Quick Start guide

iCasework™ UsefulFeedback on-demand allows organisations to manage and learn from complaints and other feedback. This guide explains the steps involved in setting up your service and provides a quick introduction to its main features. Please refer to the online help system for a complete explanation of all service features.

The sign up process for UsefulFeedback! consists of three simple steps. Each step is explained at length in this guide.

1. Register an iCasework account. You will be prompted to provide a username and password as well as a unique account identifier. The account you create provides access to the iCasework support portal and to your on-demand service . The identifier you choose is important as it will form part of the URL you will use to access our service: http://admin.icasework.com/youraccountid.

2. Activate your account by clicking on the link in the confirmation email.

3. Log in to the UsefulFeedback! service with the username and password you provided during registration . Upon first login, you will be prompted to carry out the initial setup using our easy to use configuration wizard. Configuration usually takes between 5 – 15 minutes depending on the type and size of your organisation. You will need details of your organisation structure for this - for example when you select "Hotels" as your industry template, you will require a list of all hotels in your organisation. Your service will automatically adopt the best practice configuration for the industry sector selected.

Pre-requisites for using the UsefulFeedback! service include:

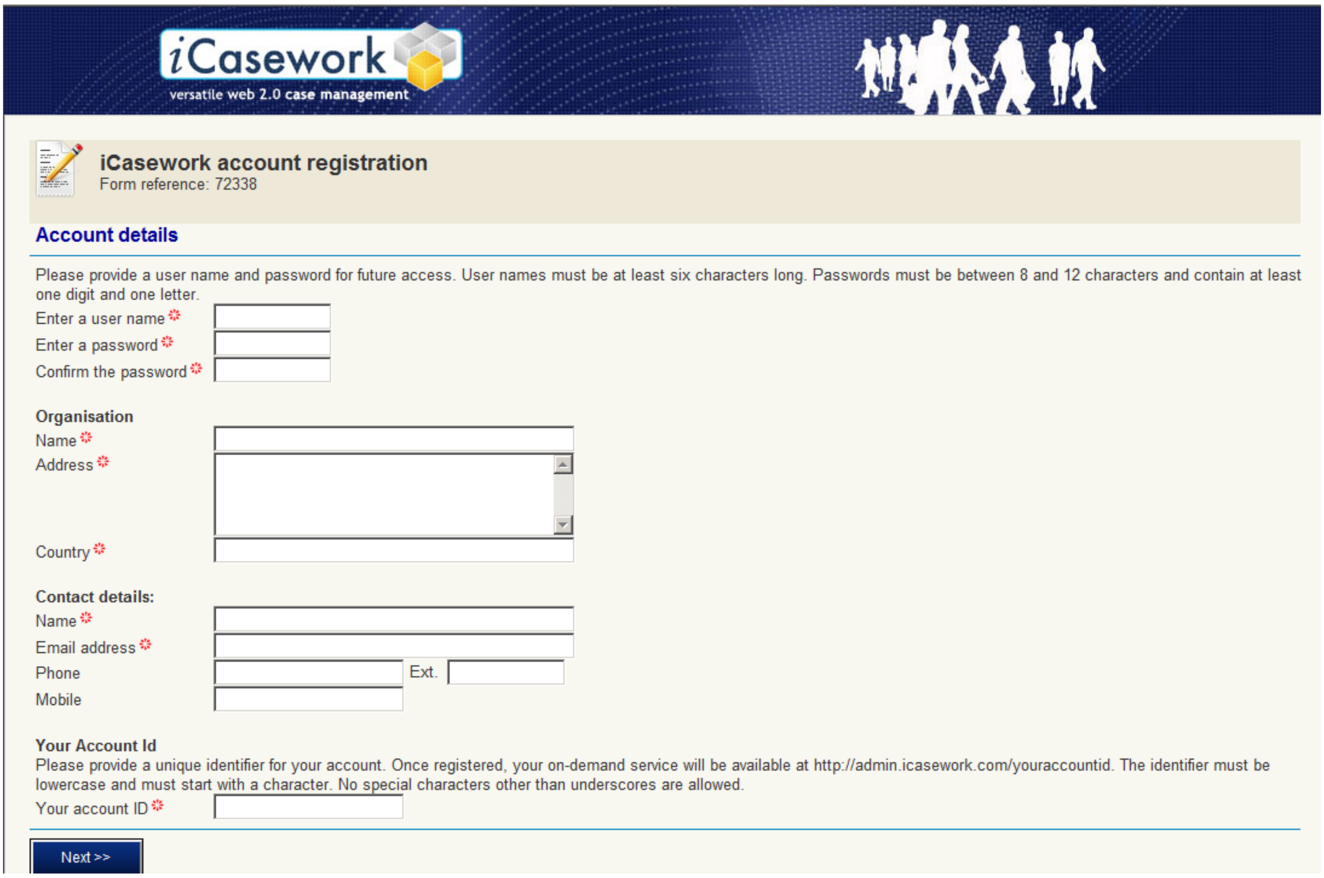
- A relatively modern web browser
    - Microsoft Internet Explorer 6 or later.
    - Mozilla Firefox 2 or later.
    - Apple Safari 3 or later.
    - Google Chrome 3 or later.
    - Opera 8 or later.
- Cookies and javascript enabled.
- If you wish to utilise Microsoft Word (2003 or later) for editing letters, you must ensure that your work station is configured to open Word in a new browser window. This is the default behaviour in MSWord 2007 or later but not in MSWord 2003.

  You will also need to ensure that MSWord trusts the iCasework macro. Select Tools -> Macro -> Security and click on the **Trusted Publishers** tab. The only thing that should be checked is **Trust all installed add-ins and templates**. Next, click on the **Security Level** tab, you can set this at Medium or High but NOT Very High.
- If you wish to use OpenOffice.org 2.0 or later for editing letters, select Tools -> Options -> Security-> Macro -> Security and set this to Low.
- To scan documents directly into the application, ensure that your scanner is Twain compatible.

Quick Start guide

Register an iCasework account

Provide login details, organisation details, contact details and an account identifier when prompted:


iCasework
versatile web 2.0 case management

iCasework account registration
Form reference: 72338

Account details

Please provide a user name and password for future access. User names must be at least six characters long. Passwords must be between 8 and 12 characters and contain at least one digit and one letter.

Enter a user name
Enter a password
Confirm the password

Organisation
Name
Address
Country

Contact details:
Name
Email address
Phone Ext.
Mobile

Your Account Id
Please provide a unique identifier for your account. Once registered, your on-demand service will be available at http://admin.icasework.com/youraccountid. The identifier must be lowercase and must start with a character. No special characters other than underscores are allowed.
Your account ID

Next >>

Upon submit, you will be sent a confirmation email. Activate your account using the **Click here to activate your service** link in the email.


Thank you for registering with us. Your account id is my_hotels. You must activate your service before you can use it.
Click here to activate your service

iCasework account registration - Ref. 29932

Account details

User name	MY_HOTELS
Organisation	
Name	My Hotel Company
Address	London
Country	United Kingdom

Quick Start guide

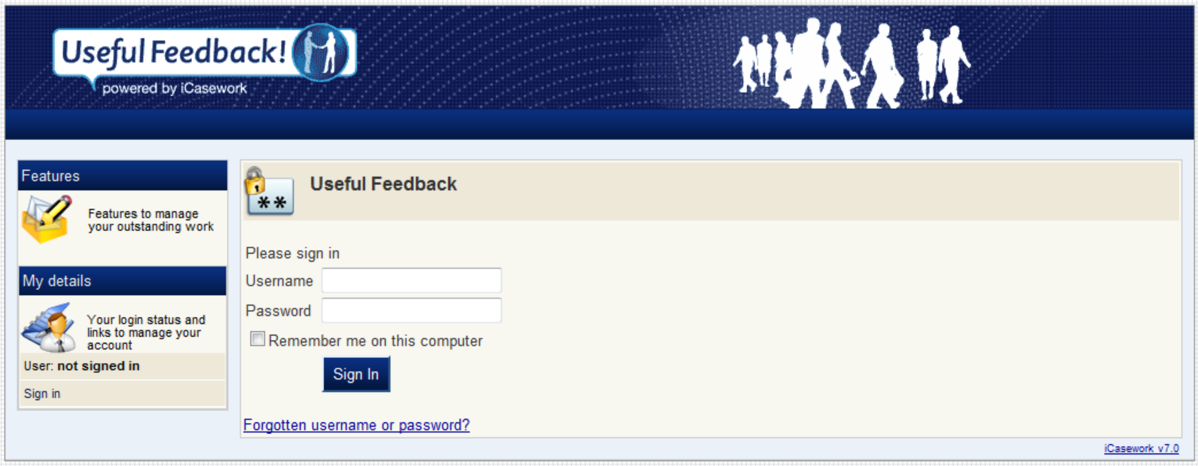
Preparing your service may take a few moments:

When your service is ready, you will be presented with a hyperlink to log in to the service.

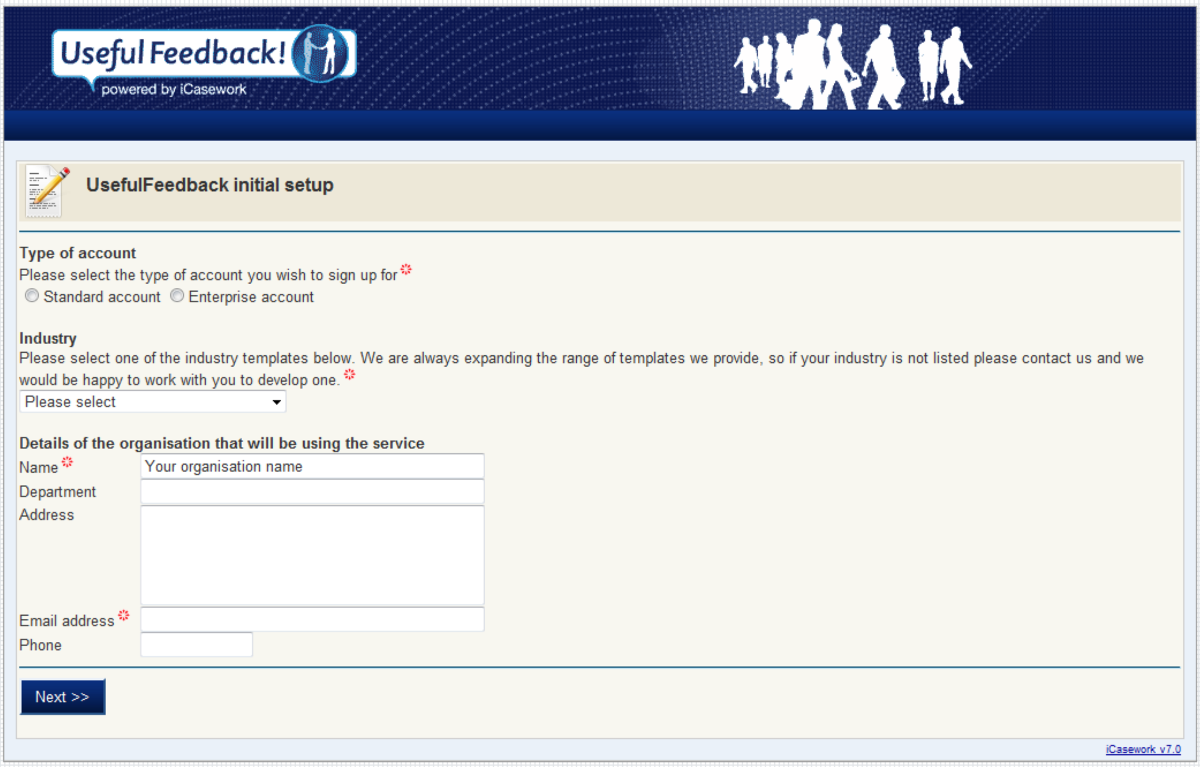
Quick Start guide

UsefulFeedback! Initial Setup

Sign in to the UsefulFeedback! service using the username and password you provided earlier. The user created during sign-up has been given Administrator privileges and will be referred to as the **Administrator** user in this document.



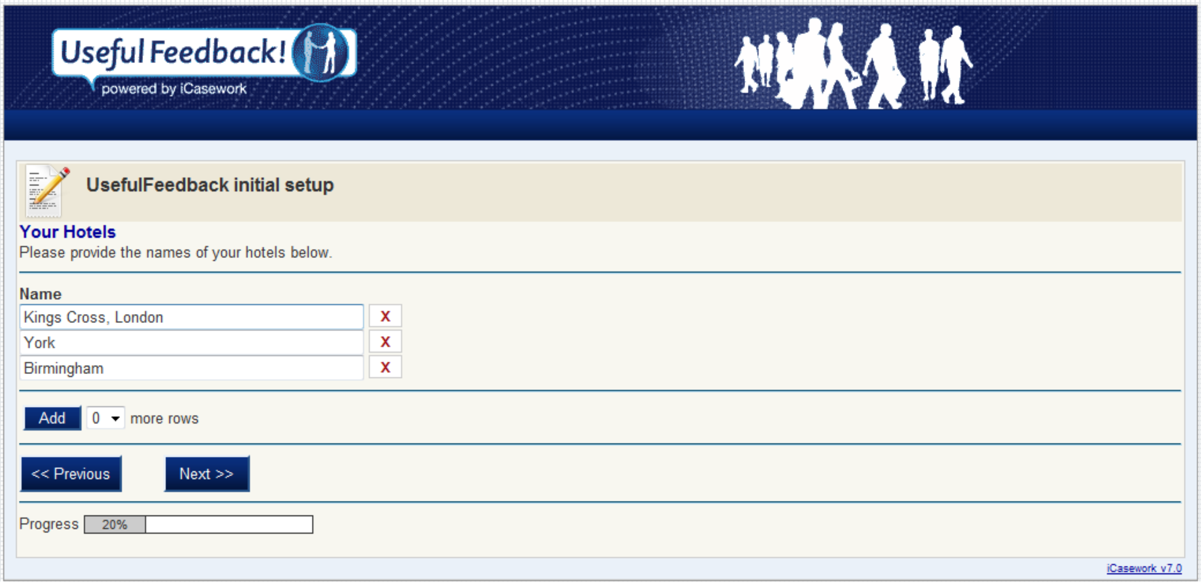
After successful login, you will be presented with a number of Initial Setup screens.



On the first set up screen choose an industry template from the extensive list available. The template chosen will determine which other details you will be prompted for. Although templates have been designed to use industry specific best practices, a vast array of preferences and settings are available for further configuration under the Administration menu.

Quick Start guide

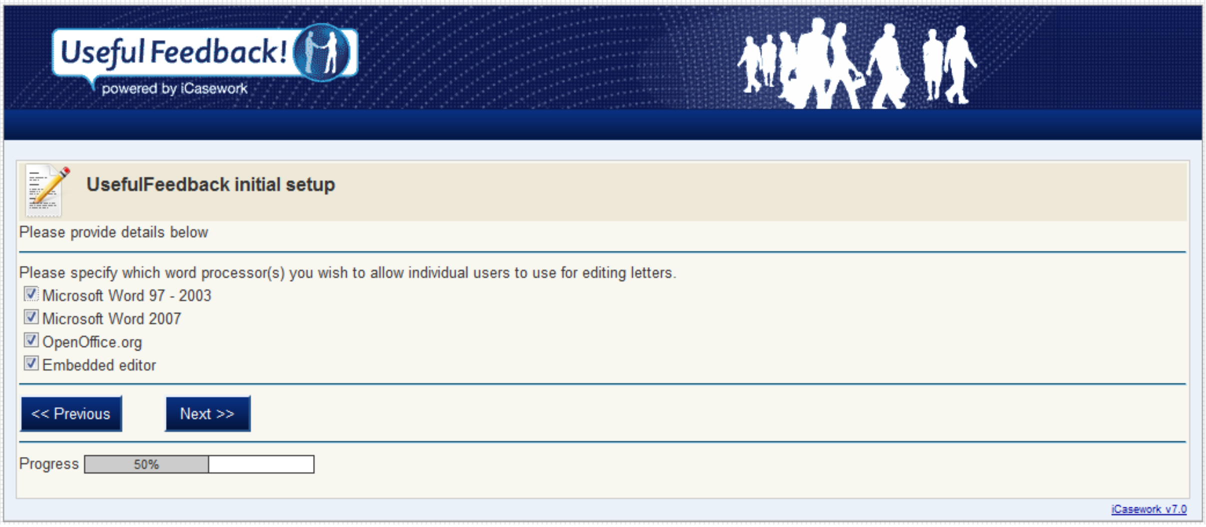
In this example we have selected "Hotels" for our industry template and we are now asked to enter hotels names:



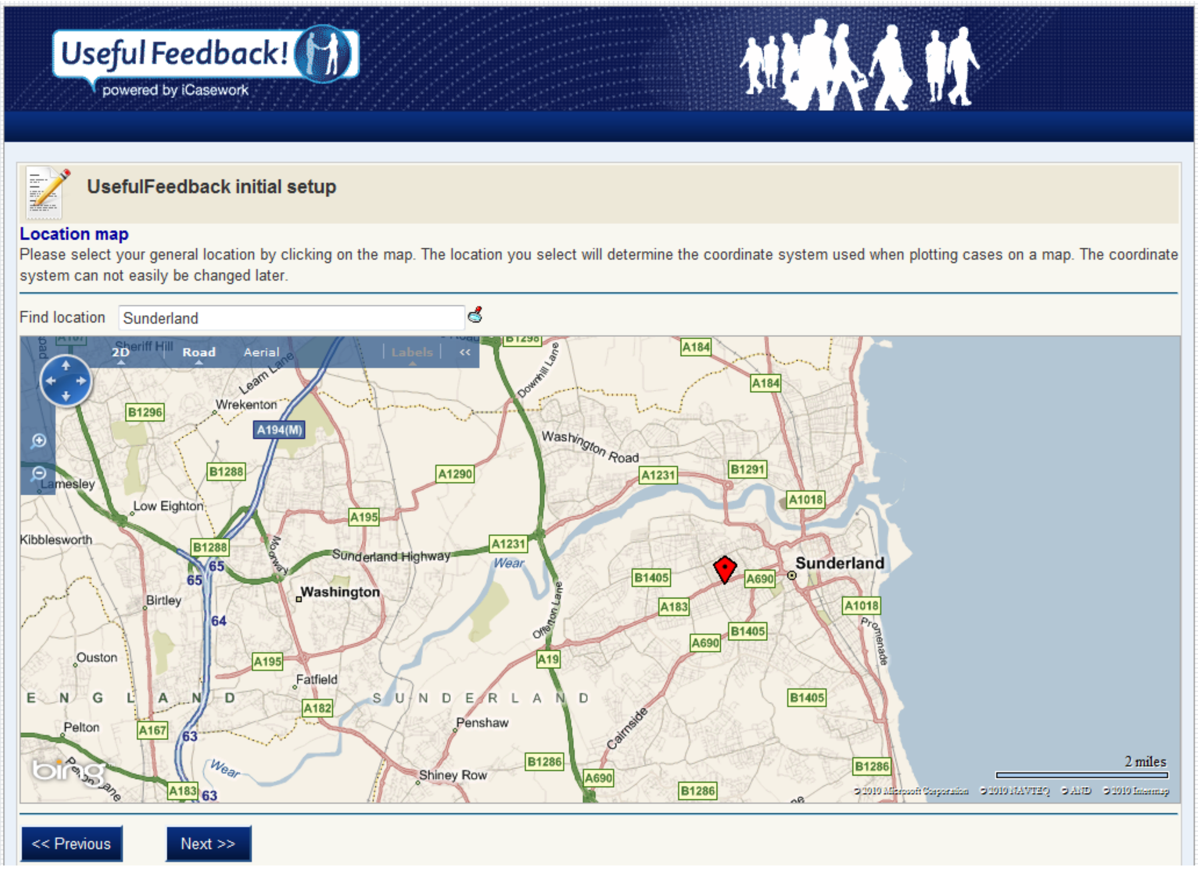
Next you will be prompted to configure various regional settings such as date format, time zone, currency symbol, working week and address preferences.

Quick Start guide

As explained, iCasework supports the use of MSWord, OpenOffice.org and an embedded editor for editing printed correspondence but you may not wish to make all of those choices available to staff using UsefulFeedback!, especially if your organisation has standardised on the use of a single type and/or version of word processor. The next setup screen allows you to choose which word processors to enable:



Next, set an approximate central point for the initialisation of maps within your system. It is important to set a location, even if you will not be plotting complaints on a map at this point.



After completing this page move on to submit the setup wizard.

Quick Start guide

Recording a case

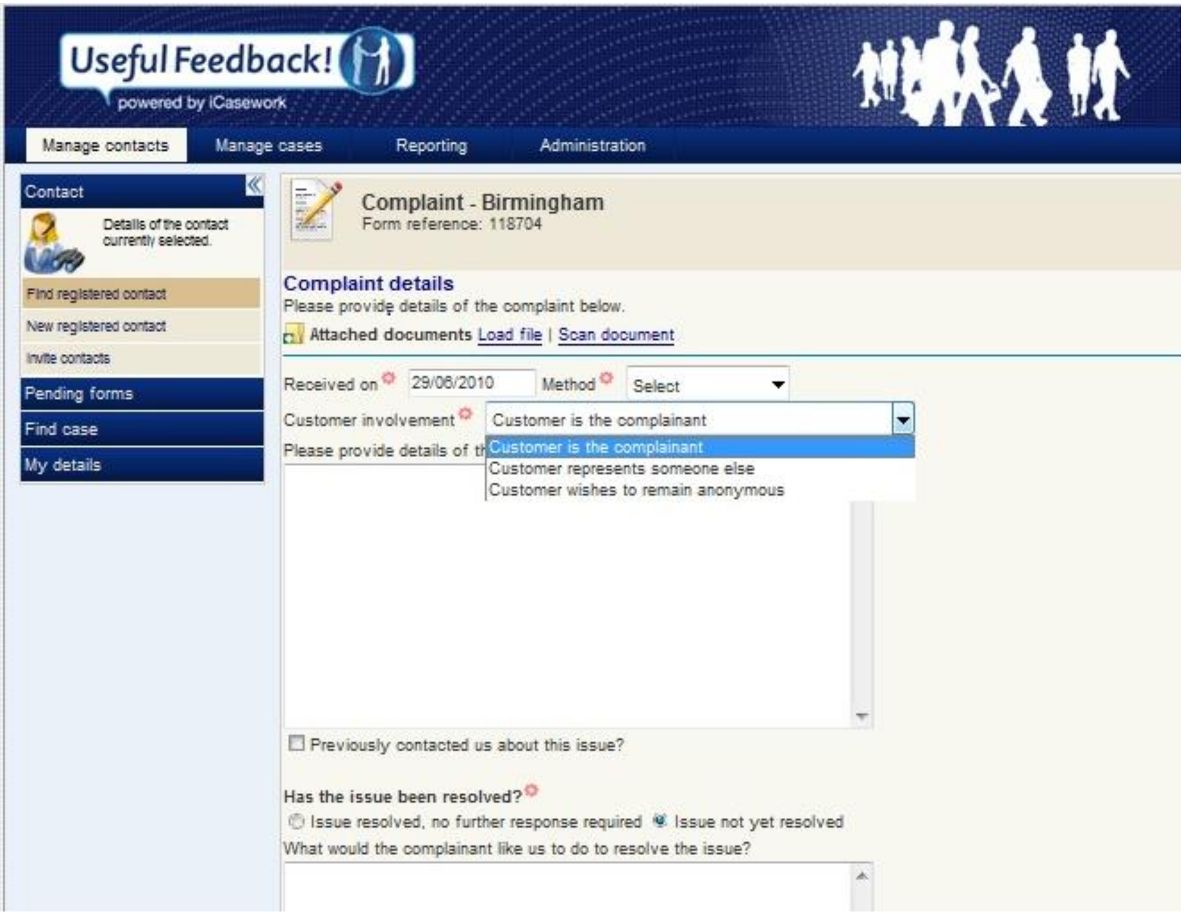
The first screen you see after completing the initial setup wizard is the Manage Contacts screen. This is the place where power users (such as the Administrator user you created during sign-up) can create cases or look at the contact history for a customer. Another, simplified version of this screen is available for front-line staff that have been set up as Basic Users rather than as Power Users.

When recording new casework, always first search for a contact to ensure you are not creating duplicate cases and/or contacts. To search for a contact, enter a name into the surname field and select Query.

Having just signed up for the service your search is however very unlikely to find any matches! So to create a case for a new contact, select **Service menu.** This will display a menu of services and feedback types for your organisation - notice that the hotels set up in the initial setup wizard appear as part of the service menu.

Quick Start guide

Select an item from the menu - in this example we are logging a complaint against the Birmingham hotel. Note that the details captured in the form can be controlled through further preferences.



On the next page enter contact details for the complainant:

Quick Start guide

The complaint has now been logged against a new contact Joe Bloggs and appears in his contact history:

Adding the Administrator user to a team

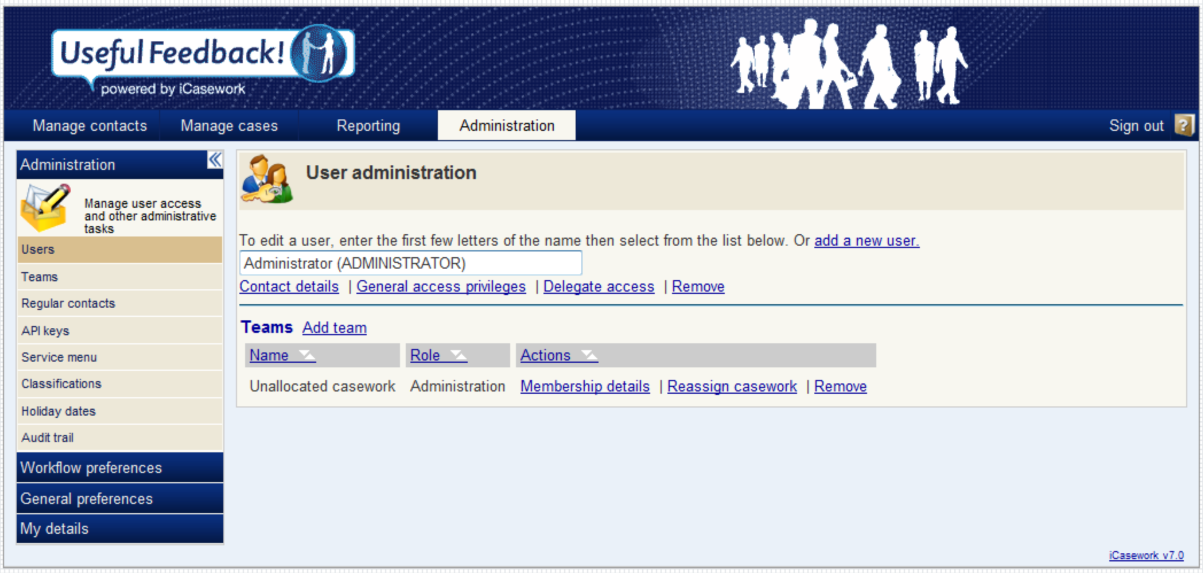
In order for the **Administrator** user you are logged in as to see the case in his list, you first need to add him to the team that manages the service area against which you assigned the complaint. For the current example, you would need to add the **Administrator** to the Birmingham team.

Teams are groups of users that can be assigned cases or related work such as tasks. Often, service areas in the service menu (i.e. entries in the service menu that have been associated with a Complaint, Compliment, Suggestion or Query) manage their own cases - in this example there is a Contact Centre team, a Website team, a Human Resources team, a Corporate affairs as well as separate teams for each of the hotels created. However, it is also possible to centralise case management and have another team manage casework on behalf of these teams.

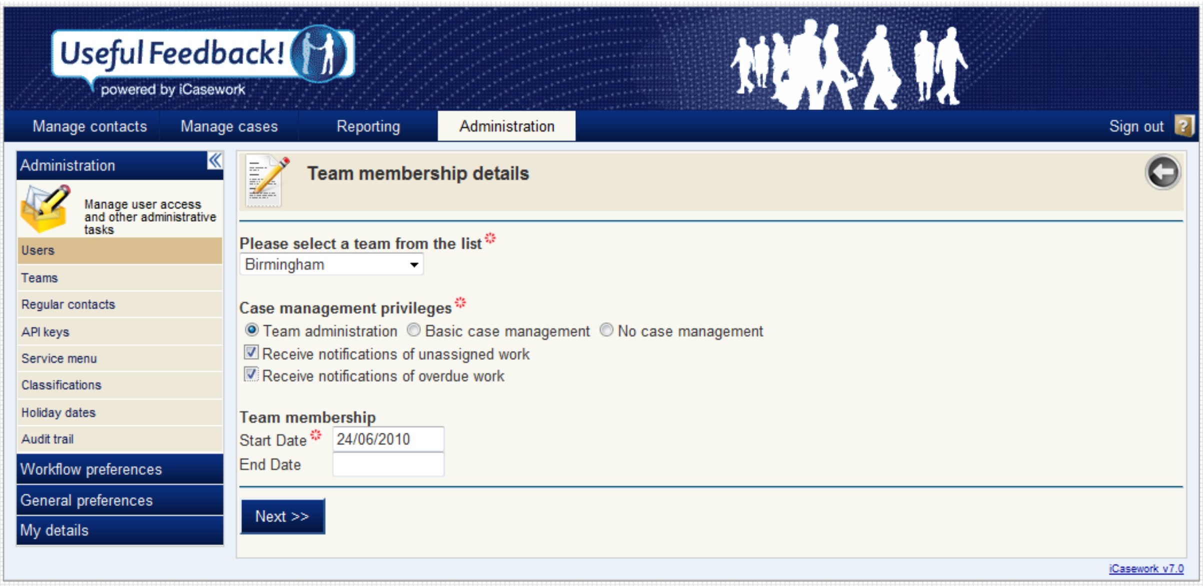
To assign the **Administrator** user to the Birmingham team, go to the Administration tab and start typing "Administrator" in the text field, then select the Administrator user from the dropdown:

Quick Start guide

The teams of which the **Administrator** user is a member are displayed:



Select **Add team,** then select the **Birmingham** team from the drop down list and set privileges as shown below:

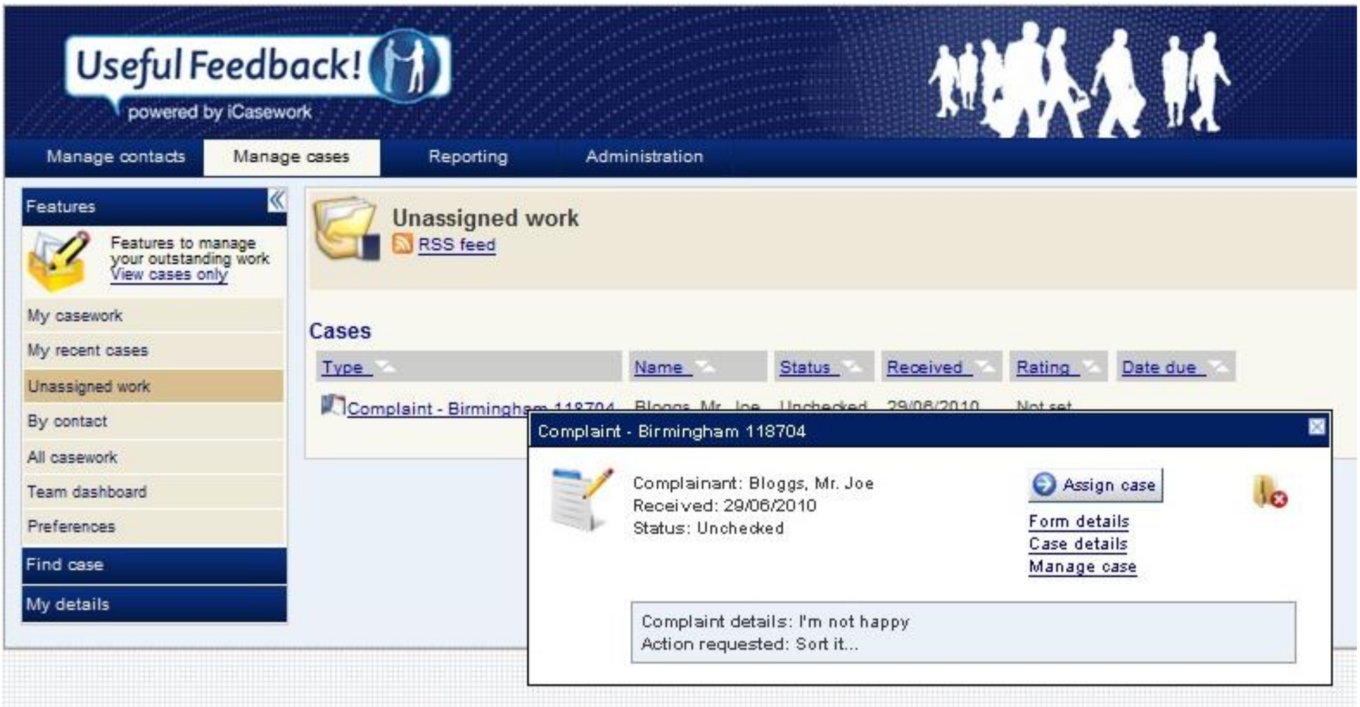


Selecting either the **Team administration** privilege or the **Basic case management** privilege will give the **Administrator** user the ability to manage cases for the team. Selecting the **Team administration** privilege would also give the **Administrator** user the ability to manage unassigned cases and to administer team privileges for other team members. Note that the **No case management** privilege would have reduced the **Administrator** users privileges for that team to dealing with tasks or recording new casework only.

Quick Start guide

Managing a case

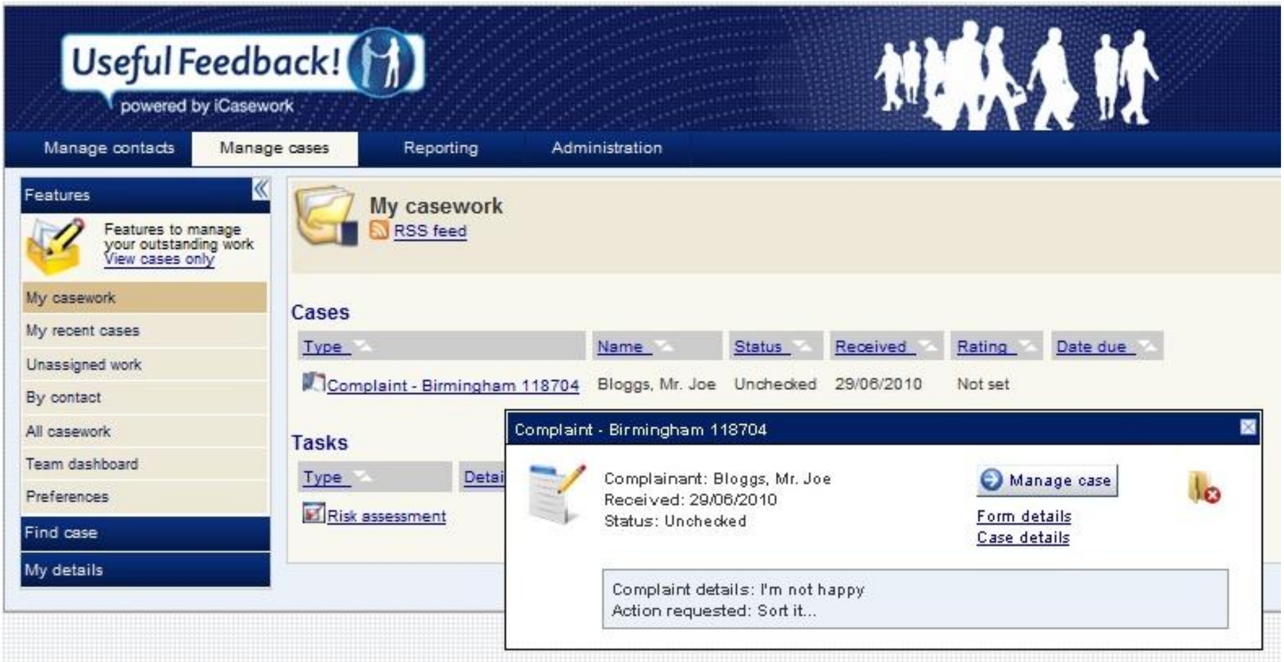
The **Manage cases** tab allows users to manage cases and related work such as tasks and correspondence. After adding the **Administrator** user to the Birmingham team, the case just created should now be listed under **Unassigned work**. To select the case click on the complaint title:



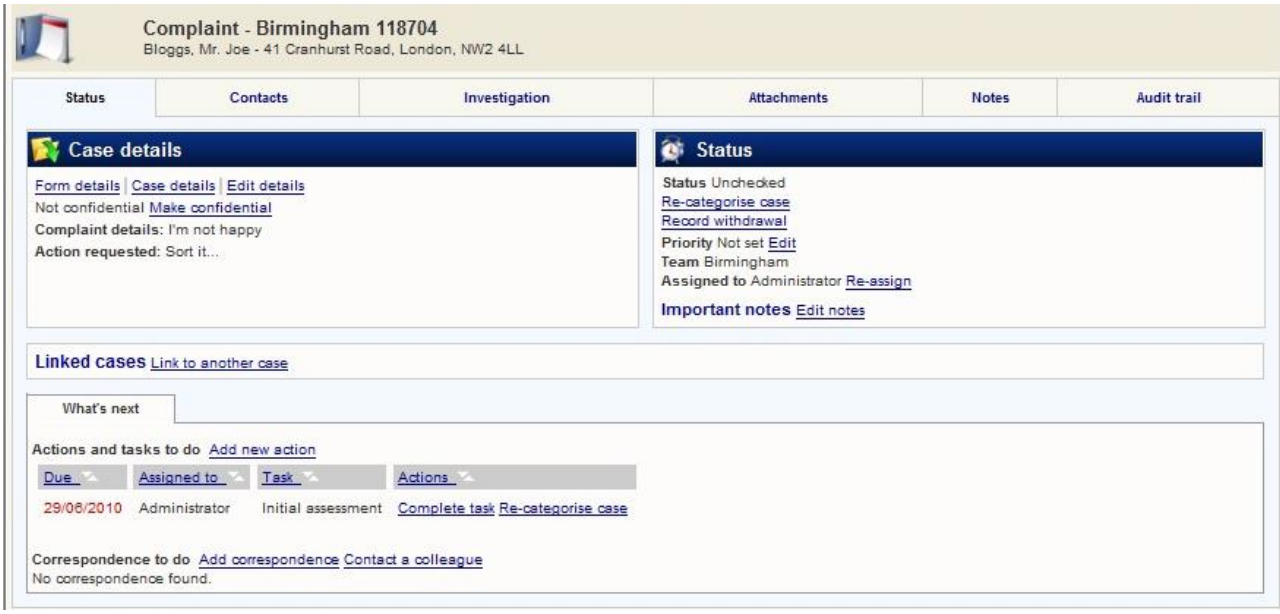
To assign the case, select **Assign case** and assign the case to the **Administrator** user.

Quick Start guide

The case should now be listed in the **My casework** area for the **Administrator** user. To access the case click on the complaint title and select **Manage case**.



The case opens in a new window (you can change this behaviour through your preferences to ensure cases open in the current window).



The key area in the Manage Case screen is the **What's next** tab. Here you will be guided through the workflow of a case - all required tasks and correspondence will automatically appear! Further ad-hoc actions are available through the **Add new action** link. The Manage Case screen has other tabs available where you can manage contacts, attachments and notes. You will find that most of these are self explanatory, but do check out the comprehensive online help for further details.