SAS® Enterprise Case Management 6.3

User's Guide

Second Edition

SAS® Documentation

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SAS® Enterprise Case Management 6.3: User's Guide, Second Edition

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About this Book

Audience

This book is intended for case investigators, auditors, and those responsible for financial reporting and fraud prevention.

About the Displays in this Book

Because SAS Enterprise Case Management is a highly configurable case management system, the displays shown in this book might 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*.

What's New in SAS Enterprise Case Management 6.3

Overview

SAS Enterprise Case Management has a number of new features related to searches and subjects.

New Features

SAS Enterprise Case Management has the following new features:

- The following usability features have been implemented:
  - Multi-column sorting has been enabled.
  - The last sort state is persisted for all grids.
  - Column re-ordering is maintained for all grids.
  - Quick access is available to a default landing page from anywhere in the application.
  - The powerful global search syntax is available when associating a subject with a case, incident, or another subject.
- Regulatory report fields can now be pre-filled from cases.
- Global search now includes the ability to search file attachments.
- Filters can be applied to global search results.
- Grid data can be exported to Microsoft Excel.
- The following improvements have been made to the notes interface:
  - filtering by topic, sorting by date, and optionally enforcing a predefined list of topics
  - in-line searching and filtering of notes on a case, incident, or subject

Enhancements

- The global search functionality has been enhanced as follows:

- Field names can be displayed in search results.
- The results layout is more compact and readable.

Accessibility

For information about the accessibility of this product, see Accessibility Features of SAS Enterprise Case Management at support.sas.com.

Chapter 1
Introduction

What is SAS Enterprise Case Management?

SAS Enterprise Case Management enables you to investigate incidents, attach documentation, and record exposure and losses for any type of financial crime that might pose a risk to your organization. You can use it to provide information for financial reporting, such as fraud losses, and as the primary resource for filing regulatory reports to government agencies. With the SAS Enterprise Case Management web application, you can perform the following tasks:

- search, create, and view subjects, incidents, cases, reports, and e-files
- create and manage case and subject task lists with reminders
- receive a notification when updates are made to specific cases, incidents, subjects, reports, or e-files
- view the audit trail of any object
- manage regulatory reporting to government agencies (e-filing)
- perform sophisticated case network analysis on a subject

Terminology

SAS Enterprise Case Management is customizable, which allows it to fit the business needs of a wide range of industries. Because of this level of customization, the terminology you use may be different from what is used in the SAS Enterprise Case Management documentation. The following table provides a list of some of the more commonly used terms found throughout the documentation, along with possible alternatives.

Term in Documentation	Alternative Terms
Case	Work Item, Project
Incident	Claim, Alert
Subject	Party, Participant, Household, Account, Drug

Documentation on the Web

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

User ID: **sas**

Password: **ECMuser123**

Chapter 2

Working with Cases

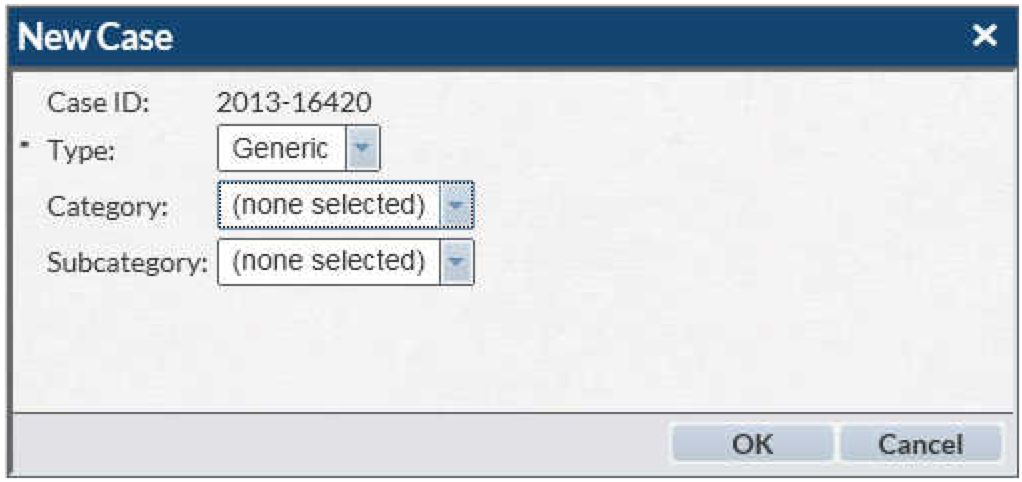
Creating New Cases

You can create new cases by selecting **New Case** from the **Cases** drop-down menu or when you edit an incident.

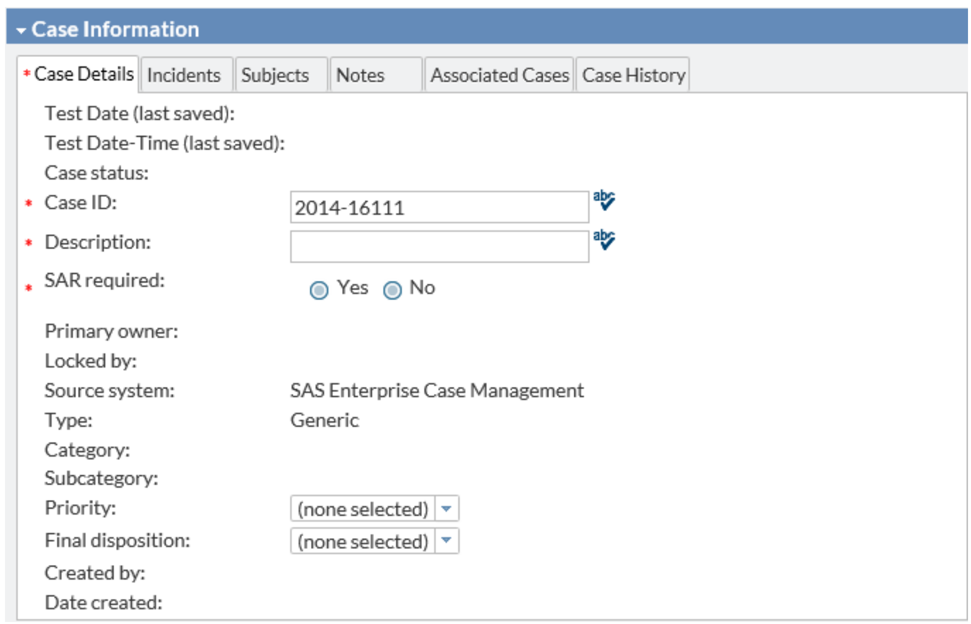
To create a new case:

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

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 to create and save the case. The new case is then displayed in the list of available cases on the **Results** pane of the Search Cases window.

4. Click to leave the window.

Note: If you did not save the case before selecting , the Save Changes dialog box appears. Click **Yes** to save the case. Click **No** to not save the case and return to the previous window, or click **Cancel** to continue entering information about the case.

Searching Cases

Search Options

There are two options for searching within SAS Enterprise Case Management. You can search broadly across entities by using the **Search** box found in the banner at the top of the window (known as global search). You can also search within a specific entity by using the search pane.

Search Box

For information about the **Search** box, see Chapter 7, “Global Search Box,” on page 39.

Search Cases Pane

For information about using the search pane, see Chapter 8, “Entity-Specific Searching,” on page 41.

Viewing Cases

Viewing Case Information

In SAS Enterprise Case Management, you can review cases in display-only mode by selecting **View** from the Actions menu ( ) on the **Results** pane for cases. When you select **View**, 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** pane displays the activity status information for the case. The **Case Information** pane 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.

Notes
displays the notes related to the case.

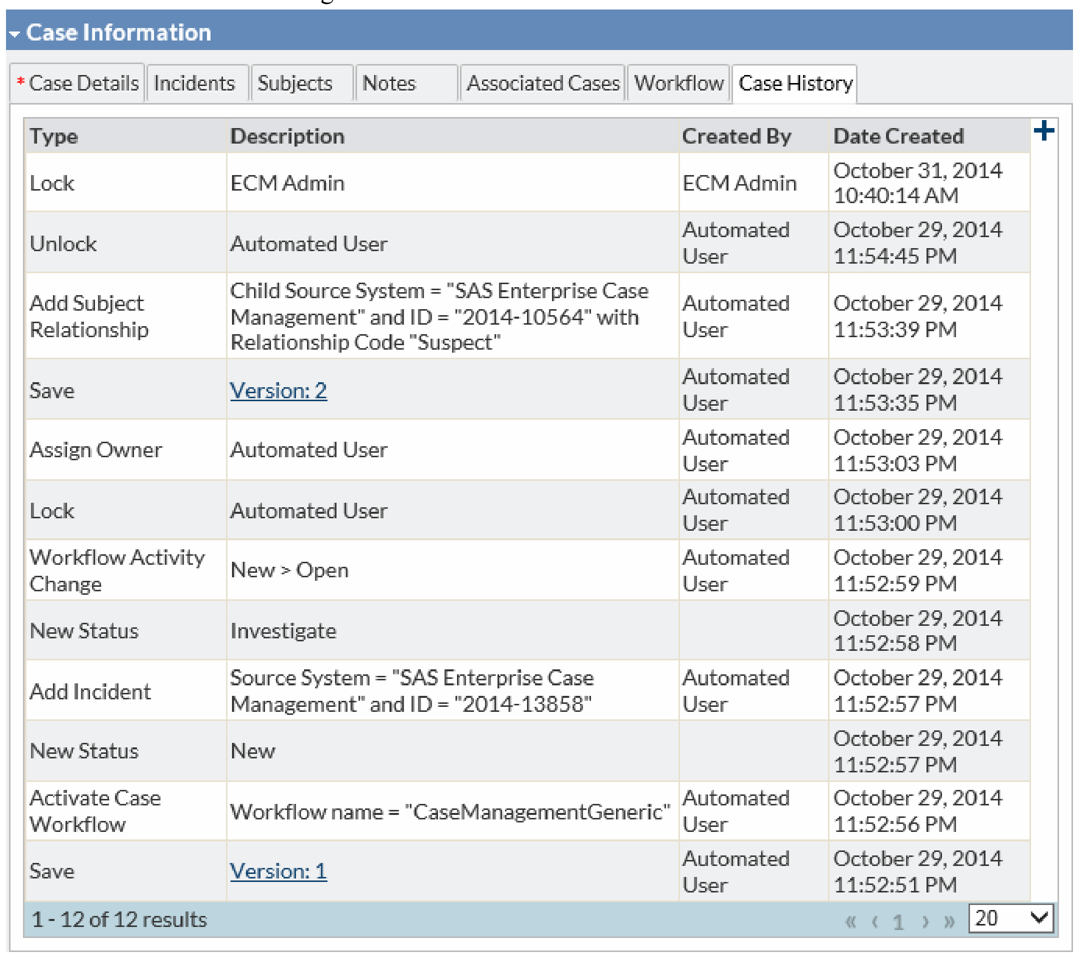
Associated Cases
displays a list of any other cases that are related to this case.

Financial Summary
displays the list of financial items associated with this case and a summary of the financial amounts.

Regulatory Reports
displays a list of regulatory reports associated with this case.

Case History
displays the activity history for the case. The Type column includes the actions that were taken on the case. **Save** indicates that the case was saved after an action.

The Description column provides details about the action. **Version N** refers to the version number that is assigned after a save. When a case is created, it is Version 1. Click **Version 1** to see the original fields entered for the case.



Type	Description	Created By	Date Created
Lock	ECM Admin	ECM Admin	October 31, 2014 10:40:14 AM
Unlock	Automated User	Automated User	October 29, 2014 11:54:45 PM
Add Subject Relationship	Child Source System = "SAS Enterprise Case Management" and ID = "2014-10564" with Relationship Code "Suspect"	Automated User	October 29, 2014 11:53:39 PM
Save	Version: 2	Automated User	October 29, 2014 11:53:35 PM
Assign Owner	Automated User	Automated User	October 29, 2014 11:53:03 PM
Lock	Automated User	Automated User	October 29, 2014 11:53:00 PM
Workflow Activity Change	New > Open	Automated User	October 29, 2014 11:52:59 PM
New Status	Investigate		October 29, 2014 11:52:58 PM
Add Incident	Source System = "SAS Enterprise Case Management" and ID = "2014-13858"	Automated User	October 29, 2014 11:52:57 PM
New Status	New		October 29, 2014 11:52:57 PM
Activate Case Workflow	Workflow name = "CaseManagementGeneric"	Automated User	October 29, 2014 11:52:56 PM
Save	Version: 1	Automated User	October 29, 2014 11:52:51 PM

Click **Version N** to open the Case Version Comparison dialog box. All subsequent changes are compared to the previous version. For example, Version 4 is compared to Version 3. Blank fields indicate no changes. Click the arrows in the top right corner of the dialog box to scroll to older or newer versions. Close the view by clicking the **X**.

Custom fields appear as standard fields in the version history, with the field in a one-to-one relationship between the current and previous version. However, custom tables display the full table view from version to version. Any changes from Version 3 to Version 4 show the Version 3 table above the Version 4 table.

Note: When a case's history is viewed, only the subjects of notes are displayed.

Adding Attachments to a Case

Although you cannot make changes to the case while you are viewing it, you can add attachments to the case. To add an attachment, click . This opens the Attachments dialog box, enabling you to add and view attachments. For more information, see "Adding Attachments" on page 43.

Editing Cases

Editing the Case Task Transition

In SAS Enterprise Case Management, you can edit a case by selecting **Edit** from the Actions menu ( ) on the **Results** pane for cases. When you select **Edit**, 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** pane. The **Action Items** pane displays the task transition information for the case. To update the status for a task, select a transition option from the **Task Transition** drop-down box.

From the **Action Items** pane, you can also select the following actions:

terminates the workflow of a case.

reactivates a case's workflow when an available workflow option is selected.

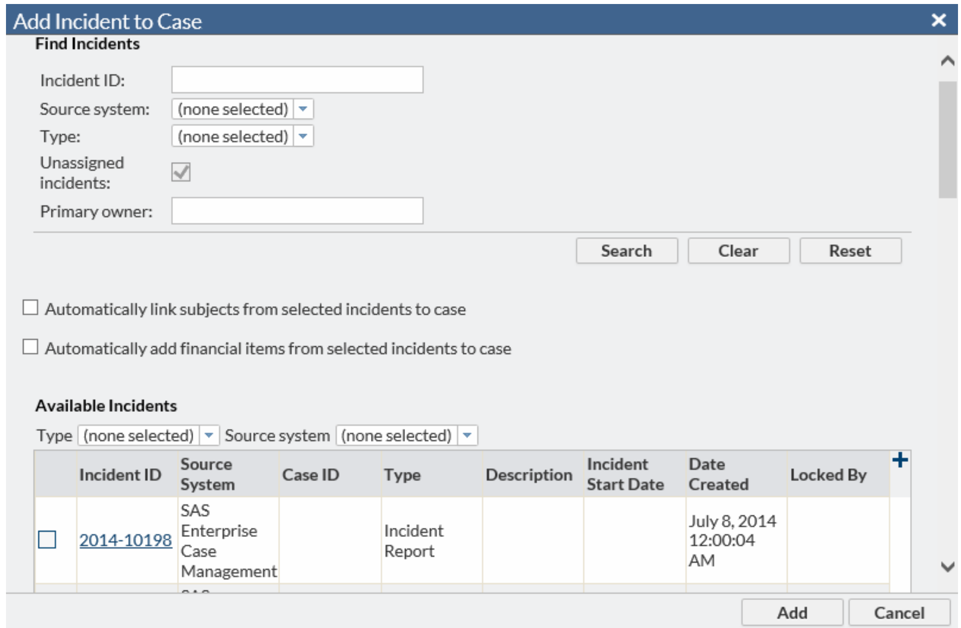
Editing Case Information

You can update information for a case on the **Case Information** pane. The **Case Information** pane contains various items that you can modify. Click to find and correct spelling errors in a field. You can check spelling anywhere the spell check icon appears. The following information can be edited for a case:

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

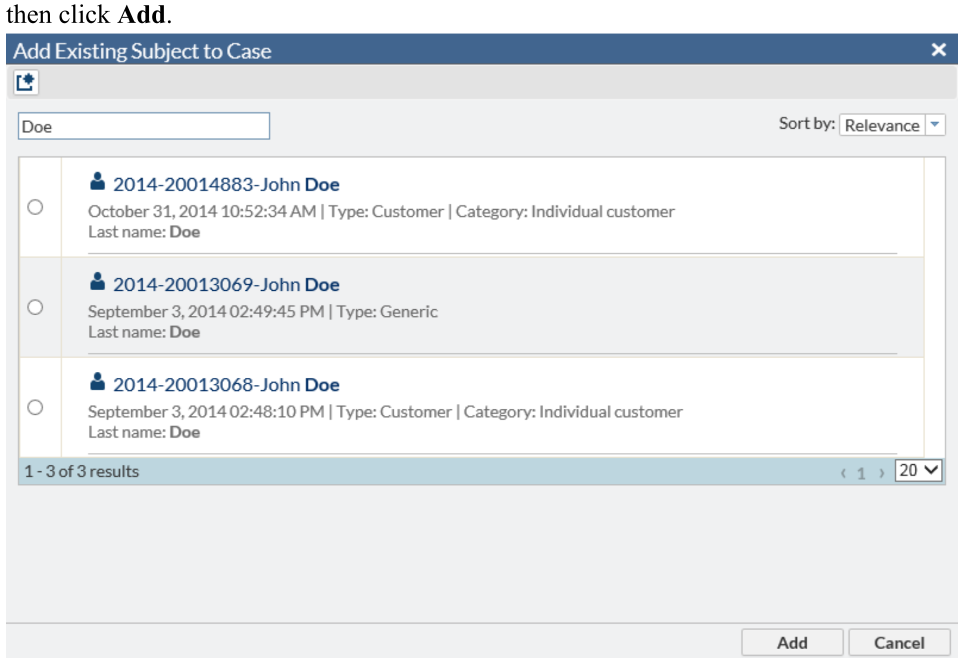
Incidents
displays the incidents related to the case. You can also add an existing incident to the case by clicking . This opens the Add Incident to Case dialog box. Enter the search criteria, and then click **Search**. Select an incident from the **Available Incidents** section, and then click **Add**.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

you clear 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 . This opens the Add Existing Subject to Case dialog box. Enter the search criteria, and then press Enter. Select a subject from the list provided, and then click **Add**.



Define the subject's relationship to the case.

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

Notes

displays the notes related to the case. You can also add notes by typing in the comment box, selecting or creating a category, and clicking **Post**. This automatically saves the note.

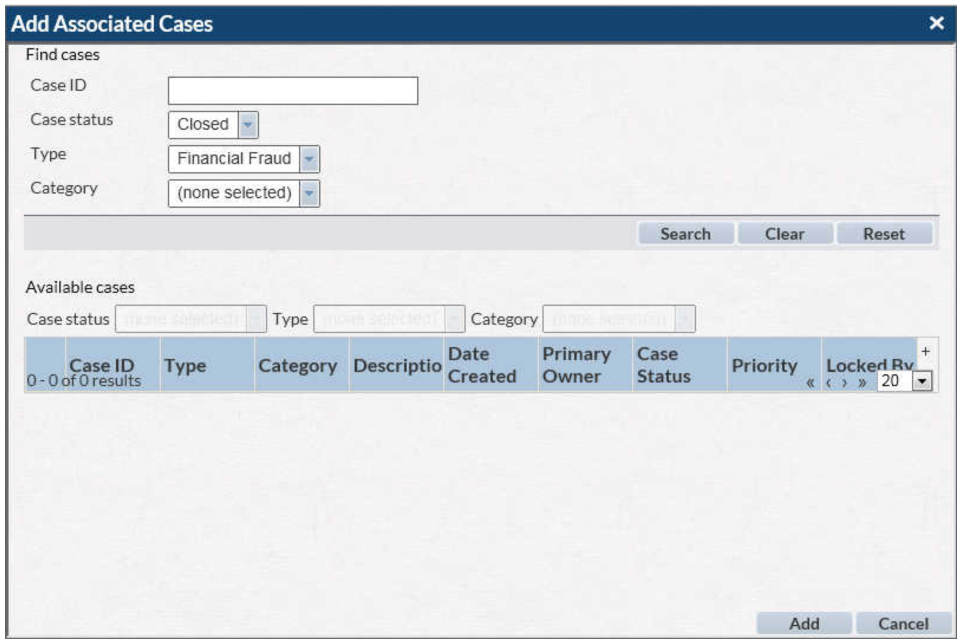
You can sort notes by date or filter them by category.

You can also add an attachment to the note by clicking .

Note: This is different from adding a general attachment, as this attachment is linked directly to the note it is associated with.

Associated Cases

displays a list of other cases that are related to the case. You can also associate another case by clicking . This opens the Add Associated Cases dialog box, where you can select a case, and then click **Add**.



Financial Summary

displays the list of financial items associated with the 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 . 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. Delete financial items by clicking .

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 remain.

Regulatory Reports

displays the reports related to the case. You can also add a report to the case by clicking . For more information on adding a report to a case, see “Creating New Reports” on page 27.

Case History

displays the activity history for the case.

Adding a Task to the Task List

You can create a list of tasks for a case. To create a task, click and fill in **Task Name**, **Due date**, and **Reminder date/time** (optional), where you can specify the date and time that 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 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 from SAS Enterprise Case Management.

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

Managing Subscriptions

You can sign up to receive notifications when specific events occur to this case by selecting **Manage Subscriptions** from the Actions menu ( ). If you are already in a case, click at the top of the window. The Events Subscriptions dialog box appears. Select the events you would like to be notified about by clicking the associated check box, and then click **OK**.

Note: If you want to use the subscription feature, you must have that capability as part of your user or group privileges.

The following are the options for event subscriptions:

Attachments
specifies a notification when attachments are added or deleted.

Notes
specifies a notification when a note is added, edited, or deleted.

Link
specifies a notification when a case, incident, subject, report, or financial item is added to or removed from a case.

Save
specifies a notification when the entity is saved, regardless of the action performed.

Primary Owner
specifies a notification when a primary owner of a case is set or changed.

Unlock
specifies a notification when a case is unlocked.

Workflow
specifies a notification when a case workflow is activated or terminated, and the status of a workflow has changed.

Adding Attachments to a Case

In addition to editing the case, you can add attachments to the case by clicking . This opens the Attachments dialog box, enabling you to add and view attachments. For more information, see "Adding Attachments" on page 43.

Searching the Web for Related Information

When you are editing a case, you can access your web browser by clicking . 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, click to save the changes that you have made. The case is updated with the message **Case saved successfully**.

Click to go back to the list of available cases.

Case Reports

Preview Case Reports

You can preview a case report before you print it. In the **Results** pane, select **Preview Case Report** from the Actions menu () next to a case. To preview a case report from an opened case, click and then select **Preview Case Report**.

A case report includes these items, in order:

1. general case information, including **Action Items**, **Case Information** (split out by tab), and **Task List** panes.
2. case financial items.
3. case notes.
4. case list of attachments.
5. each case incident, including incident details (split out by tab), financial items, notes, and list of attachments.
6. each related subject, including subjects that are linked through an incident. Printed information includes subject details (split out by tab), notes, and list of attachments.

Print Case Reports

If you have already previewed a report, print it by clicking **File** ⇨ **Print** from inside the report. Use your browser's print features to complete the print process.

If you used **Generate Case Report** to print the report, see the following section.

Generated Case Reports

Generated reports are case reports that you can view or print later. You are sent a message when the report is complete. To generate a report, select **Generate Case Report** from the Actions menu ( ) next to a case. To generate a case report from an opened case, click and then select **Generate Case Report**.

To access the case reports, click **Generated Reports** from the **Cases** drop-down menu. You can perform the following actions:

- sort the columns in the report table by clicking the column headings.
- view a report by selecting a Report Name.
- print a generated report by clicking **File** ⇨ **Print** while viewing the report. Use your browser's print features to complete the print process.
- delete a report by clicking the next to the report.

To edit your notification preferences, click , and select **Preferences**. In the **General** pane, change your notification preferences.

Chapter 3

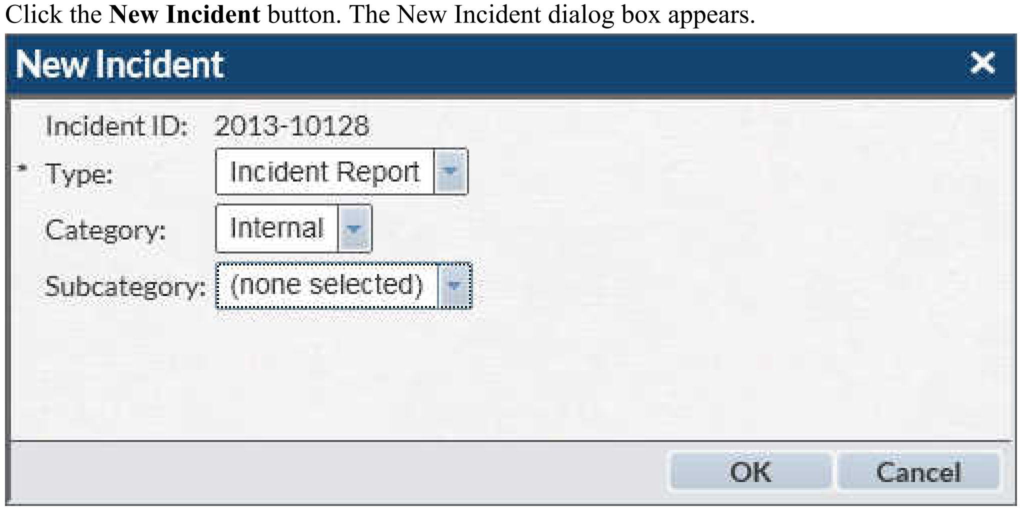
Working with Incidents

Creating New Incidents

You can create new incidents by selecting **New Incident** from the **Incident** drop-down menu.

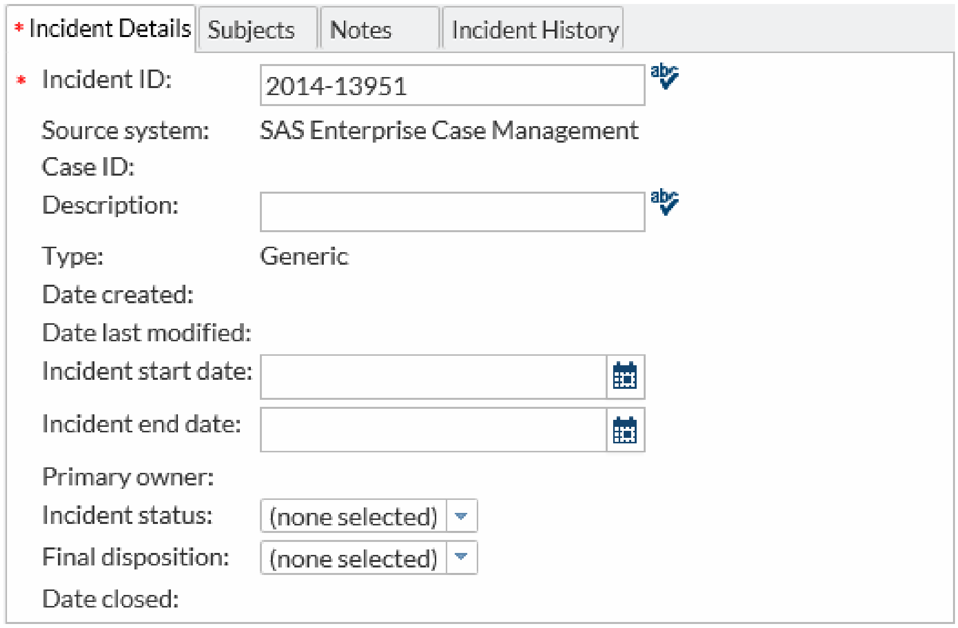
To create a new incident:

1. Click the **New Incident** button. The New Incident dialog box appears.



2. Select the necessary information for the incident.

3. Click **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 to create and save the incident. The new incident is then displayed in the list of available incidents on the **Results** pane of the Search Incidents window.

5. Click to leave the window without saving the incident.

Note: If you did not save the incident before selecting , the Save Changes dialog box appears. Click **Yes** to save the incident. Click **No** to not save the incident and return to the previous window, or click **Cancel** to continue entering information about the incident.

Searching Incidents

Search Options

There are two options for searching within SAS Enterprise Case Management. You can search broadly across entities by using the **Search** box found in the banner at the top of the window (known as global search). You can also search within a specific entity by using the search pane.

Search Box

For information about the **Search** box, see Chapter 7, "Global Search Box," on page 39.

Search Incidents Pane

For information about using the search pane, see Chapter 8, "Entity-Specific Searching," on page 41.

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, click **Search** from the **Incidents** drop-down menu:

1. Select **Related Items** from the Actions menu ( ) on the **Results** pane. You can also select while viewing an individual incident. The Related Items dialog box appears.
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**.

   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. Clear 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 in the Related Items dialog box and create a case. Save the case.
3. Return to the list of unassigned incidents on the **Results** pane. 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

Editing Incident Information

Click to find and correct spelling errors in a field. You can check spelling anywhere the spell check icon appears.

The following information can be edited for an incident:

Note: An incident is locked every time it is edited, to prevent the incident from being worked on concurrently by another user. To unlock an incident from the incident edit window, click .

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 clicking . This opens the Add Existing Subject to Incident dialog box.

To add a new subject and information associated with it, click . 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** pane, enter account information. The **Transactions** pane displays all existing transactions for the incident. Click to open the Add Transaction dialog box and create a new transaction. On the **Transactions** pane, 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 . 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 .

Regulatory Reports
displays the reports related to the incident. You can also add a report to the incident by clicking . For more information on adding a report to an incident, see "Creating New Reports" on page 27.

Notes
displays the notes related to the incident. You can also add notes by typing in the comment box, selecting or creating a category, and clicking **Post**. This automatically saves the note.

You can sort notes by date or filter them by category.

You can also add an attachment to the note by clicking .

Note: This is different from adding a general attachment, as this attachment is linked directly to the note it is associated with.

Incident History
displays the activity history for the incident. The Type column includes the actions that were taken on the incident. **Save** indicates that the incident was saved after an action.

The Description column provides details about the action. **Version N** refers to the version number that is assigned after a save. When an incident is created, it is Version 1. Click **Version 1** to see the original fields entered for the incident.

Click **Version N** to open the Incident Version Comparison dialog box. All subsequent changes are compared to the previous version. For example, Version 4 is compared to Version 3. Blank fields indicate no changes. Click the arrows in the top right corner of the dialog box to scroll to older or newer versions. Close the view by clicking the **X**.

Custom fields appear as standard fields in the version history, with the field in a one-to-one relationship between the current and previous version. However, custom tables display the full table view from version to version. Any changes from Version 3 to Version 4 show the Version 3 table above the Version 4 table.

Note: When an incident's history is viewed, only the subjects of notes are displayed.

Finding Items Related to Unrelated Unassigned Incidents

You can find cases and other incidents that are related to unassigned incidents by clicking). For more information, see "Finding Items Related to Unassigned Incidents" on page 15.

Creating a New Case

Click to access the Related Items window. From there, to create a new case, click . For more information, see "Creating New Cases" on page 3.

Managing Subscriptions

You can sign up to receive notifications when specific events occur to this case by selecting **Manage Subscriptions** from the Actions menu (). If you are already in a case, click at the top of the window. The Events Subscriptions dialog box appears. Select the events you would like to be notified about by clicking the associated check box, and then click **OK**.

Note: If you want to use the subscription feature, you must have that capability as part of your user or group privileges.

The following are the options for event subscriptions:

Attachments
specifies a notification when attachments are added or deleted.

Notes
specifies a notification when a note is added, edited, or deleted.

Link
specifies a notification when a case, incident, subject, report, or financial item is added to or removed from an incident.

Save
specifies a notification when the entity is saved, regardless of the action performed.

Unlock
specifies a notification when an incident is unlocked.

Adding Attachments to an Incident

In addition to editing the incident, you can add attachments to the incident by clicking . This opens the Attachments dialog box, enabling you to add and view attachments. For more information, see "Adding Attachments" on page 43.

Searching for Web Related Information

When you are editing an incident, you can access your web browser by clicking . This opens your web browser, where you can search for information that is related to the incident.

Saving the Edited Incident

When you are finished editing the incident, click to save the changes that you have made. The incident is updated with the message **Incident saved successfully**. Click before you save to close the dialog box without saving the incident.

Chapter 4

Working with Subjects

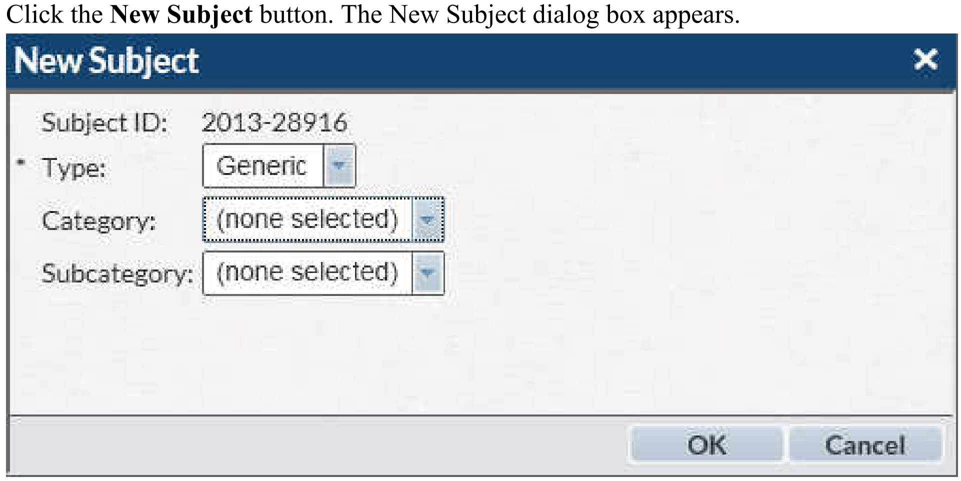
New Subjects

Creating New Subjects

You can create new subjects by selecting **New Subject** from the **Subject** drop-down menu.

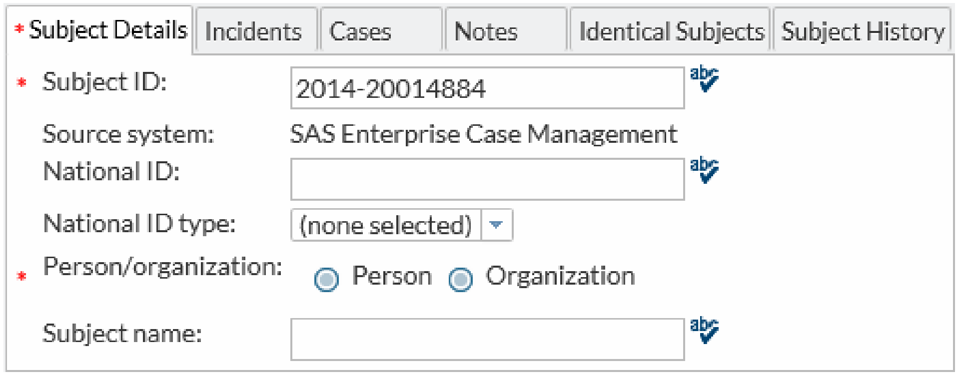
To create a new subject:

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



2. Select the necessary information for the subject.

3. Click **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, click to create and save the subject.

5. Click to leave the window without saving the subject.

Note: If you did not save the subject before clicking , the Save Changes dialog box appears. Click **Yes** to save the subject. Click **No** to not save the subject and return to the previous window, or click **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 . The Add identical subject dialog box appears.

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.

Linking Related Subjects

When you enter a subject, you can link other subjects that are related to it. For example, if you are entering subject Thomas Dooley and you want to capture that his financial advisor, Brenda Vu, is also in the system, you can link Brenda Vu to Thomas Dooley with the Financial Advisor relationship.

To add a related subject, select the **Related Subjects** tab on the Subject window and then follow the same process as when adding an identical subject.

Searching Subjects

Search Options

There are two options for searching within SAS Enterprise Case Management. You can search broadly across entities by using the **Search** box found in the banner at the top of the window (known as global search). You can also search within a specific entity by using the search pane.

Search Box

For information about the **Search** box, see Chapter 7, “Global Search Box,” on page 39.

Search Cases Pane

For information about using the search pane, see Chapter 8, “Entity-Specific Searching,” on page 41.

Editing Subjects

Editing Subject Information

Click to find and correct spelling errors in a field. You can check spelling anywhere the spell check icon appears.

The following information can be edited for a subject:

Note: A subject is locked every time it is edited, to prevent the subject from being worked on concurrently by another user. To unlock a subject from the subject edit window, click .

Subject Details
enables you to edit the details for a subject.

Incidents
displays the incidents related to the subject.

Cases
displays the cases related to the subject.

Notes
displays the notes related to the subject. You can also add notes by typing in the comment box, selecting or creating a category, and clicking **Post**. This automatically saves the note.

You can sort notes by date or filter them by category.

You can also add an attachment to the note by clicking .

Note: This is different from adding a general attachment, as this attachment is linked directly to the note it is associated with.

Identical Subjects

enables you to link other subjects to this one, 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. For more information, see “Linking Identical Subjects” on page 20.

Subject History

displays the activity history for the subject. The Type column includes the actions that were taken on the subject. **Save** indicates that the subject was saved after an action.

The Description column provides details about the action. **Version N** refers to the version number that is assigned after a save. When a subject is created, it is Version 1. Click **Version 1** to see the original fields entered for the subject.

Click **Version N** to open the Subject Version Comparison dialog box. All subsequent changes are compared to the previous version. For example, Version 4 is compared to Version 3. Blank fields indicate no changes. Click the arrows in the top right corner of the dialog box to scroll to older or newer versions. Close the view by clicking the **X**.

Custom fields appear as standard fields in the version history, with the field in a one-to-one relationship between the current and previous version. However, custom tables display the full table view from version to version. Any changes from Version 3 to Version 4 show the Version 3 table above the Version 4 table.

Note: When a subject’s history is viewed, only the subjects of notes are displayed.

Adding a Task to the Task List

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

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

Click to delete completed tasks.

Managing Subscriptions

You can sign up to receive notifications when specific events occur to this case by selecting **Manage Subscriptions** from the Actions menu ( ). If you are already in a case, click at the top of the window. The Events Subscriptions dialog box appears. Select the events you would like to be notified about by clicking the associated check box, and then click **OK**.

Note: If you want to use the subscription feature, you must have that capability as part of your user or group privileges.

The following are the options for event subscriptions:

Attachments
specifies a notification when attachments are added or deleted.

Notes
specifies a notification when a note is added, edited, or deleted.

Link
specifies a notification when a subject is added to or removed from a case, incident, or another subject.

Save
specifies a notification when the entity is saved, regardless of the action performed.

Unlock
specifies a notification when a subject is unlocked.

Adding Attachments to a Subject

In addition to editing the subject, you can add attachments to the subject by clicking . This opens the Attachments dialog box, enabling you to add and view attachments. For more information, see “Adding Attachments” on page 43.

Performing Case Network Analysis

You can investigate a subject by viewing a network of cases, subjects, and incidents that are related to that subject by clicking . For more information, see “Case Network Analysis” on page 23.

Searching for Web Related Information

When you are editing a subject, you can access your web browser by clicking . This opens your web browser, where you can search for information that is related to the subject.

Saving the Edited Subject

When you are finished editing the subject, click to save the changes that you have made. The subject is updated with the message **Subject saved successfully**. Click to go back to the list of available subjects.

Case Network Analysis

Accessing Case Network Analysis

You can investigate a subject by viewing a network of cases, subjects, incidents, and reports that are related to that subject. The subjects can be associated by national ID number or other criteria that were established at your site. To perform case network analysis on a subject, select **Case Network Analysis** () from the Actions menu ()

on the **Results** pane, or from the Subject window. The Enterprise Case Management – Case Network Analysis window appears and the network loads. The subject that you are analyzing is the Graph Origin node and appears in red. The network first draws connectors from the Graph Origin node to related entities. Connections are then made from that related entity to all of the entities associated with it, to widen the network. If the subject has no related entities, only the Graph Origin node appears.

Exploring the Network

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

- Expand — To expand a node or 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.
- 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.
- 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 on the bottom of the Case Network Analysis display. This also maximizes the display area. Double-click again to make the tabs appear. Click the **X** 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.
- Node description — To see a description of a node, position your mouse pointer over a node. To see how nodes are related, position your mouse pointer over a link.
- View details — To view node details, double-click the node. The **Properties** pane is expanded. Click **Show Details** in the **Properties** pane. The **Show Details** pane is expanded at the bottom of the window, as configured by your administrator.

  After the **Show Details** pane is expanded, clicking a new node repopulates the pane with information pertaining to the newly selected node.

  You can sort any column in the **Show Details** pane alphabetically by clicking the column name. Collapse the **Show Details** pane by clicking the **X**.

  Group details are not available, and clicking a group or selecting more than one node hides the **Show Details** pane.
- Annotate — To view or make annotations about a node, do one of the following:
  - Double-click the node to reveal the **Properties** pane. The **Properties** pane contains an unlabeled **Annotation** text box.
  - Click the node and then click **Edit Entity** from the toolbar. The Graph Entities Wizard is displayed, showing the **Annotation** text box. The **Annotation** text box enables you to add an annotation or to view or edit an existing annotation.

Note: If you do not want to see the HTML tags along with the annotations, do not include any HTML tags with the incoming string value.

- Open a new SAS Enterprise Case Management window — Click a URL in a detail tab to view additional information in a new SAS Enterprise Case Management window. You can have multiple windows open at the same time. Note that you can only see the details for cases, incidents, or subjects linked to the origin subject based on your permission.
- Add nodes — To add a node, select a node to which you want to link the new node. Then, from the main menu, select **Add Node** . The Graph Entities Wizard is displayed. This enables you to specify the node properties as well as the link properties. Specify the parameters for the node and for the link that joins the nodes.

  After all the parameters have been specified, click **OK**. The new node and associated link are dropped onto the diagram and are linked to the originally selected node.

  Note: You must save the diagram to save the changes that you made to the node or link.

  To save your updates, click **Save**.
- Hide nodes — To hide a node, click **Collapse Expanded Nodes** from the toolbar

  Note: A node cannot be hidden if the action leaves a node unlinked from other nodes in the network. In these instances, the Hide option does not perform any action.
- Reveal hidden nodes — To reveal hidden nodes, click the plus sign () at the bottom of the node. Hidden nodes and associated links appear in the social network analysis diagram.

  Note: You must save the diagram to save the changes that you made to the node or link.

  To save your updates, click **Save**.

Using the Toolbar

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

Group Nodes ( )
: enables you to organize nodes by grouping them together. Click **Group**. Hold down the Ctrl key and click the left mouse button to define a rectangle around the nodes that you want to group, and then release the mouse button. The selected nodes and their links are highlighted in black. Click **Group** again to collapse the nodes into a single icon. To expand, click .

Add Link ( )
: enables you to establish a link between nodes. Hold down the Ctrl key and select two nodes, and then click . A line appears that connects the nodes.

Run Layout( )
: enables you to choose from two layout options: Tree and Springy.

Re-Group Nodes ( )
: enables you to regroup sets of nodes that you previously grouped and then expanded. Clicking it additional times regroups node sets in reverse sequential order.

Collapse Expanded Nodes ( )
collapses any subject nodes that have been expanded.

Home ( )
centers the network in the display area. Click the arrow ( ) to see options for moving or rotating the network.

Zoom ( )
enables you to get a closer look at portions of the network.

Zoom Out ( )
enables you to zoom out from the diagram.

Print ( )
enables you to print the current view of the network.

Edit Entity ( )
enables you to update the current entity information and specifications.

Delete ( )
enables you to delete the entity from the network view.

Chapter 5

Working with Reports

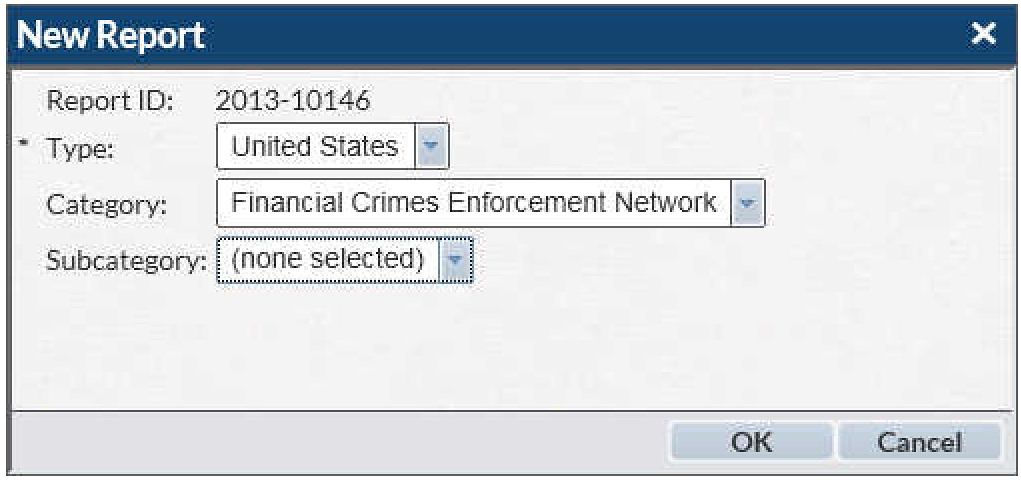
Creating New Reports

You can create new reports by selecting from the list of reports associated with a case or incident.

Note: is available depending on your workflow configuration as well as case or incident type.

To create a new report:

1. Click . The New Report dialog box appears.



2. Select the necessary information for the report. Click **OK** to create the report. The report is opened for editing. You can continue to add information regarding this report.

3. When you are finished, click or to create and save the report. The new report is then displayed in the list of available reports on the case or incident and also on the **Results** pane of the Search Reports window.

   Note: Clicking requires you to enter all of the required information before the report is saved and you are allowed to leave the window. Clicking allows you to save the report and leave the window. However, you receive warnings for information that you need to provide before the report can be moved to the next step in the process.

4. Click to leave the window without saving the report.

Note: If you did not save the report before clicking , the Save Changes dialog box appears. Click **Yes** to save the report. Click **No** to not save the report and return to the previous window, or click **Cancel** to continue entering information about the report.

Searching Reports

Search Options

There are two options for searching within SAS Enterprise Case Management. You can search broadly across entities by using the **Search** box found in the banner at the top of the window (known as global search). You can also search within a specific entity by using the search pane.

Search Box

For information about the **Search** box, see Chapter 7, “Global Search Box,” on page 39.

Search Reports Pane

For information about using the search pane, see Chapter 8, "Entity-Specific Searching," on page 41.

Editing Reports

Editing the Report Activity Status

In SAS Enterprise Case Management, you can edit a report by selecting **Edit** from the Actions menu ( ) on the **Results** pane for reports. When you select **Edit**, the selected report opens. You can then make any needed changes to the report. The report and the report status for the report are displayed. On this page, you can update the report status on the **Action Items** pane. The **Action Items** pane displays the task transition information for the report. To update the status for a task, select a transition option from the **Task Transition** drop-down box.

From the **Action Items** pane, you can also select the following actions:

terminates the workflow of a report.

reactivates a report's workflow when an available workflow option is selected.

Note: A report is locked every time it is edited, to prevent the report from being worked on concurrently by another user. To unlock a report from the report edit window, click .

Editing Report Information

You can update information for a report on the **Report Information** pane. The **Report Information** pane contains various items that you can modify. Click to find and correct spelling errors in a field. You can check spelling anywhere the spell check icon appears. The following information can be edited for a report:

Report Details
enables you to edit the details for a report. This is where you specify any .csv attachment you want to add to the e-file generated from this report.

Notes
displays the notes related to the report. You can also add notes by typing in the comment box, selecting or creating a category, and clicking **Post**. This automatically saves the note.

You can sort notes by date or filter them by category.

You can also add an attachment to the note by clicking .

Note: This is different from adding a general attachment, as this attachment is linked directly to the note it is associated with.

Report History

displays the activity history for the report. The Type column includes the actions that were taken on the report. **Save** indicates that the report was saved after an action.

The Description column provides details about the action. **Version N** refers to the version number that is assigned after a save. When a report is created, it is Version 1. Click **Version 1** to see the original fields entered for the report.

Click **Version N** to open the Report Version Comparison dialog box. All subsequent changes are compared to the previous version. For example, Version 4 is compared to Version 3. Blank fields indicate no changes. Click the arrows in the top right corner of the dialog box to scroll to older or newer versions. Close the view by clicking the **X**.

Note: When a report's history is viewed, only the subjects of notes are displayed.

Managing Subscriptions

You can sign up to receive notifications when specific events occur to this report by selecting **Manage Subscriptions** from the Actions menu ( ). If you are already in a report, click at the top of the window. The Events Subscriptions dialog box appears. Select the events you would like to be notified about by clicking the associated check box, and then click **OK**.

Note: If you want to use the subscription feature, you must have that capability as part of your user or group privileges.

The following are the options for event subscriptions:

Attachments

specifies a notification when attachments are added or deleted.

Notes

specifies a notification when a note is added, edited, or deleted.

Link

specifies a notification when a report is added to or removed from an e-file.

Save

specifies a notification when the entity is saved, regardless of the action performed.

Unlock

specifies a notification when a report is unlocked.

Workflow

specifies a notification when a report workflow is activated or terminated, and the status of a workflow has changed.

Adding Attachments to a Report

In addition to editing the report, you can add attachments to the report by clicking . This opens the Attachments dialog box, enabling you to add and view attachments. For more information, see "Adding Attachments" on page 43.

Saving the Edited Report

When you are finished editing the report, click to save the changes that you have made (excluding the items in the **Actions Items** pane). The report is updated with the message **Report saved successfully**. To save the items in the **Action Items** pane, click **Save Report and Action Items**.

Preview Reports

You can preview a report before you print it. In the **Results** pane, select **Preview Report** from the menu. This displays the report in a style that has been associated with the report type. This can be in PDF, HTML, or RTF format, for example.

Print Reports

If you have already previewed a report, you can print the report by using the embedded print functionality of the technology being used to view the report (for example, printing from Adobe Reader).

Chapter 6

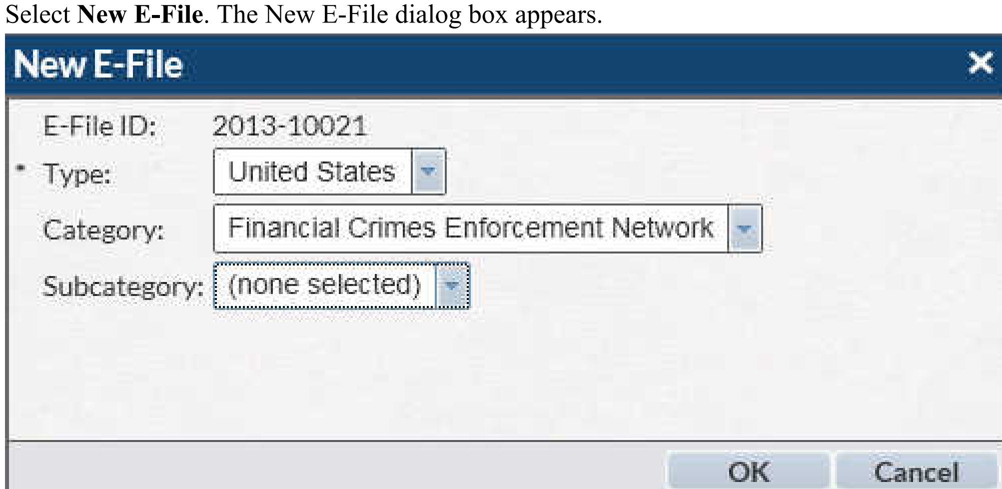
Working with E-Files

Creating New E-Files

You can create new e-files by selecting **New E-File** from the **New E-File** drop-down menu.

To create a new e-file:

1. Select **New E-File**. The New E-File dialog box appears.



2. Select the necessary information for the e-file and click **OK** to create the e-file.

The e-file is then opened for editing. You can continue to add information about this e-file.

3. When you are finished, click to create and save the e-file. The new e-file is then displayed in the list of available e-files on the **Results** pane of the Search E-Files window.

4. Select to leave the window without saving the e-file.

Note: If you did not save the e-file before clicking , the Save Changes dialog box appears. Click **Yes** to save the e-file. Click **No** to not save the e-file and return to the previous window, or click **Cancel** to continue entering information about the e-file.

Searching E-Files

Search Options

There are two options for searching within SAS Enterprise Case Management. You can search broadly across entities by using the **Search** box found in the banner at the top of the window (known as global search). You can also search within a specific entity by using the search pane.

Search Box

For information about the **Search** box, see Chapter 7, “Global Search Box,” on page 39.

Search E-Files Pane

For information about using the search pane, see Chapter 8, “Entity-Specific Searching,” on page 41.

Editing E-Files

Editing E-File Information

You can update information for an e-file on the **E-File Details** pane. The **E-File Details** pane contains various items that you can modify. Click to find and correct spelling errors in a field. You can check spelling anywhere the spell check icon appears. The following information can be edited for an e-file:

Note: An e-file is locked every time it is edited, to prevent the e-file from being worked on concurrently by another user. To unlock an e-file from the e-file edit window, click .

E-File
enables you to edit the details for an e-file.

Notes

displays the notes related to the e-file. You can also add notes by typing in the comment box, selecting or creating a category, and clicking **Post**. This automatically saves the note.

You can sort notes by date or filter them by category.

You can also add an attachment to the note by clicking .

Note: This is different from adding a general attachment, as this attachment is linked directly to the note it is associated with.

E-File History

displays the activity history for the e-file. The Type column includes the actions that were taken on the e-file. **Save** indicates that the e-file was saved after an action.

The Description column provides details about the action. **Version N** refers to the version number that is assigned after a save. When an e-file is created, it is Version 1. Click **Version 1** to see the original fields entered for the e-file.

Click **Version N** to open the E-File Version Comparison dialog box. All subsequent changes are compared to the previous version. For example, Version 4 is compared to Version 3. Blank fields indicate no changes. Click the arrows in the top right corner of the dialog box to scroll to older or newer versions. Close the view by clicking the **X**.

Note: When an e-file's history is viewed, only the subjects of notes are displayed.

E-File Reports

enables you to update and link reports to an e-file.

Click to open the Add Report to E-File dialog box. This dialog box enables you to link reports to an e-file that is ready to be generated. You can choose multiple reports from this dialog box. See "Adding Reports to an E-File" on page 36 for more information.

To change the status of many reports at the same time, select the check boxes to update some or all of the reports and click .

Generate E-File

enables you to generate an e-file for all the reports that are linked to this e-file.

Post-filing Details

provides information on the generated e-file. You can enter the confirmation ID that comes back from the regulatory agency.

After you click **Generate E-File**, the following fields are populated:

Coverage Start Date

is the earliest activity date from all the reports that are e-filed.

Output Filename

is the name of the DAT file that is sent to the government and that is produced by the generation process.

Output Path Name

is the name of the directory where the output file is stored.

Output Report Count

is the count of all the reports that are generated in this e-file.

Output Line Count

is the number of lines in the file from the **Output Filename** field.

Output File Size (Bytes)
is the size of the output file.

Output Creation Date
is the date that the file in the **Output Filename** field was generated.

SDTM E-File Name
is the name of the e-file that is ready for Secure Direct Transfer Mode (SDTM) submission. If SDTM is not enabled, this field is always empty.

Coverage End Date
is the latest activity date from all the reports that are e-filed.

Submission Response
contains information about the acknowledgement receipt returned by FINCEN after the e-file is submitted. It is expanded when the response file name is not empty.

Response Report
opens the acknowledgement receipt processing report. This report contains the BSA-ID (the Document Control Number) of each Suspicious Activity Report (SAR), Currency Transaction Report (CTR), and Designation of Exempt Person (DOEP), and any primary and secondary errors found by FINCEN. **Response Report** is active only when an acknowledgement receipt has been processed in a batch process.

Note: When you have received the confirmation information after submitting the e-file to the financial center government site, you can paste the information into the **Transmission Date** and **Output Creation Date** fields.

Adding Reports to an E-File

Reports can be added to an e-file only before the e-file's submission file is generated. After you click **Generate E-File**, the status of the e-file changes and information about the generated submission file is populated to the e-file. When you save the e-file at this point, the and **Generate E-File** options are hidden or disabled. If the e-file needs to be generated again, you must change the e-file status back to **Ready to Generate** and save the e-file. This makes the and **Generate E-File** options available again.

Note: To add a report to an e-file, the report type, category, and subcategory must match that of the e-file.

After an e-file is marked as **Accepted**, it is no longer editable.

Managing Subscriptions

You can sign up to receive notifications when specific events occur to this e-file by selecting **Manage Subscriptions** from the Actions menu ( ). If you are already in an e-file, click at the top of the window. The Events Subscriptions dialog box appears. Select the events you would like to be notified about by clicking the associated check box, and then click **OK**.

Note: If you want to use the subscription feature, you must have that capability as part of your user or group privileges.

The following are the options for event subscriptions:

Attachments
specifies a notification when attachments are added or deleted.

Notes
specifies a notification when a note is added, edited, or deleted.

Link
specifies a notification when a report is added to or removed from an e-file.

Save
specifies a notification when the entity is saved, regardless of the action performed.

Unlock
specifies a notification when an e-file is unlocked.

Adding Attachments to a E-File

In addition to editing the e-file, you can add attachments to the e-file by clicking . This opens the Attachments dialog box, enabling you to add and view attachments. For more information, see "Adding Attachments" on page 43.

Saving the Edited E-File

When you have finished editing the e-file, click to save the changes that you have made. The e-file is updated with the message **E-File saved successfully**.

Updating the Report Status

To update the status of a report, click under **E-File Reports**.

Note: The icon is active only after the e-file has a status of **Accepted Batch** or **Rejected Batch**.

From the **Update report status** window, perform the following:

1. Enter document control numbers for all of the reports.
2. From the drop-down box, select a group of reports based on their status.
3. Click **OK** to save the changes.

CAUTION:
Make sure that document control numbers are entered before marking the reports as accepted, since accepted reports are closed and not editable.

Chapter 7

Global Search Box

Performing a Search

If enabled, the **Search** box is visible in the SAS Enterprise Case Management banner. The **Search** box enables you to do a broad search across entities based on the keyword you enter. Type a query in the box and submit it by clicking or pressing the Enter key.

The following is the syntax available for the search box:

AND/OR
: The default is OR, unless configured differently. For example, John Doe is interpreted as John OR Doe.

Nested query
: An example of a nested query is (Bob AND John) OR (Tim AND Brian).

Phrases
: To search for a specific phrase, add quotation marks around it. For example, “John Doe.”

Wildcard
: Use the wildcard * to specify any character or combination of characters. For example, Jo* returns John, Joe, Jonathan, or anything else that begins with the letters “Jo.”

Search Results

After you have entered your search, the results are shown in a list. Click on the entity to see its details. Click to return to the list of results.

In the search results list, you can narrow the focus of the results by selecting the check box next to the available categories that you want to focus on. You can also search by creation date and time range.

Available fields and specific behavior are dependent on the configuration. Selecting multiple filters returns results that match ANY of that field's selected filters. Selecting filters from different fields returns only results that match the filter for each field. Therefore, by default, the filters within a field are treated as OR and the filters between different fields are treated as AND. This means that Type A, Type B, Category Y, Category Z is equivalent to (Type A OR Type B) AND (Category Y OR Category Z).

Chapter 8
Entity-Specific Searching

Search Pane

A search pane for each entity enables you to search for and quickly filter existing entities in SAS Enterprise Case Management. The search results are then shown in the **Results** pane.

Note: The search pane is available for all entities. Searching cases is used only as an example.

Select **Search** from the **Cases** drop-down menu to access the search functionality. The **Search Cases** pane opens.

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

1. Enter each required search term separated by a space in the relevant text fields and select available case information from the drop-down boxes. For example, you can select **Case Status**, which is the current status based on where the case is in the workflow, or the case **Type**.

   Note: By default, **My Subscriptions** is not selected. Select it to receive notifications in your search results for only those cases to which you are subscribed.

2. Click **Search**. Any available cases that meet the all of the search criteria that you entered are displayed in the **Results** pane.
3. You can also reset the search fields by clicking **Reset** before clicking **Search**. This sets the search fields to the values that were last used.
4. Click **Clear** to clear all search fields and results.
5. After you have searched for the cases that you need, you can click on **Search Cases** to reduce the pane.

Results Pane

The **Results** pane displays a list of the specific entities for investigation. By default, the **Results** pane shows the entities that are available to you. You can use the search functionality to 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** pane. 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** pane by selecting the heading label for a column.

If you have permission to edit an entity, you can open it by selecting it from the **Results** pane. You can then edit information about the entity. In addition to selecting an entity to open, you can perform tasks for an entity by selecting Actions ( ). This opens the Actions menu, which contains the following options.

Note: Not all options are available for all entities.

View
: enables you to view the selected entity. The entity is opened and you can view the **Action Items** and **Information** panes.

Edit
: enables you to edit the selected entity. The entity is opened and you can edit items in the **Action Items** and **Information** panes.

Lock and **Unlock**
: enable you to control editing access to the entity. When you select **Lock**, your name then appears in the Locked By column in the **Results** pane, and you have exclusive editing access to the entity. Selecting **Unlock** enables others to have editing access.

Note: An entity is locked every time it is edited to prevent it from being worked on concurrently by another user. To unlock it from the editing page, click .

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

Manage Subscriptions
: enables you to sign up to receive notifications when events occur matching the subscription options that you select.

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

Preview Case Report (for cases only)
: displays the entire case, including related incidents and subjects, notes, and a list of attachments, in a printable format.

Generate Case Report (for cases only)
: generates a case report to view or print later and sends you a message when the report is complete. Click , select **Preferences**, and access the **General** pane to edit your notification preferences. To view or print the generated report, click **Generated Reports**. For more information, see "Case Reports" on page 11.

Chapter 9

Attachments

Adding Attachments

When you are working in SAS Enterprise Case Management, it might be necessary to add supporting documents to an entity (case, incident, subject, report, or e-file). You can add file attachments by clicking when you are editing an entity. You can also select **Attachments** from the Actions menu ( ) on the **Results** pane for an entity. Follow these steps to add an attachment:

1. Select **Attachments**. The Attachments dialog box appears.
2. On the **Add Attachments** pane, enter the location and name of the file that you are attaching. You can also select the **Select file to upload** button to locate the file.
3. If needed, enter a text description of the file that you are attaching in the **Description** box.
4. Click the **Add 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** pane.
5. The **Attachments** pane lists all attachments that are added to the item. If you select an attachment from the **Attachments** pane, the attachment opens in a new dialog box. If needed, you can delete an attachment by clicking that appears beside the attachment.
6. When you are finished adding or deleting attachments, select **Close** to exit the Attachments dialog box.

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