

eCASE

ADR

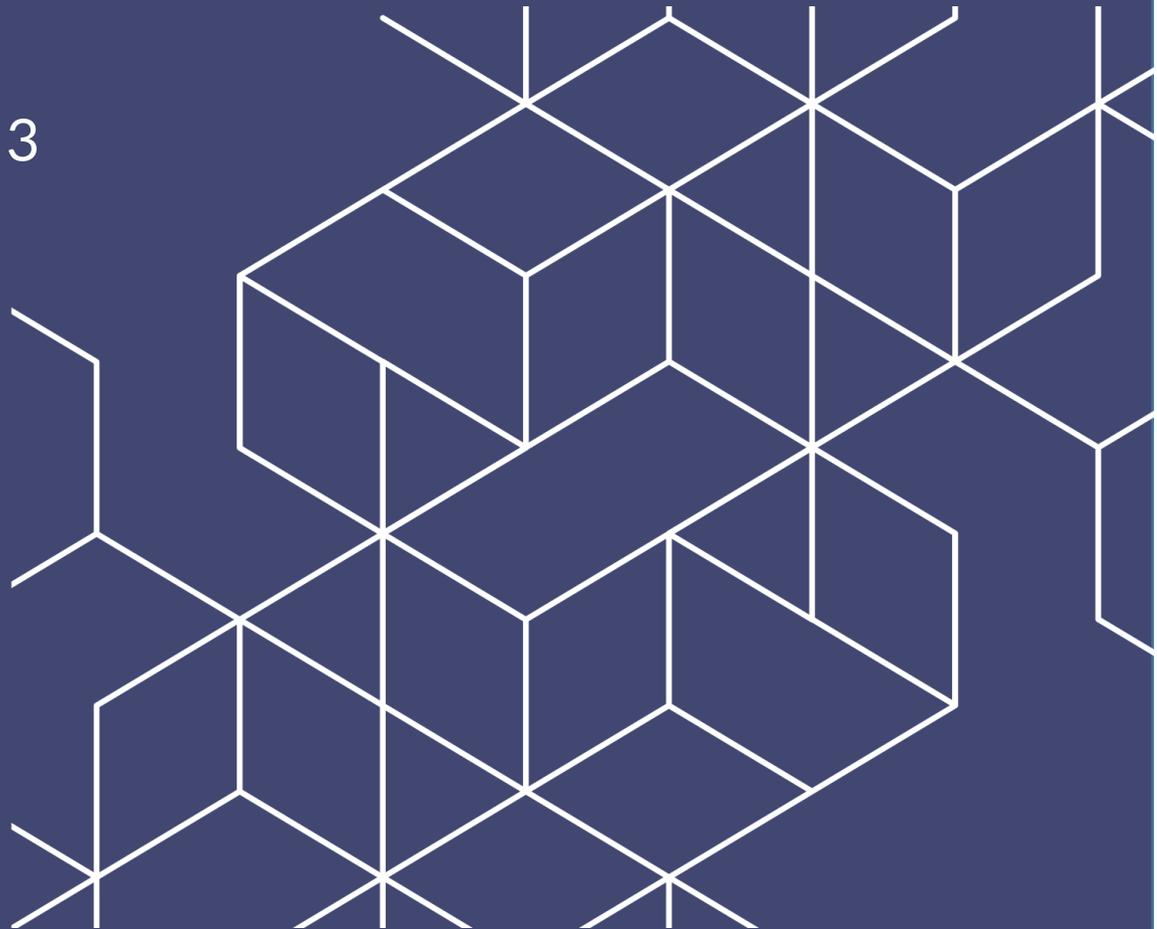


Neutral Portal User Manual

Version 1.0

v2.4.1

June 2023



ADR Neutral Portal User Manual v2.4.1

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Using This Manual

The following formatting conventions are used in this manual to highlight important information:

- *Italicized* text indicates a location, for example a particular *Folder*, *Tab*, or *Window*.
- **Bold** text indicates a specific user action, such as clicking a **button**.
- **Red** text and this symbol **(!!)** are used in Notes to **bring attention to crucial information**.



1 About This Manual

Welcome to the Alternative Dispute Resolution (ADR) Neutral Portal User Guide. The Neutral Portal provides neutral party mediators access to necessary messages and case data to assist in processing ADRs. This manual provides details on how this portal works and actions available to you as a portal user.

1.1 In This Document

The following topics are discussed in this manual:

- Accessing the Portal
- Portal User Interface
- Case Tracking and Processing
- Event creation and tracking
- User Inbox and Sending Messages Using the Portal
- Using Attachments

1.2 Using This Manual

The following formatting conventions are used in this manual to highlight important information:

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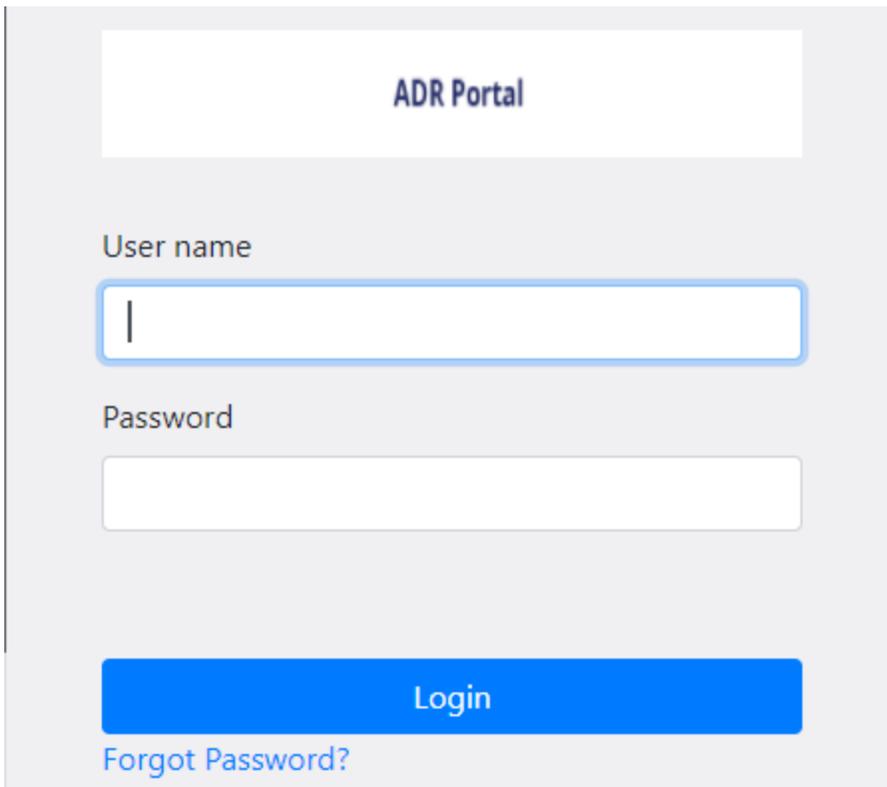


2 Getting Started

The following subsections provide instructions on accessing the Neutral Portal and beginning the workflow.

2.1 Accessing the Neutral Portal

As a portal user, you will receive an email when your account is created, allowing you to log in to the portal. An example log in screen is shown below:



The screenshot shows a login interface for the ADR Portal. At the top, the text "ADR Portal" is centered in a blue font. Below this, there are two input fields: "User name" and "Password". The "User name" field contains a single vertical bar character. Below the "Password" field is a blue "Login" button. At the bottom left, there is a link that says "Forgot Password?" in blue text.

To access the portal, provide your *User name* as well as your *Password*, then click **Sign In**.

After signing in, the *Workflow Case Tracking and Processing* dashboard appears as shown below.



Getting Started

The screenshot shows the eCASE portal dashboard. At the top left is the eCASE logo. To the right of the logo is the text "Workflow Case Tracking and Processing". Below the logo and text is a navigation bar with "My Forms" and "Log out" buttons. The main content area is titled "My Forms" and contains a table with four columns: Name, Status, Case Number, and Case Status. The table has four rows of data. To the right of the table is a "Unread Messages (2)" section with an "Inbox" link. It lists two messages, both titled "A Test Email Template for ReplaceEv..", with timestamps of 5/5/2021 2:19:40 PM and 5/5/2021 2:17:04 PM.

Name	Status	Case Number	Case Status
Randall Hamm	Returned for Correction	2021045	Transferred to Neutral
Randall Hamm	Assigned	2021049	Transferred to Neutral
Maya Smith	Assigned	2021046	Transferred to Neutral
Maya Smith	Assigned	2021048	Transferred to Neutral

See the following *Portal User Interface* section for details.

2.2 Portal User Interface

An example of the portal user interface is shown below.

The screenshot shows the eCASE portal dashboard with callouts A, B, and C. Callout A points to the "My Forms" and "Log out" buttons in the navigation bar. Callout B points to the "My Forms" table. Callout C points to the "Unread Messages (1)" section, which lists one message titled "Testing Message Functionality" with a timestamp of 5/4/2021 4:29:13 PM.

Name	Status	Case Number	Case Status
Randall Hamm	Returned for Correction	2021045	Transferred to Neutral
Randall Hamm	Assigned	2021049	Transferred to Neutral
Maya Smith	Assigned	2021046	Transferred to Neutral
Maya Smith	Assigned	2021048	Transferred to Neutral

The main areas of the *Dashboard* are described in the following table.



Ref	Element	Description
A	Navigation Bar	Use these buttons to return to the My Forms page, or to Log out .
B	My Forms	All forms assigned to you are listed in the <i>My Forms</i> list. Select the <i>Name</i> of the form you'd like to open to view the form in the workspace. See the Error! Reference source not found. section for details on working with forms.
C	Unread Messages	Widget displaying notifications for Unread Messages, and a link to access the full inbox.

2.3 My Forms

The *My Forms* list on your dashboard provides a list of forms assigned to you. An example *My Forms* list is shown below and described in the following table.

My Forms			
A	B	C	D
Name	Status	Case Number	Case Status
Randall Hamm	Returned for Correction	2021045	Transferred to Neutral
Randall Hamm	Assigned	2021049	Transferred to Neutral
Maya Smith	Assigned	2021046	Transferred to Neutral
Maya Smith	Assigned	2021048	Transferred to Neutral

Ref	Element	Description
A	Name	Name of the complainant listed on this case. Select a Name from this column to open the case for processing.



Getting Started

Ref	Element	Description
B	Status	Status of this assignment here in the portal. You can manually set this status based on actions taken on this case. See the <i>Error! Reference source not found.</i> section for details.
C	Case Number	Case number assigned to this case in the originating system, outside the portal.
D	Case Status	Status of this case as reported by the linked ADR system.



3 Workflow Case Tracking and Processing

The following subsections provide instruction on accessing assigned forms and moving through the case workflow.

3.1 Accessing Assigned Forms

The *Workflow Case Tracking and Processing* workspace is where you process cases received through the Portal. Access the Case Workspace by clicking the desired **Form** under the *Name* column in the *My Forms* list:

My Forms

Name	Status	Case Number	Case Status
Randall Hamm	Returned for Correction	2021045	Transferred to Neutral
Randall Hamm	Assigned	2021049	Transferred to Neutral
Maya Smith	Assigned	2021046	Transferred to Neutral
Maya Smith	Assigned	2021048	Transferred to Neutral

After selecting a form, it opens to display the *Workflow Case Tracking and Processing* workspace, as shown below. See the *Workflow Case Tracking and Processing Workspace* section for details on this user interface.

Save Case Concluded Print Messages Back

Attachment Details

Select

No Attachment(s) to display.

2021049

Complaint Information

Complainant:	Hamm, Randall	Organizational Office:	Executive Secretariat (ES)
District:	Atlanta District	Geographic Office:	Atlanta District Office

Events

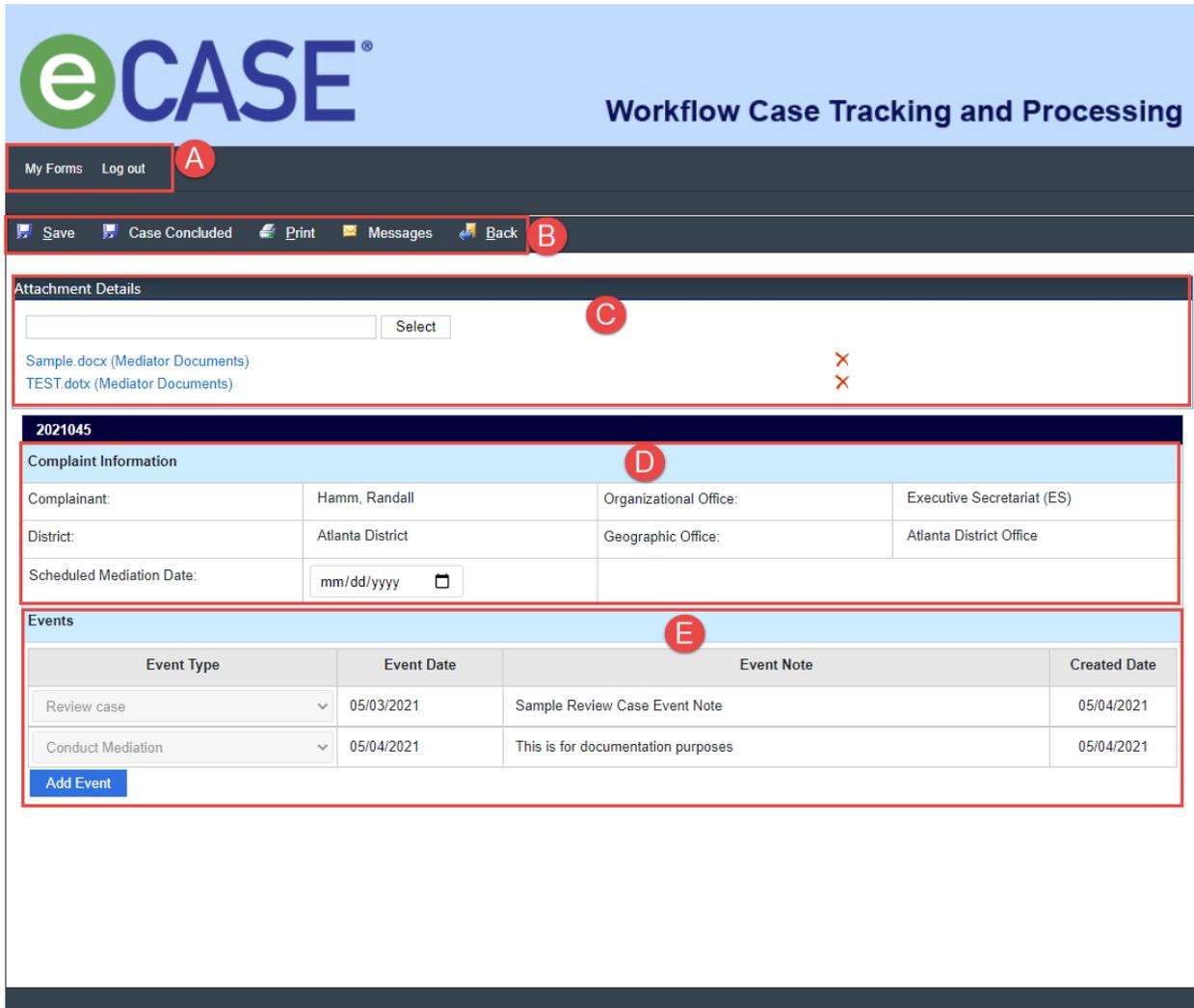
Event Type	Event Date	Event Note	Created Date
Coaching Concluded	05/04/2021	Event Note Event Note	05/04/2021
Schedule Discussion with Upper Manager	05/05/2021	test	05/05/2021

Add Event



3.2 Workflow Case Tracking and Processing Workspace

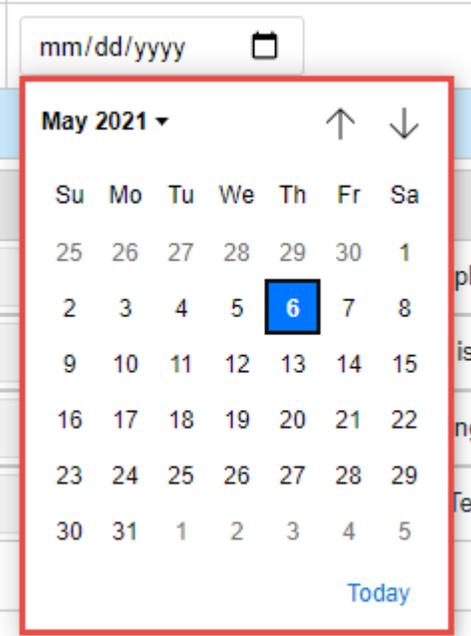
After opening a form, the Workflow Case Tracking and Processing workspace appears, as shown in the example below.



The portal workspace is divided into the following subsections:

Ref	Element	Description
A	Navigation Bar	Use these buttons to return to the My Forms page, or to Log out



Ref	Element	Description
B	Actions Bar	Options to Save the form, Case Concluded to complete an assigned case, Print the case details, access your inbox Messages , and go Back to the home page. Each of these actions is detailed in the following subsections.
C	Attachment Details	A list of previously uploaded attachments (labeled as <i>Mediator Documents</i>) which you can click to view, and a Select button to upload additional attachments
D	Complaint Information	<p>Details about this case, including the <i>Complainant, Organizational Office, District, Geographic Office, and Scheduled Mediation/Facilitation Date</i> (if required).</p> <p>Use the Date Picker to select a <i>Scheduled Mediation/Facilitation Date</i>:</p>  <p>Click the date field to expand the date picker, and then select the desired date. You can use the Arrows to change the month, or click the Month YYYY in the upper-left corner to select month and year.</p>



Ref	Element	Description
E	Events	A list of actions logged on this case in the portal. These can be added manually by clicking Add Event . See the <i>Error! Reference source not found.</i> section for steps to manually log events.

3.3 Add Event

The Events workspace is where you'll log activity on this case, such as scheduling mediation of conducting debriefs. To add an event:

1. Log in to the Neutral Portal and open the desired case folder. Navigate to the *Events* subsection and click **Add Event**.

Events			
Event Type	Event Date	Event Note	Created Date
Review case	05/03/2021	Sample Review Case Event Note	05/04/2021
Conduct Mediation	05/04/2021	This is for documentation purposes	05/04/2021

Add Event

2. The Portal refreshes, and displays a blank Event entry in the *Event* workspace.

(!!) Note: Required fields are highlighted in red on this form.

3. Select the **Event Type** from the drop-down list.

<input type="text" value="Schedule Mediation"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="05/05/2021"/>
---	---	---

4. Use the **Date Picker** to select the *Event Date* (or enter the date manually).
5. Enter specific details about the event in the *Event Note* field.
6. Click **Save**.



Workflow Case Tracking and Processing

Attachment Details

Save Case Concluded Print Messages Back

Select

Sample.docx (Mediator Documents) X
TEST.dotx (Mediator Documents) X

2021045

Complaint Information

Complainant:	Hamm, Randall	Organizational Office:	Executive Secretariat (ES)
District:	Atlanta District	Geographic Office:	Atlanta District Office
Scheduled Mediation Date:	mm/dd/yyyy		

Events

Event Type	Event Date	Event Note	Created Date
Review case	05/03/2021	Sample Review Case Event Note	05/04/2021
Conduct Mediation	05/04/2021	This is for documentation purposes	05/04/2021
Schedule debrief	05/04/2021	Testing Testing 123	05/05/2021

Add Event

7. The Portal refreshes and displays the *My Forms* workspace. Open the case folder; the newly created event appears in the Events workspace.

Events

Event Type	Event Date	Event Note	Created Date
Coaching Concluded	05/04/2021	Event Note Event Note	05/04/2021
Schedule Discussion with Upper Manager	05/05/2021	test	05/05/2021
Conduct Interim Debrief	05/06/2021	Conduct interim debrief for documentation purposes.	05/06/2021

Add Event

3.4 Add Attachment

While updating the ADR form, it may become necessary to add an attachment. To add an attachment:

1. Log in to the portal and open the desired case form. Within the *Attachment Details* section, click **Select**.

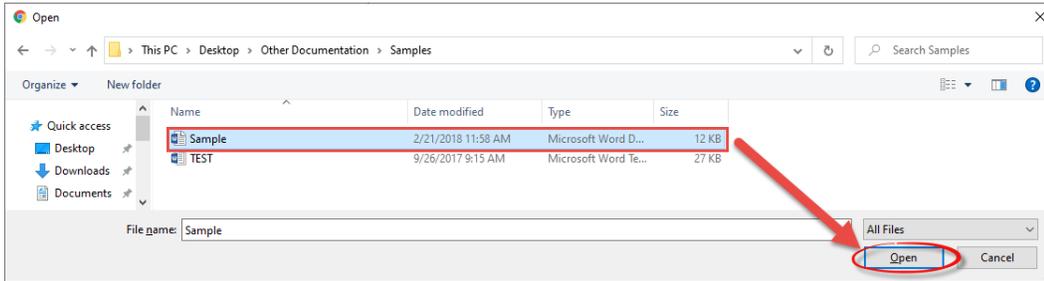
Attachment Details

Select

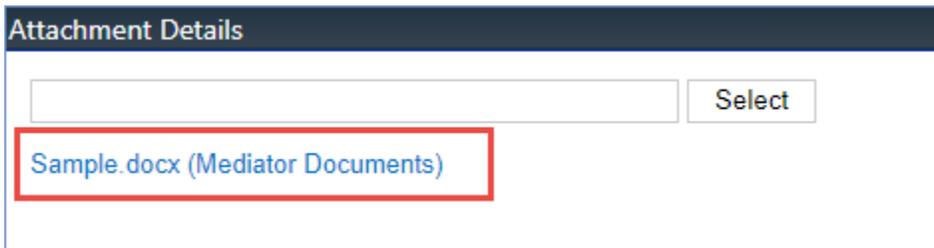
No Attachment(s) to display.



- The *File Explorer* pop up window appears. Select the desired attachment and click **Open**.



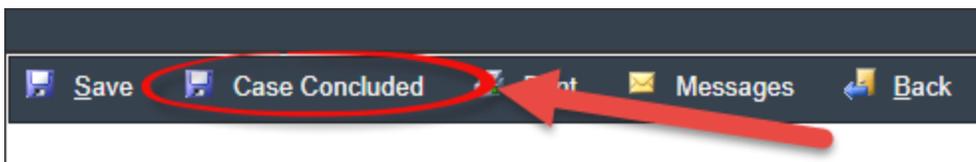
- The *Attachment Details* workspace updates and displays the selected attachment within the workspace.



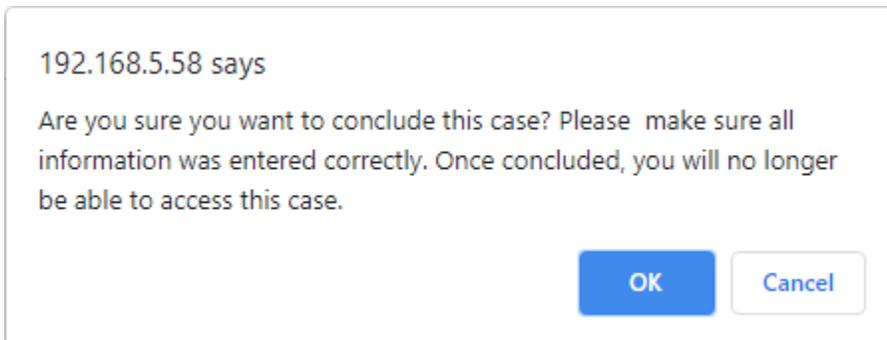
3.5 Conclude Case

After the Portal actions and submissions are complete, you can take action to conclude the case. To conclude a case within the Portal:

- Log in to the Neutral Portal and open the desired case folder.
- From within the case form, click **Case Concluded**.



- A confirmation message appears as shown below. Click **OK**.



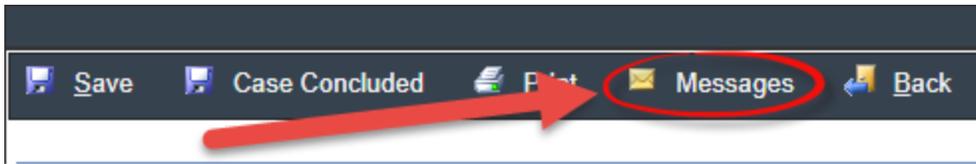
- The Portal Refreshes and returns to the *My Forms* page. The Case user receives an email notification indicating the case has been submitted/provided clarification. The case is now concluded and no longer appears on the *My Forms* workspace.



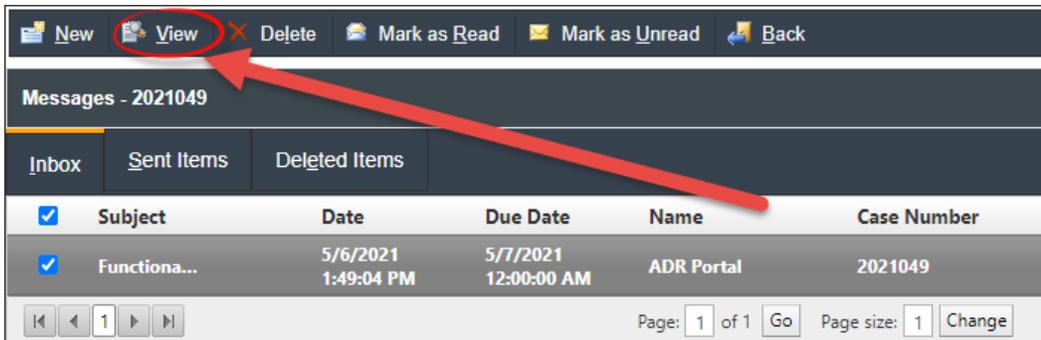
3.6 View Messages

To view the messages sent for case work:

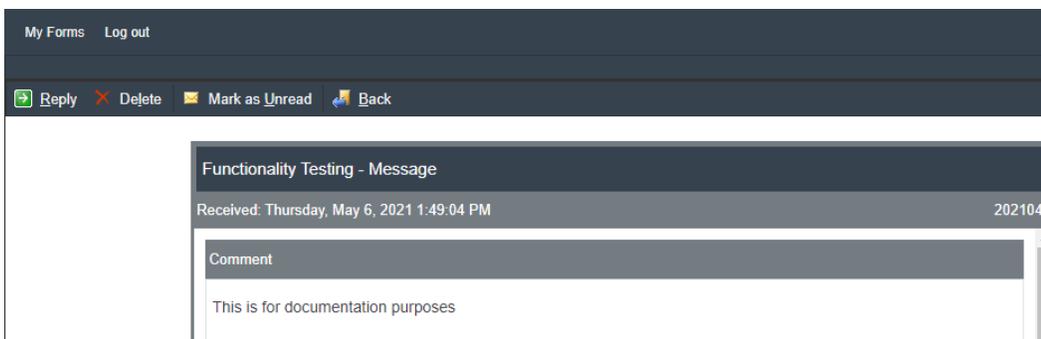
1. Log in to the Neutral Portal and open the desired case folder. Click **Messages**.



2. The page refreshes and displays the messaging inbox, with unread messages displayed in bold. Click the checkbox adjacent the desired message.
3. Click **View**.



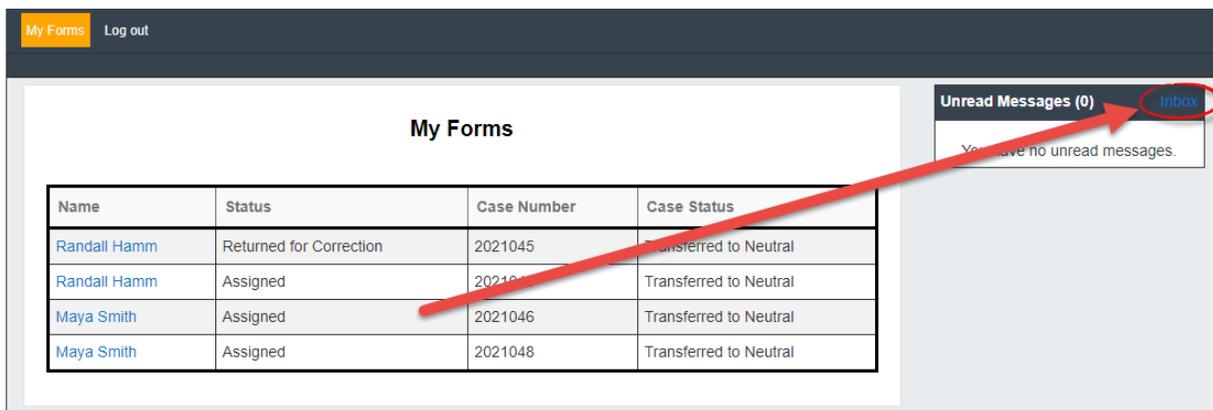
The workspace updates to display the full message. Within the workspace there are options to Reply to the message, Delete the message, mark the message as unread, and return to the case workspace. See the *Inbox* section for more details on working with messages.



4 Inbox

The ADR Inbox Workspace is where you will communicate with other stakeholders related to your ongoing case forms. Access the Case Workspace by clicking the **Name** link corresponding to the desired assigned case folder. After clicking, the portal refreshes and displays the Portal Case Workspace.

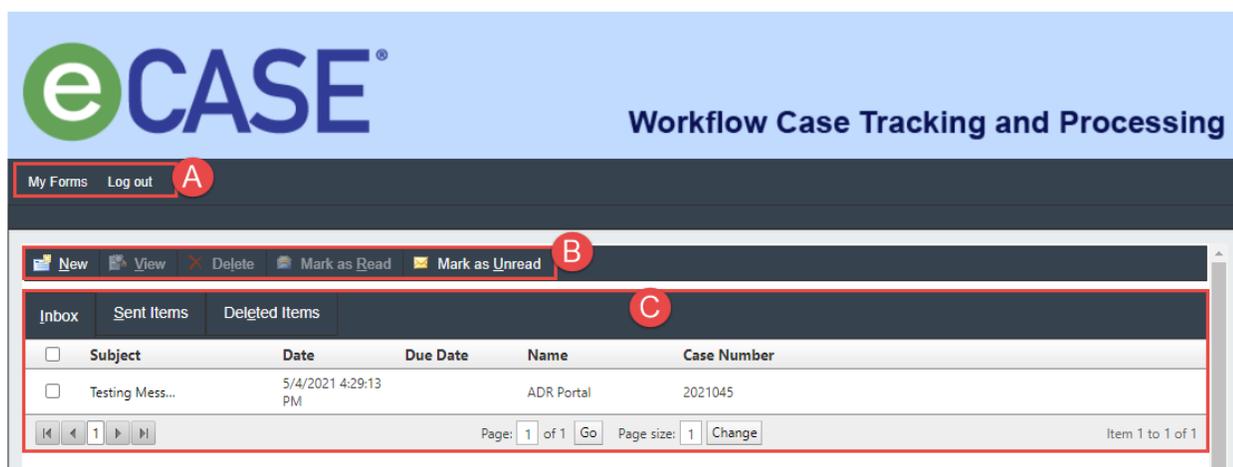
To access the Inbox, log in to the Portal and click **Inbox**.



The Inbox appears as shown below. See the Inbox Interface section for details about the inbox UI.

4.1 Inbox Interface

An example Inbox is shown below, and described in the following table:

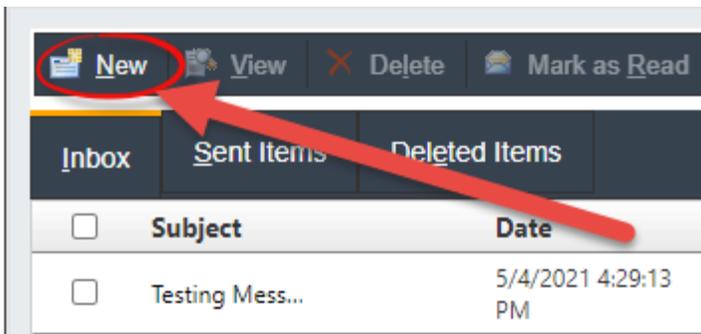


Ref	Element	Description
A	Navigation Bar	Use these buttons to return to the My Forms page, or to Log out .
B	Actions Bar	Take actions on items in your inbox by selecting a message from your (C) Inbox and selecting to View, Delete, Mark as Read or Mark as Unread . There is also the option to create a New message. Each of these actions are outlined in the following subsections.
C	Inbox Messages	Lists all messages, with options to display the full Inbox, Sent Items, or Deleted Items .

4.2 New Message

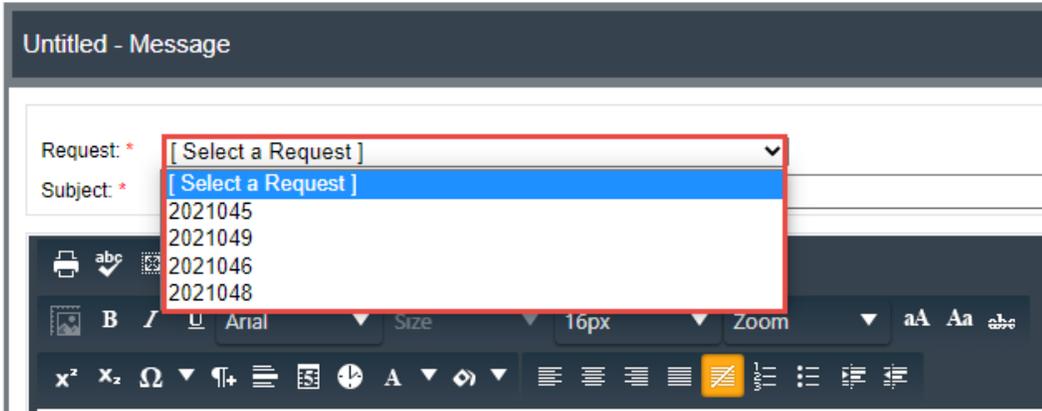
Follow the steps below to send a new message from the portal:

1. Log in to the Portal, and click **Inbox**.
2. The Portal refreshes and displays the *Message* workspace. Click **New**.

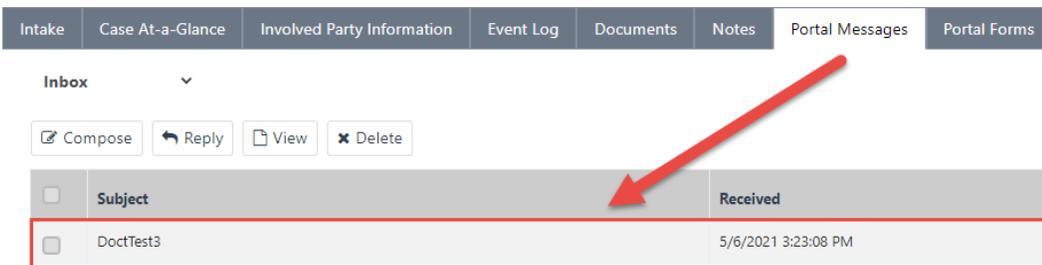


3. The Workspace updates to display the blank Message form. Select the **Request** from the drop-down list.





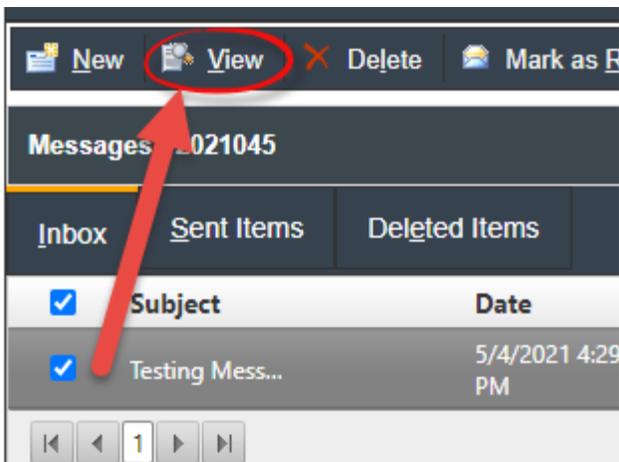
4. Enter the **subject** of the message in the field.
5. Configure the content of the message using the *text editor*.
6. Click **Select** to upload any attachments, if desired.
7. Click **Send** to distribute the message. The workspace returns to the inbox. The eCASE user responsible for the case receives the notification in the *Portal Messages* tab.



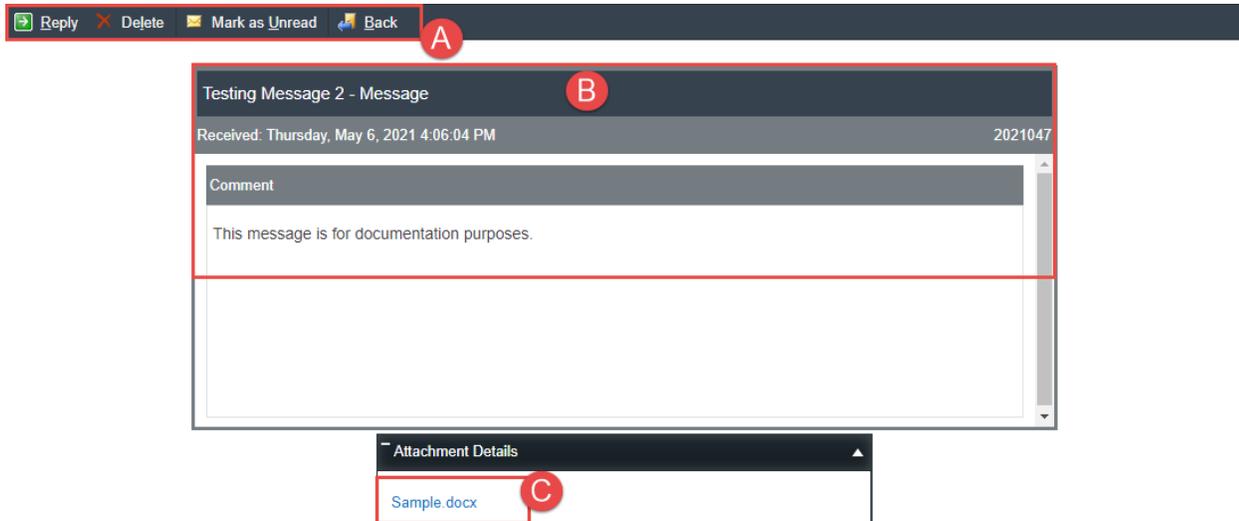
4.3 View Message

Follow the steps below to view a portal message:

1. Within the inbox, click the **checkbox** adjacent the desired message.
2. Click **View**.



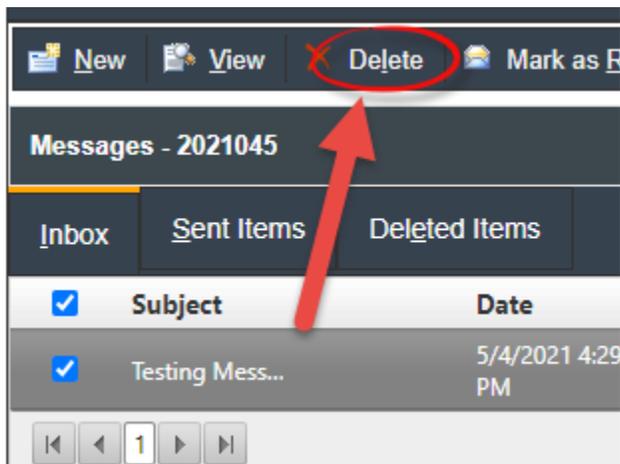
- The page refreshes to display the contents of the selected message. Within the message workspace there are: **(A)** a set of *actions* that can be applied to the message (Reply, Delete, Mark as Unread, and Back), **(B)** the *contents of the message*, and **(C)** the *Attachments Details* section, which contains a list of message attachments, if any were included.



4.4 Delete Message

Follow the steps below to delete a message:

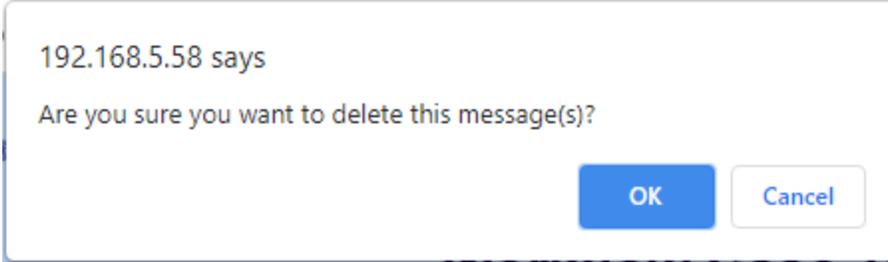
- Within the inbox, click the **checkbox** adjacent the desired message.
- Click **Delete**.



- A confirmation window appears. Click **OK** to permanently delete the message. The inbox refreshes and the selected message is removed.



Inbox



4.5 Change Inbox View

There are options to change your inbox view to view the full inbox, only sent items, or only deleted items. From your Inbox, click **Sent Items** or **Deleted Items** to view only sent messages or only deleted messages, respectively.

