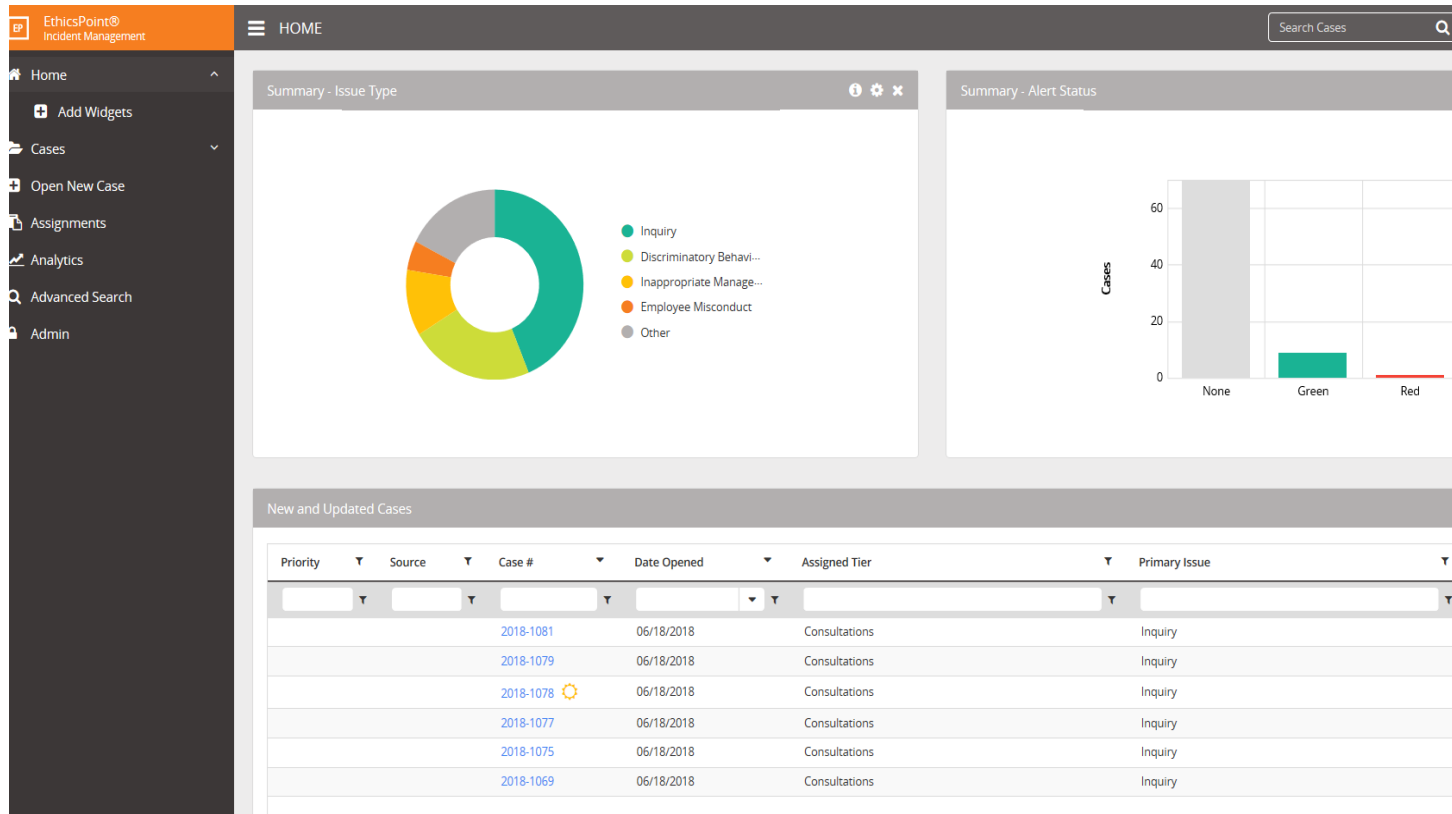


ENTERING NAVEX SYSTEMS FOR NEW ADMINISTRATORS

1. When you enter NAVEX the Dashboard is on the Home page:
2. The dashboard can be change by each administrator according to their preference

Picture 1



ENTERING NAVEX SYSTEMS FOR NEW ADMINISTRATORS

3. To change the dashboard:

- a. Click on the “+” sign next to “Add Widgets” on the left underneath “Home” (see Picture 1 on the previous page)
- b. Add a checkmark in the boxes to the left of the desired information (Picture 2)
- c. Exit by clicking on the “x” to the right of the word “Widgets”(Picture 2)

Picture 2

The screenshot displays the EthicsPoint Incident Management dashboard. On the left, a 'Widgets' sidebar is open, showing a list of widgets under categories: Cases, Tasks, and Reports. The 'Summary - Case Type' and 'Summary - Issue Type' widgets are checked. The main dashboard area contains two donut charts. The 'Summary - Case Type' chart shows four categories: Allegation (teal), Inquiry (light green), none (yellow), and Duplicate (orange). The 'Summary - Issue Type' chart shows five categories: Inquiry (teal), Discriminatory Behavi... (light green), Inappropriate Manage... (yellow), Employee Misconduct (orange), and Other (grey). Below the charts is a table titled 'New and Updated Cases' with columns for Priority, Source, Case #, Date Opened, Assigned Tier, and Primary Issue. The table lists several cases, all with a Primary Issue of 'Inquiry'.

Priority	Source	Case #	Date Opened	Assigned Tier	Primary Issue
		2018-1081	06/18/2018	Consultations	Inquiry
		2018-1079	06/18/2018	Consultations	Inquiry
		2018-1078	06/18/2018	Consultations	Inquiry
		2018-1077	06/18/2018	Consultations	Inquiry
		2018-1075	06/18/2018	Consultations	Inquiry
		2018-1069	06/18/2018	Consultations	Inquiry

ENTERING NAVEX SYSTEMS FOR NEW ADMINISTRATORS

4. Ways to review cases in NAVEX:

- a. Click on the Case # on the dashboard or;(Picture 3)
- b. Click on Case to left of the home page (Picture 3)
 - i. Click “All Cases” to see every case listed in the system click Case # (Picture 4)
 - ii. Click “Cases by Tier” to view cases click the desired tier then click Case # in the selected tier (See Picture 5)

Picture 3

The screenshot displays the NAVEX EthicsPoint Incident Management dashboard. The sidebar menu on the left includes 'Home', 'Cases', 'All Cases', 'Cases by Tier', 'Open New Case', 'Assignments', 'Analytics', 'Advanced Search', and 'Admin'. The 'Cases' menu item is circled in blue. The main content area features two donut charts: 'Summary - Case Type' and 'Summary - Issue Type'. The 'Case Type' chart shows segments for Allegation (green), Inquiry (yellow-green), none (orange), and Duplicate (red). The 'Issue Type' chart shows segments for Inquiry (green), Discriminatory Behavi... (yellow-green), Inappropriate Manage... (orange), Employee Misconduct (red), and Other (grey). Below the charts is a table titled 'New and Updated Cases' with columns for Priority, Source, Case #, Date Opened, Assigned Tier, and Primary Issue. The table lists several cases, with the first row (Case # 2018-1081) highlighted in yellow.

Priority	Source	Case #	Date Opened	Assigned Tier	Primary Issue
		2018-1081	06/18/2018	Consultations	Inquiry
		2018-1079	06/18/2018	Consultations	Inquiry
		2018-1078	06/18/2018	Consultations	Inquiry
		2018-1077	06/18/2018	Consultations	Inquiry
		2018-1075	06/18/2018	Consultations	Inquiry
		2018-1069	06/18/2018	Consultations	Inquiry

ENTERING NAVEX SYSTEMS FOR NEW ADMINISTRATORS

- i. Click “All Cases” to see every case listed in the system click Case # (Picture 4)

Picture 4

The screenshot shows the EthicsPoint Incident Management interface. The left sidebar contains navigation options: Home, Cases, All Cases (circled in red), Cases by Tier, Open New Case, Assignments, Analytics, Advanced Search, and Admin. The main content area is titled 'ALL CASES' and includes a search bar and filters. Below the filters is a table of cases.

Priority	Source	Case #	EPRS #	Date Opened	Tier	Primary Issue	Status	Type	Is Escalated
	Hotline	2018-1074	9	6/18/2018	Jefferson County Commission	Inquiry	New	Inquiry	
	Hotline	2018-1049	8	6/12/2018	Test Tier	Conflict of Interest/Unethical Behavior	New	Allegation	
	Hotline	2018-1038	7	5/30/2018	Test Tier	Unfair Treatment	CEIO Review	Allegation	
	Hotline	2018-1036	6	5/29/2018	Test Tier	Discriminatory Behavior/Harassment	Closed	Allegation	
	Hotline	2018-1033	5	5/25/2018	Test Tier	Employee Misconduct	New	Allegation	
	Hotline	2018-1032	4	5/25/2018	Test Tier	Inappropriate Management Practices	New	Allegation	
	Hotline	2018-1030	3	5/25/2018	Test Tier	Violence or Threat (including sexual violence)	New	Allegation	
	Hotline	2018-1029	2	5/25/2018	Test Tier	Employee Misconduct	New	Allegation	
	Hotline	2018-1003	1	4/16/2018	Test Tier	Inappropriate Management Practices	New	Allegation	
		2018-1084		6/18/2018	Consultations	Inquiry	New	Inquiry	
		2018-1083		6/18/2018	Consultations	Inquiry	New	Inquiry	
		2018-1082		6/18/2018	Consultations	Inquiry	New	Inquiry	
		2018-1081		6/18/2018	Consultations	Inquiry	New	Inquiry	
		2018-1080		6/18/2018	Consultations	Inquiry	New	Inquiry	
		2018-1079		6/18/2018	Consultations	Inquiry	New	Inquiry	
		2018-1078		6/18/2018	Consultations	Inquiry	New	Inquiry	
		2018-1077		6/18/2018	Consultations	Inquiry	New	Duplicate	
		2018-1076		6/18/2018	Consultations	Inquiry	New	Inquiry	
		2018-1075		6/18/2018	Consultations	Inquiry	New	Inquiry	
		2018-1073		6/18/2018	Consultations	Inquiry	New	Inquiry	

ENTERING NAVEX SYSTEMS FOR NEW ADMINISTRATORS

- ii. Click “Cases by Tier” to view cases click the desired tier then click Case # in the selected tier (See Picture 5)

Picture 5

The screenshot displays the 'Cases by Tier' interface in the EthicsPoint Incident Management system. The left sidebar contains navigation options: Home, Cases, All Cases, Cases by Tier (highlighted with a red circle), Open New Case, Assignments, Analytics, Advanced Search, and Admin. The main content area features a search bar for 'Case Number' and a table summarizing cases by tier.

Jefferson County Commission		Cases			
View all		Total	New and Updated	Open	Closed
Jefferson County Commission		36	6	32	4
Test Tier		15	13	12	3
Consultations		32	8	32	0
Summary Total		83	27	76	7