eCASE ER/LR

Quick Start Guide

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ER/LR v3.1.0 Quick Start Guide

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Contents

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**.

Acronyms

All acronyms used in this document are defined in the following table:

Acronym	Definition
COTS	Commercial Off the Shelf
ER	Employee Relations
LR	Labor Relations
UI	User Interface

1 ER/LR Overview

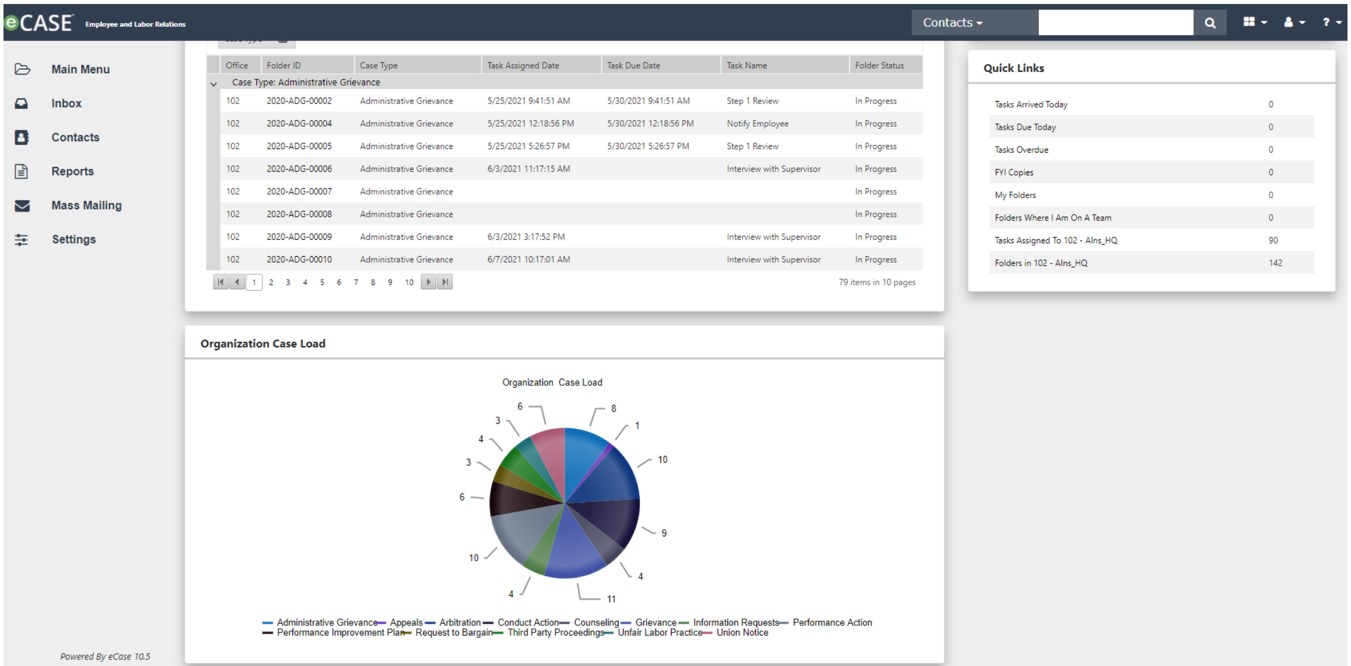
1.1 eCASE Employee Relations/Labor Relations

The eCASE Employee Relations (ER) Labor Relations (LR) system consolidates ER/LR activities under a single application, allows for users to log grievances, arbitration, and information requests, as well as employee-focused activities such as performance improvement plans and conducting reviews.

All ER and LR Module case forms can be accessed via a single location in the Launch Pad. All Employee Relations forms are contained in the Employee Relations Menu, while Labor Relations are contained in the Labor Relations Menu. Each module is described at a high level below:

- **Employee Relations**: The ER Forms allows ELR specialists to file cases on specific employees. These cases include Administrative Grievances, Conduct Action, Counseling, Performance Action, Performance Improvement Plans, and Third Party Proceedings.
- **Labor Relations**: Labor Relations deals with the labor workforce and the relationship between employees and management. These cases include Arbitration, Request to Bargain, Information Requests, Unfair Labor Practice, Grievance, and Notices to Union.
- **Investigation Inquiries**: This menu option allows authorized users to initiate an investigation inquiry, and capture information about this case as the inquiry progresses into an Anti-Investigation case, Management Inquiry, or an Administrative Investigation.
- **Configuration**: The Configuration menu option is available only to Administrators. This is not a conventional case form, and instead allows authorized users to change the terminology of fields within case folders. Additionally, it allows authorized users to hide/show fields on the case form.

The eCASE ER/LR Home Page is shown below. You'll find a deeper UI breakdown in the *eCASE UI* section of this document.



The *Home Page* serves as a jump-off point for using the eCASE ER/LR features. For information about the general eCASE interface, please refer to the *eCASE User Manual* (accessible under *Help* in the upper-right of the eCASE dashboard).

1.2 In This Guide

1.2.1 Scope

The purpose of this guide is to introduce the user to eCASE ER/LR, including all major functionalities and processes, to gain familiarity with the software and integrate it effectively into daily activities.

1.2.2 Content Breakdown

This guide is divided into the following topics:

- *ER/LR Overview*: An overview of the ER/LR System, eCASE, and this Reference Guide.
- *Getting Started*: Information on getting started using eCASE ER/LR, including application login, the ER/LR user interface, creating an ER/LR case and working with case attachments
- *Workflows*: How to move through the ER/LR Workflow.
- *Closing a Folder*: How to enter case notes.

1.2.3 Disclaimer

This guide is designed to support the Commercial Off-the-Shelf (COTS) version of eCASE ER/LR. Due to the configurable nature of the application, the user experience varies from what is presented here. These instructions are intended as a guide for the general application concepts, which can generally be applied across all instances regardless of the actual page content.

In addition, the screens presented in this guide are from the perspective of an Admin user. This serves the purpose of showing the full breadth of available options. Due to permissions structuring, most users are not able to see all the options and settings presented in this manual. What a user can see and do in the application depend on the configuration set by the system administrator. For questions about a specific instance of eCASE ER/LR, please contact your organization's System Administrator for eCASE ER/LR.

2 Getting Started

This section walks through the eCASE System Architecture and the basic UI, including the dashboard and folder pages where users spend the most time. Actions and buttons that are common across the system are described to help build familiarity with the system. This section also includes steps to create the various case types available in ER/LR, and working with case attachments.

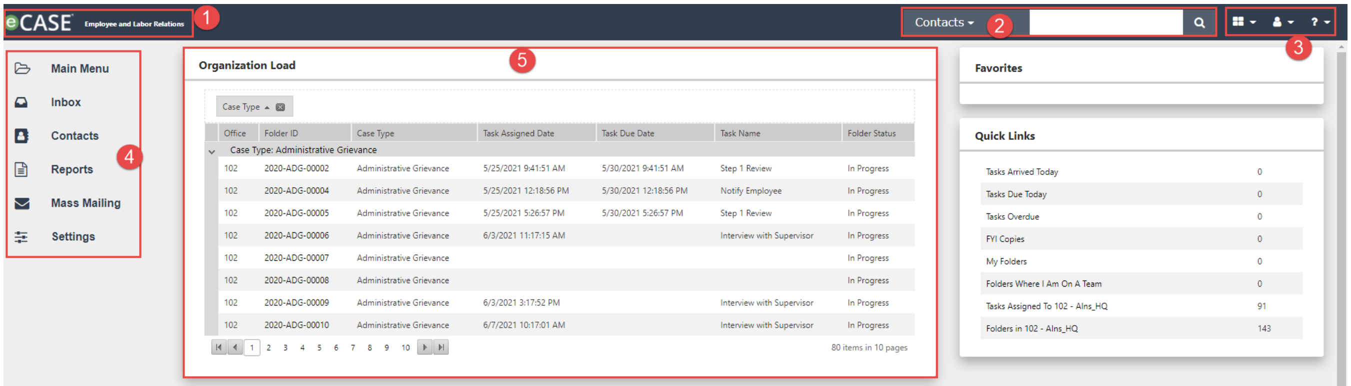
2.1 Login

To log in to eCASE, navigate to the eCASE Login screen. Enter a **(1) Username** and **(2) Password** in the Login screen and click **(3) Sign In**.

After login, the *eCASE ER/LR Home Page* appears. A breakdown of the Home Page UI is contained in the following section.

2.2 eCASE User Interface

eCASE ER/LR is built on the core eCASE platform that underpins multiple powerful task management solutions. Therefore, it shares certain elements of the basic eCASE platform that should be familiar to anyone who has used any other eCASE-based tools. An example of the eCASE ER/LR UI is shown below:



(!!) Note: The image above is provided as a sample and some aspects may not reflect each end user's specific eCASE environment.

The eCASE ER/LR Home Page displayed above is annotated to indicate features native to the Home Page:

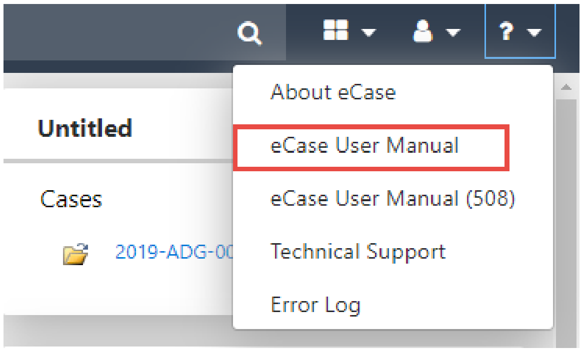
1. The *Application Title*. Users can click this icon to return to the Home Page from any window.
2. A *Quick Search* bar where users can perform quick searches on Case Folders, Documents or Contacts using a word search or an attribute search.
3. The *Application Selector* icon, a User Name dropdown list, and Help links.
4. The *Launch Pad*, containing options to create a new contract file, search, inbox, and vendors.
5. A *Dashboard* displaying open case folders and workflow tasks assigned to the user.

The *Launch Pad* and *Application Title* are standard parts of the eCASE UI and are static across all pages in the application. No matter what is happening within eCASE, these portions of the screen are always available.

The *Dashboard* provides module-specific information for easy access and visibility when first logging in to the application.

The *Application Selector* allows users to toggle between the eCASE Modules where they have access.

The eCASE platform has a separate user manual describing these common functions. Access this manual by clicking **Help > eCASE User Manual** in the top-right corner of the eCASE UI.



The eCASE User Manual appears, as shown below:

Use the **(1)** *Contents* tab to navigate the topics and view the content in the **(2)** *window*.

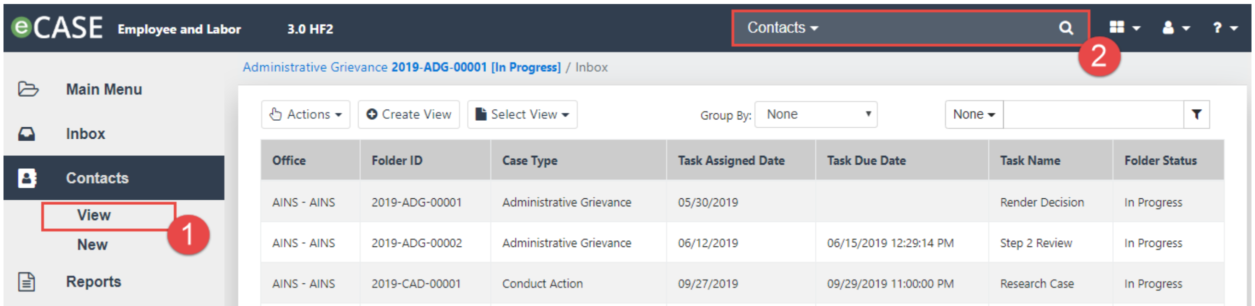
2.2.1 Contacts

Contacts are an important part of eCASE ER/LR. Employees and Representatives must exist as a Contact in eCASE ER/LR to be added to Employee Relations and Labor Relations activities.

2.2.1.1 Search Contacts

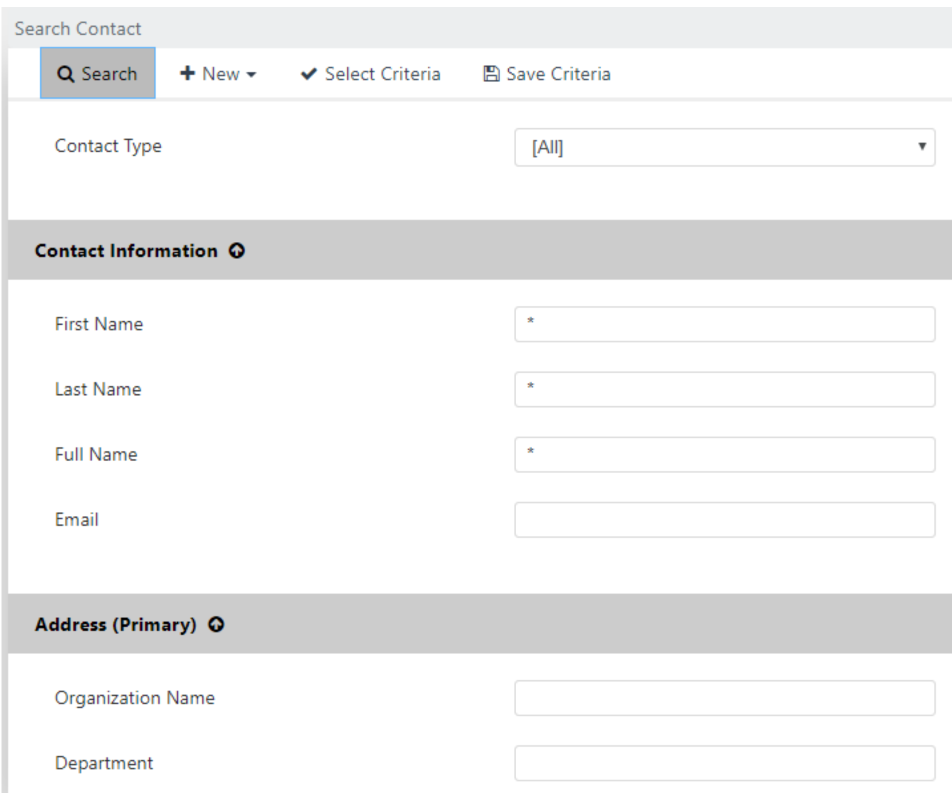
Search existing eCASE ER/LR Contacts in one of two ways:

- Via the **(1)** *Launch Pad*
- Via the **(2)** *Quick Search* bar



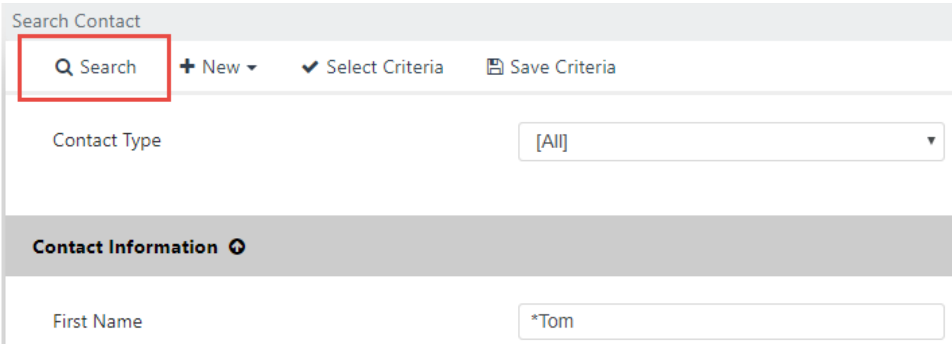
The **(1)** *Launch Pad* provides more robust search options, while the **(2)** *Quick Search* bar allows for quick searching of existing system contacts. See the *Quick Search* section for instructions on using Quick Search. To search using Contacts:

1. From the *Launch Pad*, click **Contacts > View > Search Contacts**. The *Search Contact* screen appears.

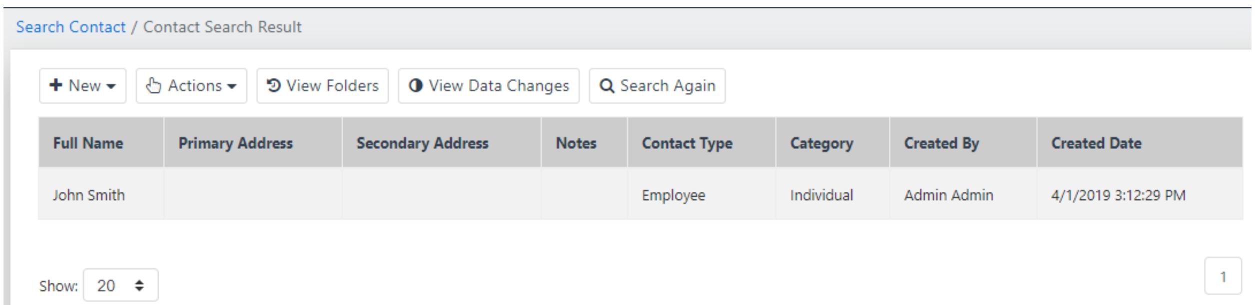


2. Use the fields on this page to narrow down search results. See *Wildcard Search* for information on using wildcards in search fields.
3. After entering identifying details, click **Search** to return a list of matching Contacts.

(!!) Note: Alternatively, click Search with all fields blank to return a list of all Contacts.



4. After clicking **Search**, the search results screen displays all matching Contacts, as shown in the example below:



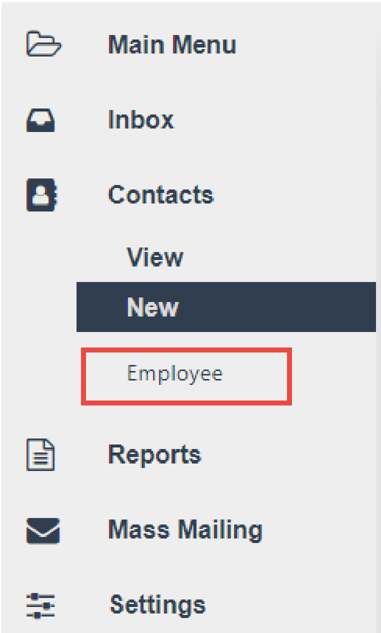
2.2.1.2 Create Contacts

Contacts are created in one of two ways:

- From the Launch Pad
- During case initiation

To create a contact from the *Launch Pad*:

1. Click **Contacts > New**, then select the **Contact Type**.



2. In this example, *Employee* is selected. After clicking **Employee**, the *Employee Information* screen appears.

Employee Information			
Position Title		Employee ID	
First Name		Middle Name	
Last Name		Service Computation Date	mm/dd/yyyy
Pay Grade		Suffix	
Program Office		Series	
Office		Pay Plan	
Region		Division	
Job Location City and State		Bargaining Unit	
Union		Entry on Duty	mm/dd/yyyy
Local Union		Email	

3. Fill in the fields on this page, providing as much detail as possible. When the form is filled out, click **Save** to save the newly-created contact.

(!!) Note: Contact details are automatically ported over to new case forms when creating cases, so providing details here can save time later.

4. The contact is now saved, and can be searched applied added to cases as needed.

2.2.2 Search Features

This section details some basic eCASE search features to assist in using the application.

2.2.2.1 Quick Search

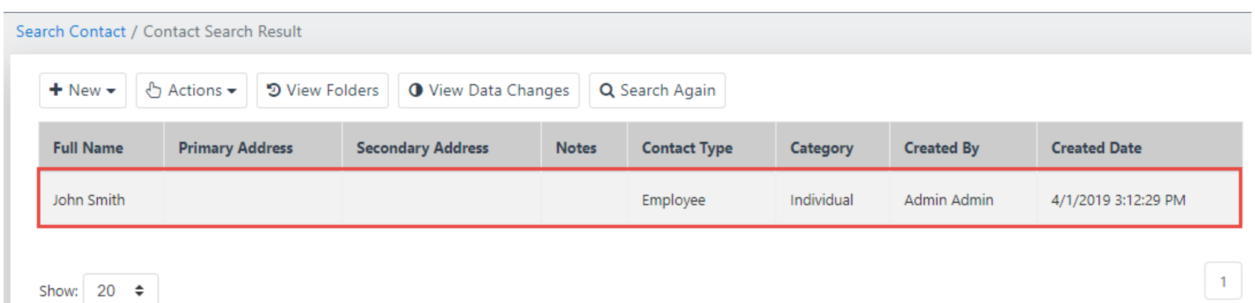
The *Quick Search* feature, located at the top of the screen in the *Navigation* bar, allows you to quickly search and access documents or contacts from anywhere within eCASE.

Using the drop-down list on the left of the *Search* field, select a field to quickly narrow down search results.

(!!) Note: The values present in this drop-down are configurable, and this field can be populated with the most frequently searched fields as needed.

As an example, to search for a specific contact, select **Contacts** from the drop-down list. This confines the search to the *Contacts* section.

In the *Search* field, type a search term for eCASE to use when looking within Contacts. When this field is filled, click the **Magnifying Glass Icon** to process the search. This brings up the *Contacts* screen and shows the search results:



2.2.2.2 Wildcard Search

eCASE provides a way to explore the contents of the Request and Request attachments utilizing user-defined queries. For example, users can search for the word "OPEXUS" in every case and attachment that contains it. After searching, all references to the word are listed in the search results.

Search for a case by entering a key word or description related to the case, then click **Search**. The *Search* screen displays every case matching the search criteria.

Wildcard Searches can also be used to search for a complete phrase. For example, the query *test case* finds the case that exclusively contain the phrase "test case."

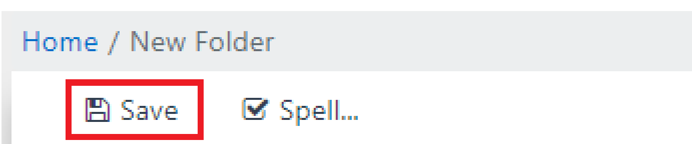
Alternatively, the following search combination can be used to find the same phrase:

- The search format “test case*” returns all results matching the terms starting with “test case”.
- The search format “*test case” returns all results matching the terms ending with “test case”.
- The search format “*test case *” returns all results exactly matching the term “test case”.

2.3 Creating a Case

eCASE ER/LR has consolidated the ER, LR, and Harassment Inquiry Modules into a single application, and all forms can be accessed via a single location in the Launch Pad. Click **Main Menu** to expand the selection options, and then click either **Employee Relations, Labor Relations,** or **Harassment Inquiries**. Any selection will open a list of forms from which the user can select. Each of these lists are described in later sections.

Once the initial details for the case have been entered, then the case can be saved. Once saved, the case will be given a unique case number and additional tabs will be available to help complete the case.



2.3.1 Employee Relations

The Employee Relations menu allows ER Specialists and ER Managers to file ER-related forms. The *Employee Relations* menu employs six out-of-the-box Case Types for filing ER-related forms. These ER Case Types include:

- Administrative Grievance
- Conduct Action
- Counseling
- Performance Action
- Performance Improvement Plan

- Third Party Proceedings

2.3.2 Labor Relations

The Labor Relations menu allows LR Specialists and LR Managers to file forms related to Labor Relations. The Labor Relations menu employs eight out-of-the-box Case Types for filing LR related forms. These case types include:

- Arbitration
- Bargaining
- Information Requests
- Unfair Labor Practice
- Grievance
- FLRA Petitions
- Union Notice
- Pre-Decisional Involvements

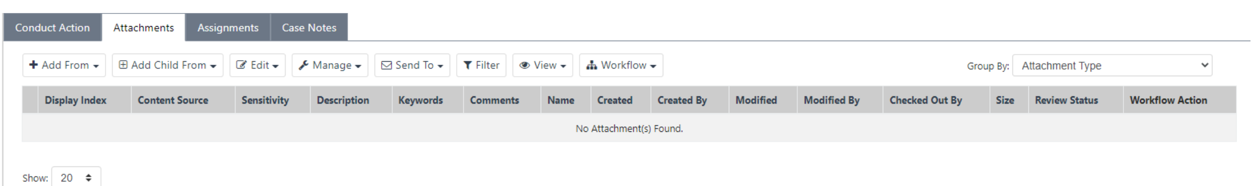
2.3.3 Harassment Inquiries

The Harassment Inquires menu allows an Employee Conduct and Compliance Officer (ECCO) to create an inquiry intake form. Once the inquiry is filled out the ECCO can determine if that case should be continued into one of the following cases:

- Anti-Harassment
- Administrative Investigation
- Management Inquiry

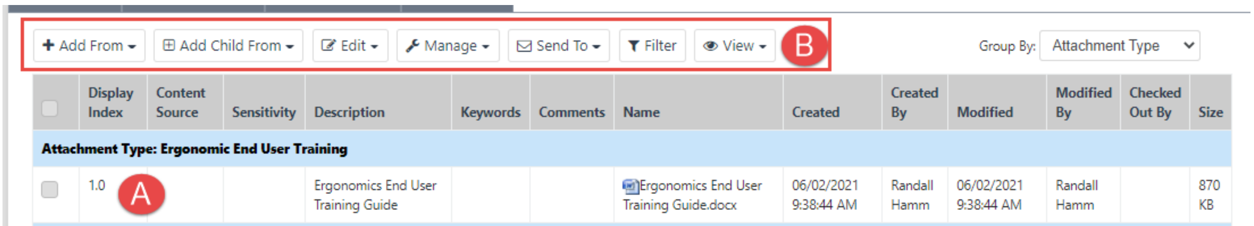
2.4 Working with Attachments

Manage documents and files associated with the EG Case from the *Attachments* tab.



2.4.1 Attachment Actions

You can perform actions upon attachments within the *Attachments* tab by clicking the **(A) checkbox** in the leftmost column (this selects the attachment) and clicking the desired drop-down list or button within the **(B)** *Action Bar*. If a drop-down list is selected, the user must then select an option from the list:

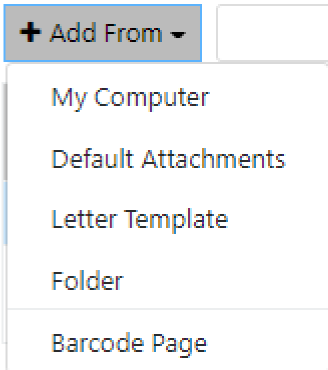


The selections on the *Action Bar* are described in the following table:

Selection	Description
Add From	Upload attachments to the *Attachments Workspace*.
Add Child From	Add child level attachments to attachments already within the *Attachments Workspace*.
Edit	Edit selected attachments. When editing an attachment, it is “checked out” and other users are not able to edit the attachment until it is checked in.
Manage	Manage, alter, and delete attachments, properties, and metadata.
Send To	Distribute an attachment via email.
Filter	Filter the contents of the *Attachments* tab.
View	Alter the filing structure view in the *Attachments* workspace.

2.4.2 Add to Attachments

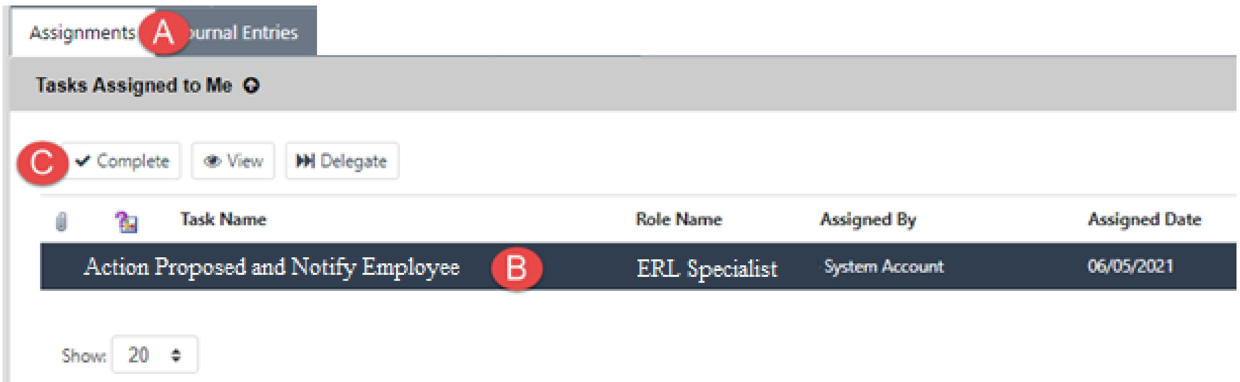
The *Add From* feature allows the user to add attachments to the *Attachments Workspace* from the following locations:



Selection	Description
My Computer	Add files from your local desktop.
Default Attachments	Add files from Default Attachments included with EG Cases.
Letter Template	Generate an attachment from your application's Letter Templates.
Folder	Locate a document from another case folder in your EG module.
Barcode Page	Add attachments via bulk scanning, when licensed to use the bulk scanning module.

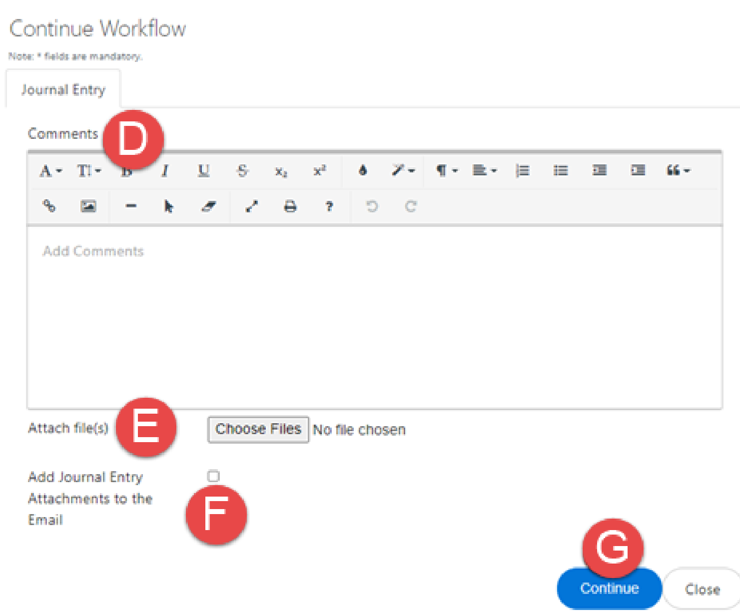
3 Advancing the Workflow

At various points in ER/LR request processing, it will be required to advance the workflow to capture that events have occurred. See the steps below to move to the next step in the workflow:



Navigate to the **(A)** *Assignments* tab. From this tab, select the current **(B) Task** under *Tasks Assigned to Me*, then click **(C) Complete** to log the action.

The *Continue Workflow* screen appears, as shown below.



There is space to add a *Journal Entry* in the **(D)** *Comments* field. There is also space to **(E)** *Attach Files*, and the option to **(F)** *Add Journal Entry Attachments to the Email*.

Click **(G) Continue** to log the entry and continue the workflow.

4 Closing a Case

After an ER/LR case moves through the workflow and all data has been captured, the case can be closed. To close an ER/LR case, select **Actions** from the top menu and click **Close**.

(!!) Note: After a folder is closed, it cannot be edited unless the case is reopened.