



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.



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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



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Preparing your service may take a few moments:

The screenshot shows the iCasework logo and tagline 'versatile web 2.0 case management' at the top left. To the right is a white silhouette of a group of people walking. Below the logo is a light beige box with a document icon and a green checkmark, titled 'Account activation'. At the bottom left, there is a loading spinner icon followed by the text 'Preparing your service... Please wait.'

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

The screenshot shows the same iCasework logo and tagline at the top left, and the same group silhouette on the right. The 'Account activation' box now contains a document icon with a green checkmark. Below this box, the text reads: 'Congratulations! Our service is now ready to use at <http://admin.icasework.com/demo> Sign in to the service with the username and password you provided earlier.' At the bottom, it says: 'If you have any problems, queries or suggestions please access our support portal at <http://portal.icasework.com/support>.'



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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.

The screenshot shows the login interface for Useful Feedback!. At the top, there is a header with the logo and the text 'powered by iCasework'. Below the header, there is a navigation menu with 'Features' and 'My details'. The main content area is titled 'Useful Feedback' and contains a sign-in form with fields for 'Username' and 'Password', a 'Remember me on this computer' checkbox, and a 'Sign In' button. A link for 'Forgotten username or password?' is located below the form. The footer of the page indicates 'iCasework v7.0'.

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

The screenshot shows the 'UsefulFeedback! initial setup' screen. It features a header with the logo and 'powered by iCasework'. The main content area is titled 'UsefulFeedback! initial setup' and contains several sections: 'Type of account' with radio buttons for 'Standard account' and 'Enterprise account'; 'Industry' with a dropdown menu; and 'Details of the organisation that will be using the service' with input fields for 'Name', 'Department', 'Address', 'Email address', and 'Phone'. A 'Next >>' button is located at the bottom of the form. The footer of the page indicates 'iCasework v7.0'.

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.



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

UsefulFeedback initial setup

Your Hotels
Please provide the names of your hotels below.

Name	
Kings Cross, London	X
York	X
Birmingham	X

Add 0 more rows

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Progress 20%

iCasework v7.0

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

UsefulFeedback initial setup

Please take care when providing the regional details below. Note that the date format and time zone cannot be changed once cases have been created on the system.

Date format *

European (dd/mm/yyyy) US (mm/dd/yyyy)

Time zone *

(GMT +00:00) Europe/London

Currency symbol *

Working week

Please tick the days that are NOT working days.

Mon Tue Wed Thu Fri Sat Sun

First day of the working week * Mon

Addresses

Please provide address preferences below. If required for certain countries, postcode may be prefixed with a label in the formatted address. eg. PO. BOX.

Town/City label Town

County/State/Province label County

Postcode label Postcode

Postcode prefix

Position of postcode Before the city At the end of the address

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Progress 40%



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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:

UsefulFeedback initial setup

powered by iCasework

Please provide details below

Please specify which word processor(s) you wish to allow individual users to use for editing letters.

- Microsoft Word 97 - 2003
- Microsoft Word 2007
- OpenOffice.org
- Embedded editor

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Progress

iCasework v7.0

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.

UsefulFeedback initial setup

powered by iCasework

Location map

Please select your general location by clicking on the map. The location you select will determine the coordinate system used when plotting cases on a map. The coordinate system can not easily be changed later.

Find location

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

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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.



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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.

Useful Feedback!
powered by iCasework

Manage contacts | Manage cases | Reporting | Administration

Contact
Details of the contact currently selected.

- Find registered contact
- New registered contact
- Invite contacts
- Pending forms
- Find case
- My details

Complaint - Birmingham
Form reference: 118704

Complaint details
Please provide details of the complaint below.

Attached documents [Load file](#) | [Scan document](#)

Received on: 29/06/2010 Method: Select

Customer involvement: Customer is the complainant

Please provide details of the complaint:

Previously contacted us about this issue?

Has the issue been resolved?
 Issue resolved, no further response required
 Issue not yet resolved

What would the complainant like us to do to resolve the issue?

On the next page enter contact details for the complainant:

Useful Feedback!
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Manage contacts | Manage cases | Reporting | Administration

Contact
Details of the contact currently selected.

- Find registered contact
- New registered contact
- Invite contacts
- Pending forms
- Find case
- My details

Complaint - Birmingham
Form reference: 118704

Complainant

Title: Mr.

First name: Joe

Surname: Bloggs

Postcode lookup: NW2 4LL [Click to find](#)

Address: 41 Cranhurst Road

Town: London

County:

Postcode: NW2 4LL

Email address:

Phone: Ext.:

Mobile:

Best contact method: Email Emails will be sent to the address above

How would you describe yourself?: Leisure customer



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

Contact Mr. Joe Bloggs

Record a new request

Service menu Keyword Find service

Recent contacts [View all](#)

Date	Method	Details	Status
29/06/2010	Form	Complaint - Birmingham 118704 Complaint details: I'm not happy Action requested: Sort it...	Received: 29/06/2010 Status: Unchecked Not yet assigned Assign case

Forms pending
No forms pending

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:

Administration User administration

To edit a user, enter the first few letters of the name then select from the list below. Or [add a new user](#).

ad

Administrator (ADMINISTRATOR)

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

The screenshot shows the 'User administration' page in the Useful Feedback! system. The left sidebar contains a navigation menu with options like 'Users', 'Teams', 'Regular contacts', 'API keys', 'Service menu', 'Classifications', 'Holiday dates', 'Audit trail', 'Workflow preferences', 'General preferences', and 'My details'. The main content area is titled 'User administration' and includes a search box for 'Administrator (ADMINISTRATOR)'. Below the search box, there are links for 'Contact details', 'General access privileges', 'Delegate access', and 'Remove'. A 'Teams' section is visible, showing a table with columns for 'Name', 'Role', and 'Actions'. The table lists 'Unallocated casework' and 'Administration' as teams, with links for 'Membership details', 'Reassign casework', and 'Remove' for each. The version number 'iCasework v7.0' is displayed in the bottom right corner.

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

The screenshot shows the 'Team membership details' page in the Useful Feedback! system. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Team membership details' and includes a dropdown menu for selecting a team, currently set to 'Birmingham'. Below this, there are radio buttons for 'Case management privileges': 'Team administration' (selected), 'Basic case management', and 'No case management'. There are also checkboxes for 'Receive notifications of unassigned work' and 'Receive notifications of overdue work'. A 'Team membership' section includes fields for 'Start Date' (24/06/2010) and 'End Date'. A 'Next >>' button is located at the bottom of the form. The version number 'iCasework v7.0' is displayed in the bottom right corner.

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.

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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:

The screenshot shows the 'Unassigned work' section of the Useful Feedback! interface. A modal window is open for the case 'Complaint - Birmingham 118704'. The modal displays the following information:

- Complainant:** Bloggs, Mr. Joe
- Received:** 29/06/2010
- Status:** Unchecked

Below the details, there is a text box containing:

Complaint details: I'm not happy
Action requested: Sort it...

The modal also features an 'Assign case' button and three links: 'Form details', 'Case details', and 'Manage case'.

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

The screenshot shows the 'Caseworker assignment' page for the case 'Complaint - Birmingham 118704'. The page includes a dropdown menu for selecting a caseworker. The selected option is 'Administrator (0 cases assigned)'. Below the dropdown is a 'Next >>' button.



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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 screenshot shows the 'My casework' dashboard with a sidebar menu and a main content area. A pop-up window is displayed over the 'Cases' table, showing details for 'Complaint - Birmingham 118704'. The pop-up includes a 'Manage case' button and links for 'Form details' and 'Case details'. The case details shown are: Complainant: Bloggs, Mr. Joe; Received: 29/06/2010; Status: Unchecked. The complaint details are: 'I'm not happy' and the action requested is 'Sort it...'.

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

The screenshot shows the 'Complaint - Birmingham 118704' case details page. The page is divided into several tabs: Status, Contacts, Investigation, Attachments, Notes, and Audit trail. The 'Case details' tab is active, showing 'Form details', 'Case details', and 'Edit details' links. The 'Status' tab is also visible, showing 'Status Unchecked' and various action links like 'Re-categorise case', 'Record withdrawal', and 'Re-assign'. The 'What's next' section shows a table of actions and tasks to do, with columns for Due, Assigned to, Task, and Actions. The table shows a task due on 29/06/2010 assigned to Administrator, with the task 'Initial assessment' and the action 'Complete task Re-categorise case'. The 'Correspondence to do' section shows 'Add correspondence' and 'Contact a colleague' links, with a note that 'No correspondence found'.

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.