

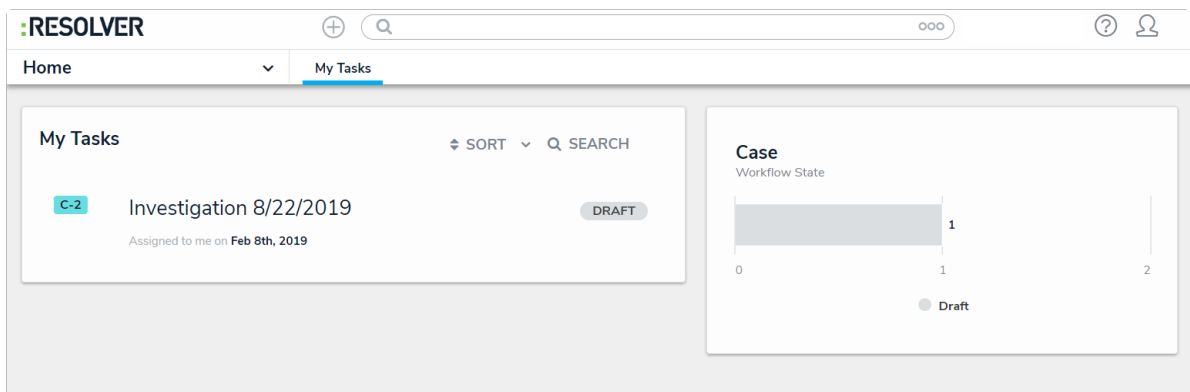
Transition a Case

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When a new case is created, it's automatically put in the **Draft** workflow state. The following will show you how to transition a case to the next workflow state. This can be used to move a case from **Draft** to **Open**, or **Open** to **Closed**. Any case you create will appear on the [My Tasks](#) page until it has been closed.

To transition a case to the next workflow state:

1. Log into a user account from the **Case Manager** user group.
2. Go to the [My Tasks](#) page and click a case to open the **Case Review** form. Cases can also be opened from **Incident Management > Cases**.



A draft case on the My Tasks page.

3. **Optional:** Click the title of the case (e.g., Investigation 8/22/2019) to make changes as needed, then click away from the title to save your changes.

The screenshot shows the 'Case Review' form in the Resolver application. The title 'Investigation 8/22/2019' is at the top. Below it, the 'Details' section contains several fields: 'Business Unit' (Business Unit 3), 'Priority' (Medium), 'Status' (Draft), 'Case Focus' (Connie Test), 'Case Manager' (Casey Case Manager), 'Case Type' (Security Investigation), 'Open Date/Time', and 'Closed Date/Time'. At the bottom, there's a 'Related Incidents' table with columns: Name, Primary Incident Type, Incident Start DateTime, Incident End DateTime, Net Loss, and Workflow State.

The Case Review form.

4. Add or change the **Business Unit**, **Case Focus**, or **Case Manager** by clicking the field,

then typing keywords to display a list of available options, then clicking to select the appropriate option.

5. **Optional:** Click **Priority** to select a different priority level.
6. **Optional:** Click the search bar below **Related Incidents**. Begin typing the name of a related incident, then click to add the incident to the case.
7. Click the **+** icon in the **Investigation** field, then click the tabs to optionally add new information to the case. Click **+** to open the creation palette in the desired tab, then complete the fields as required. You may not be able to update certain tabs, depending on your user permissions. To add an attachment, click **Attachments**, then begin typing in the search bar to find an existing file, or click **+** to add a new file from your machine.

The screenshot shows the Resolver application interface. On the left, the 'Investigation' tab is active, with sub-tabs for 'Involvements', 'Chronology', and 'Interviews'. The 'Chronology' sub-tab is selected. Below the sub-tabs, there is a 'Case Chronology' section with a table for logging events. The table has columns for 'Name' and 'Log Date/Time'. Below this is an 'Outcomes' section with a 'Summary Date' field and a 'Summary of Findings' section. On the right, a modal titled 'CREATE CASE CHRONOLOGY' is open. The modal has a blue header and a close button. The main content area is titled 'Create a New Log' and contains several form fields: 'Log Name' (text input), 'Start Date/Time' (calendar/time picker), 'End Date/Time' (calendar/time picker), 'Log Date/Time' (calendar/time picker), 'Cost (\$)' (text input), 'Event Source' (text input), and 'Source Date' (calendar/time picker). A blue 'CREATE' button is located at the bottom right of the modal.

*Click **+** in the Chronology tab to open the creation palette.*

8. **Optional:** Add a summary of your investigation findings. Click **Summary Date** to open the calendar and select the correct date. Then click **Summary of Findings** and add information on the investigation results and case disposition.
9. Click one of the following buttons:
 - **Open:** Move the case to the **Open** workflow state.
 - **Close:** Move the case to the **Closed** workflow state.
 - **Done:** Save your changes without transitioning the case.