Spot Case Management Software Manual

Table of Contents

Table of Contents
Inbox / All Cases
Case Detail View
- Tab: Audit trail
- Tab: Communications
- Tab: Forms
- Tab: Notes
- Tab: Internal comments
- Tab: Files

Case Agent
Analytics
Settings
- Tab: Users
- Tab: Teams
- Tab: Layouts
- Tab: Audit log

Account Settings

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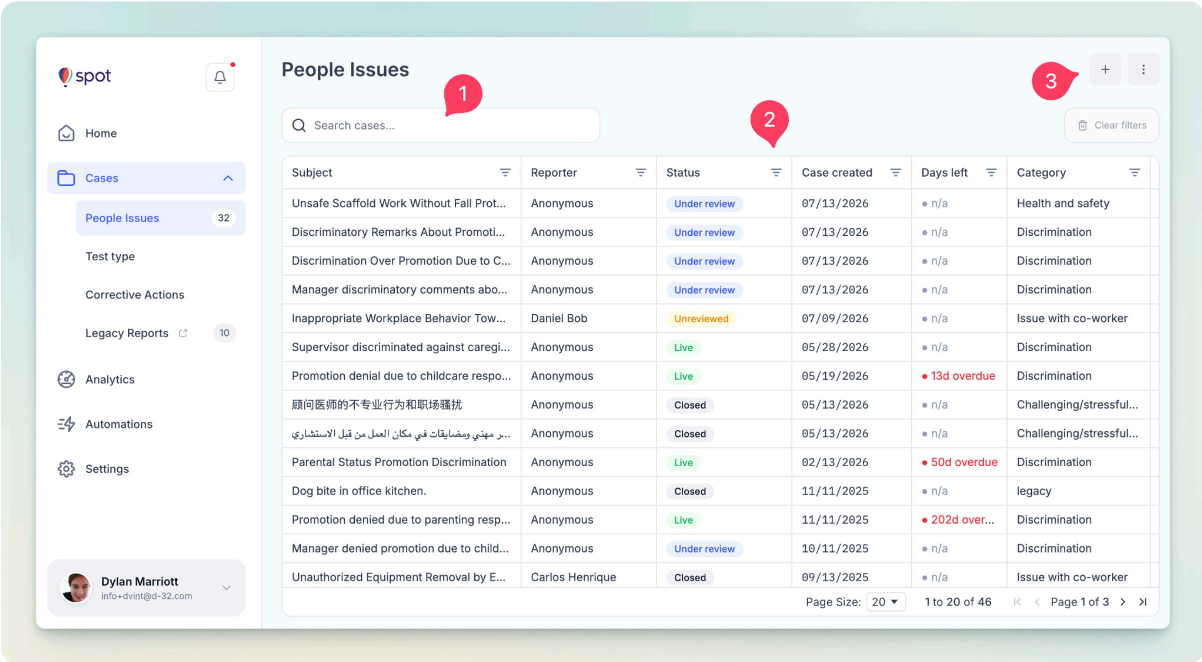
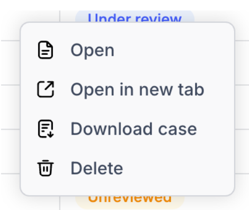
Inbox / All Cases

In the left sidebar you'll find a grouped navigation item called **Cases**, which contains each case type your organization has configured, for example **People Issues**. Click a case type to see all cases of that type.



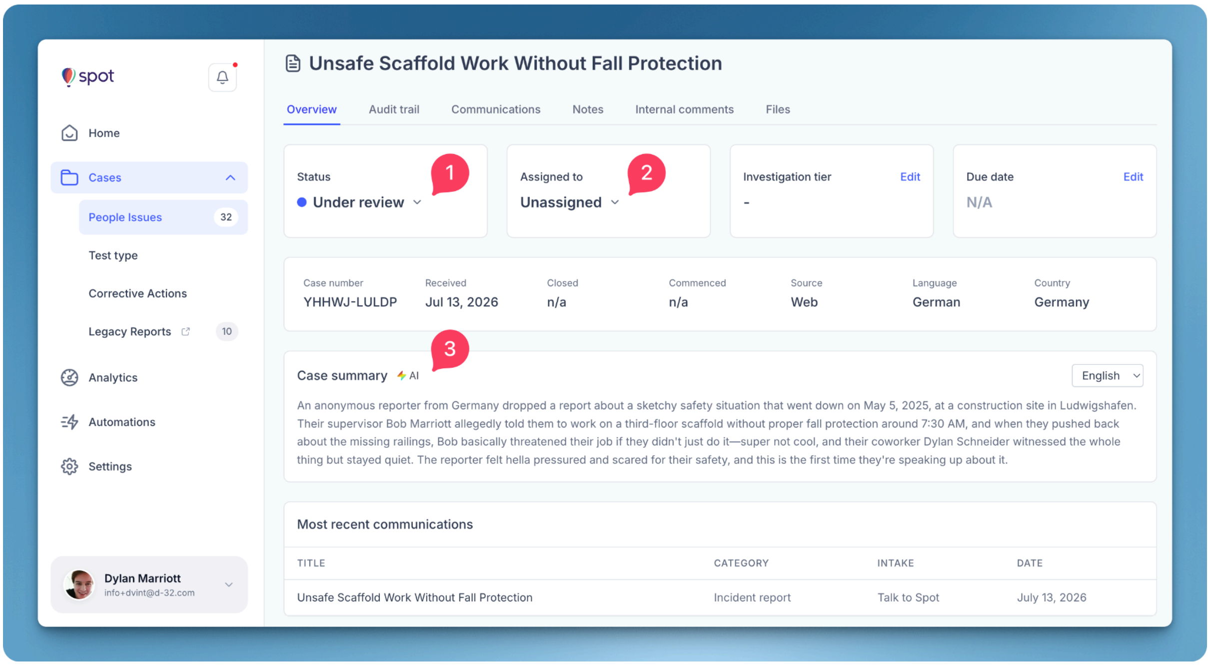
(1) The search bar lets you search cases by ID, subject, or status. Note that this doesn't perform a full text search on a case's content. For that, we recommend using the Case Agent on the Home screen.
(2) Most columns in the table can be filtered. This is a good way to show only cases with a specific status, date range, or assignee. The columns can also be reordered.
(3) The plus button lets you add cases manually, either via email, chat, or form. The three dot button gives you the option to export all cases as a spreadsheet. To download a single case, use the right click option described below.



Right click a table row to download the case as a PDF or to delete it. The PDF won't include the case's file attachments, those need to be downloaded separately from the [Files tab](#).

Case Detail View

Opening a case takes you to the case detail view. This gives you an overview of the case and is where most case specific work happens. The tabs at the top are explained in more detail further down. Note that this view is customisable, so it might look slightly different depending on your organization's setup.



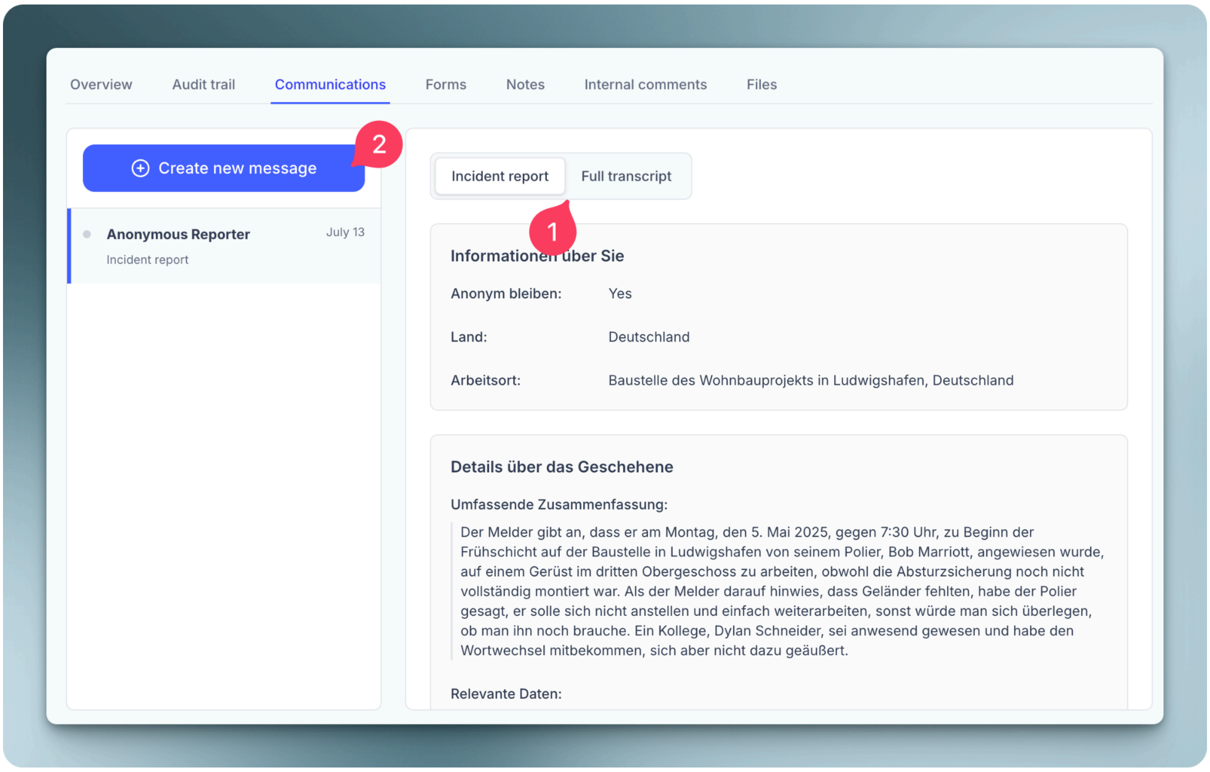
(1) A case can have different statuses. These are customisable: simpler Spot setups just have Open and Closed, while more complex setups can have a range of statuses to track cases across teams and workflows.
(2) A case can be assigned to individuals or teams. This helps track who's currently responsible for it.
(3) The case summary gives an overview of the case's content and the work performed on it. It's updated frequently, so it always reflects the current state of the case.

Tab: Audit trail

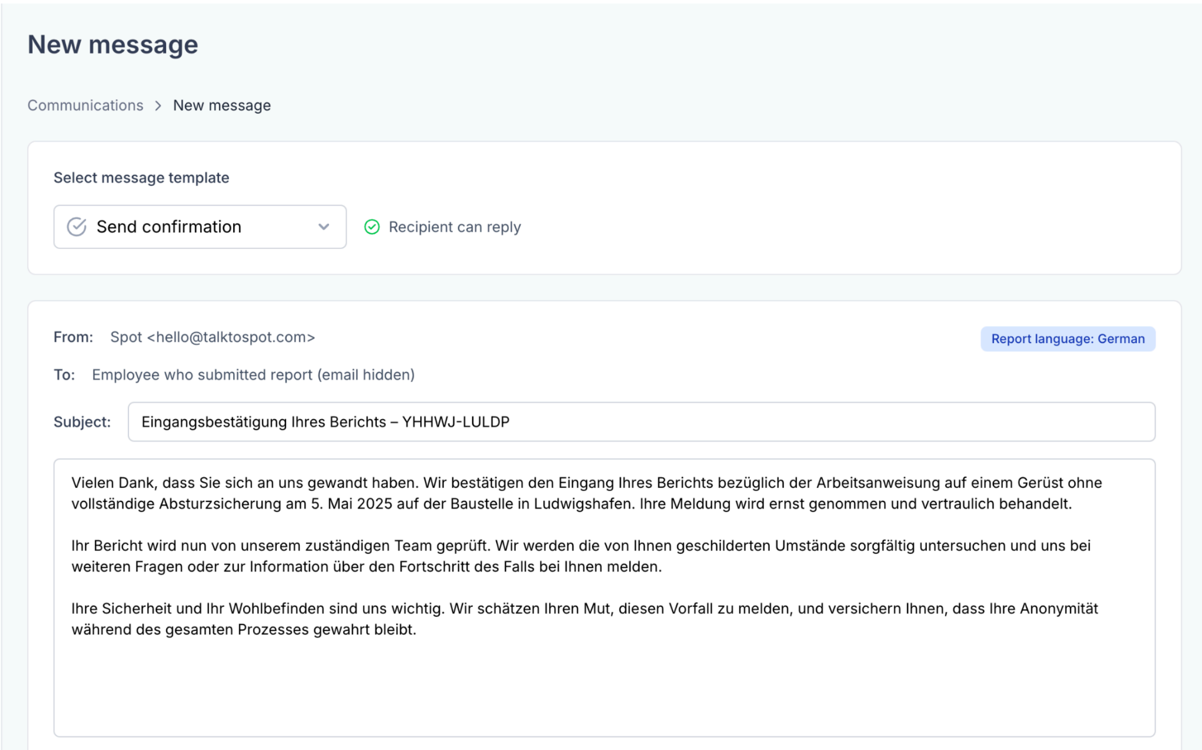
The audit trail lists every action performed on the case in chronological order. It's also included in the case's PDF export.

Tab: Communications

The Communications tab is where the original report lives, along with any further communication with the reporter. Go here to read the full report or to send the reporter a message..



(1) 1. If the reporter chose to include the full transcript of the interview, an option appears here to toggle between the report and transcript view. If the report came in via email, the full email can be viewed here.
(2) 2. To send the reporter a message, click the blue "Create new message" button. This brings up the following screen:

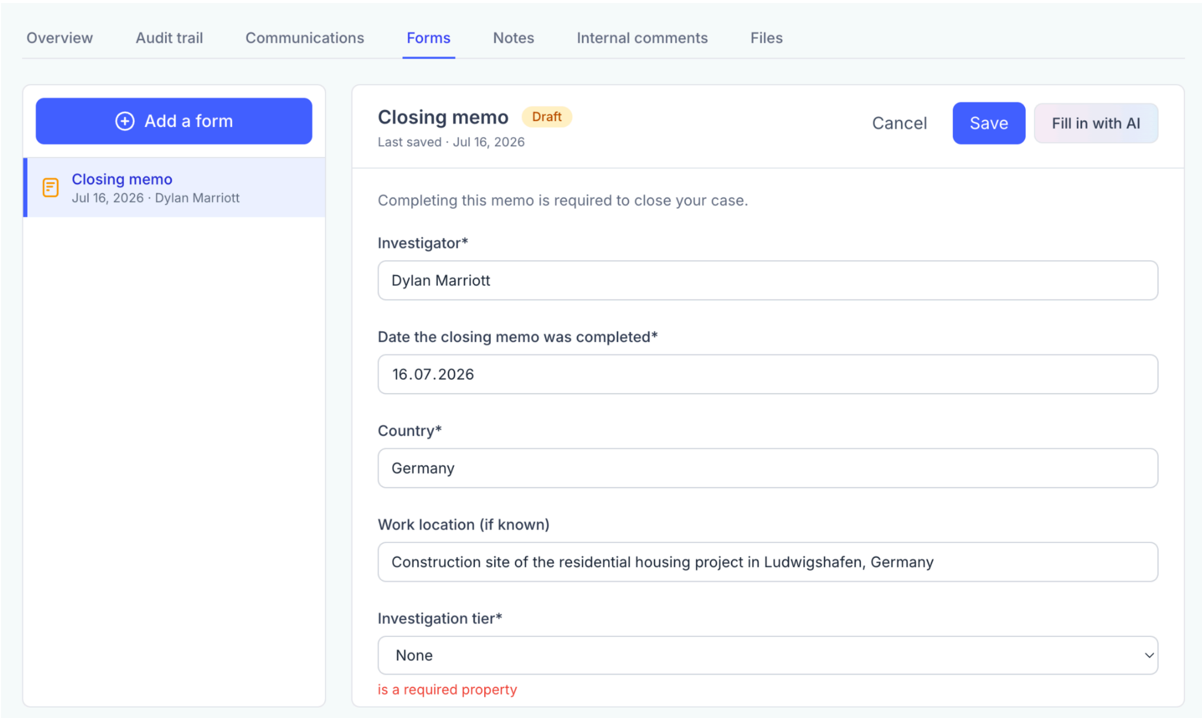


At the top you can select a message template. Most templates show a text field below where you compose the message, prefilled with an AI generated draft.

If you choose the "Ask a follow-up question" template, a different interface appears that lets you pick follow-up questions or write your own. The reporter can then reply to them, staying anonymous if they choose to.

Tab: Forms

If your workflow requires structured data collection while working on a case, Spot's forms can help gather that information. An example would be a closing memo that summarises the work a case management admin has done.



Please get in touch if you'd like forms set up for your instance.

Tab: Notes

Notes give you a collaborative space for interview notes, assessments, and other free text documentation.

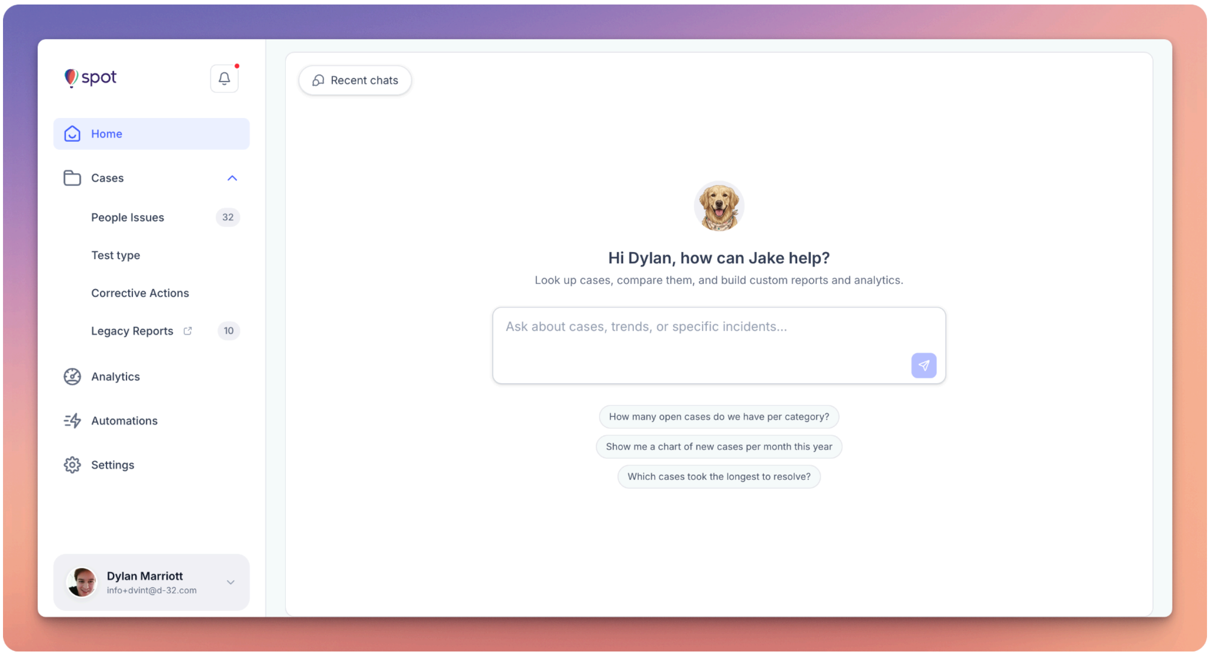
Tab: Internal comments

Use this space to leave a quick note for a colleague by tagging them (type @). Any tagged admins get an email notification about the comment.

Tab: Files

The files tab contains both files uploaded by the reporter and files admins add in the case management system. You can upload additional files from this tab as well as download any files by clicking on the file name.

Case Agent



The Case Agent has access to every case in the system and is a good way to find specific ones, since it draws on more of a case's details for retrieval. It can find similar cases, or cases involving the same witness or perpetrator. You can also ask it for custom graphs, for example "cases broken down by category for Q2".

Analytics

The Analytics page gives you an overview of your case data. Each case type has its own tab at the top, so the numbers you see always relate to the case type you've selected.

Use the date range picker (set to "All time" by default) to limit every chart on the page to a specific period.

"New cases created" shows case volume over time. The Breakdown dropdown controls the time interval, and Split by lets you break the bars down by another attribute, for example category or status. "Cases by status" and "Cases by category" show how your cases are distributed, and the filter icon on each lets you narrow down which values are included. "Average time to first response" and "Average time to close" track how quickly cases are picked up and resolved, again with a Breakdown dropdown to control the time interval.

Every chart has a download icon in its top right corner to export the underlying data.

Settings

The Settings page is where you manage who has access to your Spot instance and how it's set up. Note that personal notification preferences and your own account settings live elsewhere, use the Account settings link at the top to get there.

Tab: Users

This tab lists everyone with access to your instance, along with their team membership and status. Pending means the user has been invited but hasn't accepted yet. Use the "Add user" button to invite someone new, or Edit to change an existing user's teams. In the edit dialog you can also mark a user as Superadmin, which gives them access to all teams and administrative functions, and resend the invite if they never received it.

Tab: Teams

Teams let you group users and control which case types they work on. Smaller organizations often don't use teams at all, which is perfectly fine. If you want more complex routing, get in touch and we'll set it up for you.

Tab: Layouts

Layouts define how the cases table and case detail view are put together for each case type: which columns appear, which tabs are shown, and which widgets sit at the top of a case. A layout can then be assigned to a team. We usually configure layouts for you as part of your setup, so reach out if you'd like something changed.

Tab: Audit log

The audit log works like a case's audit trail, but for actions across your whole instance, for example logins, admin changes, or user removals. Use the search field and the event dropdown to narrow things down.

Account Settings

This is where your personal settings live. You can get here from the link at the top of the Settings page or from your name in the bottom left.

General
Upload a profile picture (PNG, JPG, GIF or WebP, max 1MB) and change the email address your account uses. Use "Reset password / two-factor authentication" to set a new password or reconfigure 2FA, and "Reset preferences" to put your settings back to their defaults.

Notifications
Notification preferences are set per case type, so pick the relevant tab first. For each event you can decide whether you want an email, an in-app notification, or both. Some notifications also have a scope dropdown, which controls when they apply, for example only for cases assigned to you.

The Legacy notifications toggle covers notifications for legacy reports, and Previous Logins shows a history of recent sign-ins to your account.