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# INVESTIGATION REPORT

Complete

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**Investigation Reference:** SAMPLE-0001

**Investigation Type:**Harassment

**Date:** Mar 9, 2026

**Northwind Trading Co. (Sample)**

Prepared by Pat Morgan

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## Investigation Overview

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**Investigation Reference:** SAMPLE-0001

**Investigation Type:** Harassment

**Status:** Closed

**Opened:** Mar 2, 2026

**Closed:** Mar 9, 2026

**Case Manager:** Pat Morgan

**Organization:** Northwind Trading Co. (Sample)

**Report Generated:** Mar 9, 2026, 12:00 PM

**Participants:** 3 total, 3 submitted

### Description

ILLUSTRATIVE SAMPLE — not a real investigation. A report manager received a concern that an employee experienced unwelcome conduct from a colleague during and after a regional sales offsite. This fictional report demonstrates the structure, tone, and sections of an Arvanic investigation report.

## Participation Status Breakdown

Participant	Role	Status	Invited	Submitted
Jordan Avery	Complainant	Submitted	Mar 2, 2026	Mar 5, 2026
Riley Brooks	Responding Party	Submitted	Mar 2, 2026	Mar 5, 2026
Sam Delgado	Witness	Submitted	Mar 2, 2026	Mar 5, 2026

## Role Index

*Role labels used in the Executive Summary are mapped to participant names below.*

Label	Participant
Complainant 1	Jordan Avery
Responding Party 1	Riley Brooks
Witness 1	Sam Delgado

## Executive Summary

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This illustrative report concerns a reported concern of unwelcome conduct involving Complainant 1 and Responding Party 1 during and after a regional sales offsite. Complainant 1 reported persistent personal comments at a team dinner followed by late-night messages that continued the following morning. Responding Party 1 recalled the dinner as friendly and characterized the messages as work-related, stating the conduct stopped once raised. Witness 1 observed that the dinner conversation became one-sided and that Complainant 1 appeared uncomfortable and left early. The accounts align on the timeline and the existence of after-hours messages, and differ on the nature and effect of the conduct.

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# Table of Contents

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1. Investigation Overview .....	1
2. Participation Status Breakdown .....	2
3. Executive Summary .....	3
4. Table of Contents .....	4
5. Detailed Investigative Summary .....	5
6. Interview Transcripts .....	6
7. Exhibits .....	7
8. Points of Difference and Outstanding Questions .....	8
9. Next Steps .....	9
10. Version History .....	9
11. Audit Trail .....	10

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## Detailed Investigative Summary

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### Timeline of the offsite and after-hours contact

Jordan Avery and Riley Brooks attended the same regional sales offsite and both describe a team dinner on the evening in question. Avery reports that comments at dinner were persistent and personal and that late-night messages followed and resumed the next morning. Brooks recalls the dinner as a friendly team event and describes the messages as relating to a client follow-up. Both accounts place the contact in the same window and confirm that messages were exchanged after the dinner.

### Nature and effect of the conduct

Avery describes the conduct as unwelcome and states a request to stop was not immediately honored. Brooks states no offense was intended and that the conduct stopped once the concern was raised. Sam Delgado, seated nearby, observed that the conversation became one-sided and that Avery appeared uncomfortable and left earlier than the group. The participants' accounts differ primarily on how the conduct was intended and how it was received.

### Summary of Key Findings

The participants agree on the timeline and the existence of after-hours messages and differ on the intent and effect of the conduct. The witness account corroborates the complainant's description of discomfort at the dinner. Outstanding items include the content of the after-hours messages and whether a request to stop was made before the following morning.

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## Interview Transcripts

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### Jordan Avery (Complainant 1)

#### Background

**Q: Please describe your role and how you interact with the people involved.**

A: I am a regional account representative. I work alongside the responding party on the same sales team and we both reported to the same manager at the time of the offsite. [Mar 5, 2026, 12:30 PM CST]

#### The Incident

**Q: Describe what happened during and after the regional offsite.**

A: During the group dinner the comments were persistent and personal. Afterward there were several late-night messages that made me uncomfortable. I asked for them to stop and they continued the next morning. [Mar 5, 2026, 12:30 PM CST]

### Riley Brooks (Responding Party 1)

#### Background

**Q: Please describe your role and how you interact with the people involved.**

A: I am a senior account representative on the same team. We attended the same regional offsite. I recall the dinner as a friendly team event. [Mar 5, 2026, 12:30 PM CST]

#### The Incident

**Q: Describe your recollection of the offsite dinner and any messages afterward.**

A: I believe the conversation at dinner was light and work-related. I sent a few messages that evening about a client follow-up. I did not intend any of it to be unwelcome and I stopped once that was raised. [Mar 5, 2026, 12:30 PM CST]

### Sam Delgado (Witness 1)

#### Observations

**Q: What did you observe at the offsite dinner?**

A: I sat a few seats away. I noticed the conversation became one-sided and the complainant looked uncomfortable and left earlier than the rest of the group. [Mar 5, 2026, 12:30 PM CST]

## Exhibits

Title	Provided By	Authored By	Uploaded
Regional Offsite Agenda	Case Manager	Unknown	Mar 2, 2026

### Summaries

#### **Regional Offsite Agenda — authored by Unknown**

A one-page agenda for the regional sales offsite listing a team dinner on the evening in question. Establishes the timeline and attendance context referenced by participants.

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## Points of Difference and Outstanding Questions

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### Points of Difference

#### Nature of the dinner conversation

**[Complainant\_1]:**

"The comments were persistent and personal."

**[Responding\_Party\_1]:**

"The conversation at dinner was light and work-related."

*Note: The participants characterize the same conversation differently. A witness account is available and may help develop this point.*

### Outstanding Questions

#### Content of after-hours messages

Question: What did the after-hours messages actually say, and is a record of them available?

*Why it matters: Both participants agree messages were exchanged but describe their content differently. The messages themselves were not provided.*

### Summary

The accounts align on timeline and the existence of messages, and diverge on the content of the dinner conversation and the messages. Reviewing the messages and a follow-up on the timing of any request to stop would help develop the record.

## Next Steps

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### Recommended Fact-Development Steps

- **HIGH — Document Request**

Request copies of the after-hours messages exchanged on the evening of the offsite and the following morning.

*Why: Both participants reference the messages but describe their content differently; the messages were not provided.*

- **MEDIUM — Follow Up Interview**

Conduct a brief follow-up with the witness regarding the sequence of events at the end of the dinner.

*Why: The witness observed the complainant leaving early and may be able to place the timing of the conduct.*

### Procedural Recommendations

- **MEDIUM — Policy Review**

Review the organization's anti-harassment and after-hours communication expectations against the conduct described.

*Why: The conduct spans an offsite event and after-hours messaging; applicable policy context helps frame appropriate next steps.*

*This sample illustrates how Arvanic surfaces fact-development and procedural next steps. It is not legal advice and does not reach a conclusion about what occurred.*

## Version History

Report ID	Generated	Participants	Label
r-sample...	Mar 9, 2026	3/3	Complete

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## Audit Trail

Action	Actor	Timestamp
Investigation Created	Pat Morgan	Mar 2, 2026, 9:00 AM
Invitation Sent	Pat Morgan	Mar 2, 2026, 9:00 AM
Interview Submitted	Participant	Mar 5, 2026, 12:30 PM
Report Generated	Pat Morgan	Mar 9, 2026, 12:00 PM