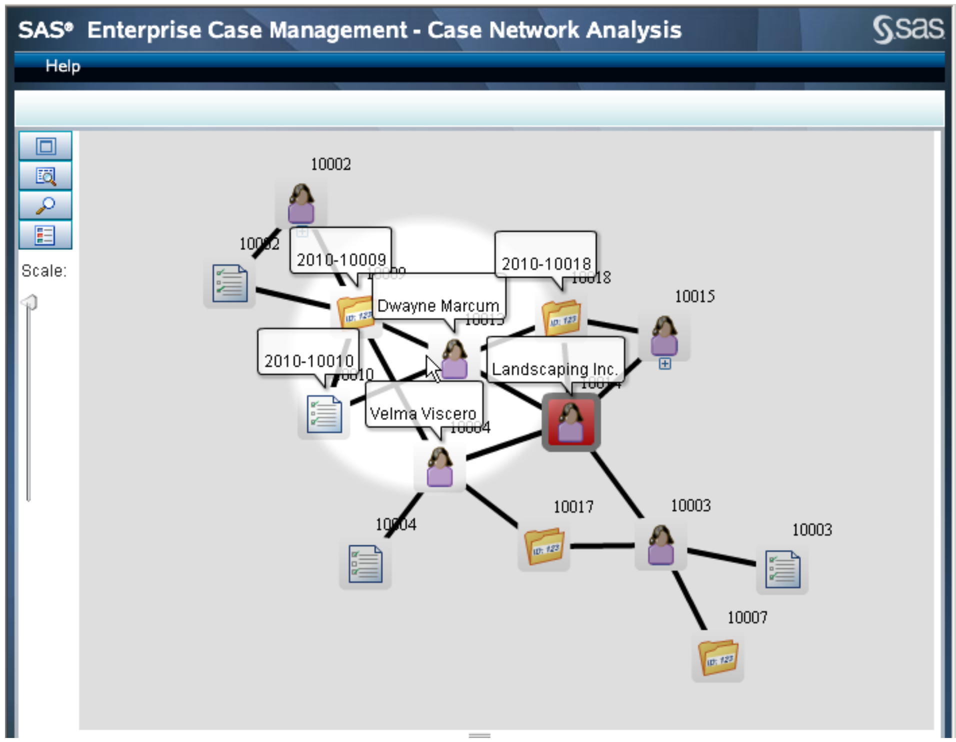
The toolbar buttons enable you change the views of the network.

Maximize/Restore Window
: maximizes the network viewing pane by hiding the node detail section of the display. Select the button again to restore the node detail section to the display.

Node ID
: toggles to make node IDs appear and disappear.

Searchlight 

toggles to highlight labels on user-selected nodes. Note that the labels are configurable. For more information, see the *SAS Enterprise Case Management: Administrator's Guide*.



Legend 

toggles to make the toolbar legend  appear and disappear.

Printing and Exiting

To print, right-click anywhere in the network and then select **Print**. To exit the network, close the window by clicking the X.

Your Turn

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