

## New interface benefits

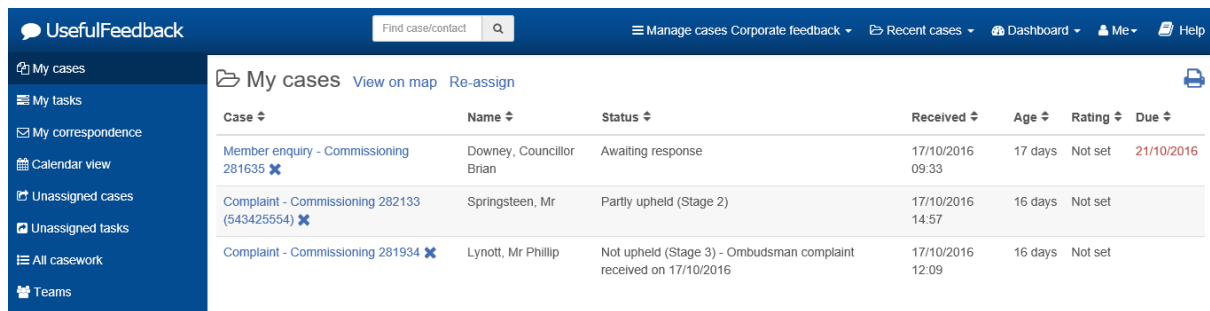
In this document we detail some of the main benefits / changes of the new interface compared to the previous one. This is to help our customers using our old interface prepare for moving over to the new interface.

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## Display

Default screen is now the manage cases screen:



| Case   | Name                     | Status  | Received         | Age     | Rating  | Due        |
|--|--------------------------|---|------------------|---------|---------|------------|
| Member enquiry - Commissioning 281635        | Downey, Councillor Brian | Awaiting response   | 17/10/2016 09:33 | 17 days | Not set | 21/10/2016 |
| Complaint - Commissioning 282133 (543425554) | Springsteen, Mr          | Partly upheld (Stage 2)   | 17/10/2016 14:57 | 16 days | Not set |            |
| Complaint - Commissioning 281934             | Lynott, Mr Phillip       | Not upheld (Stage 3) - Ombudsman complaint received on 17/10/2016 | 17/10/2016 12:09 | 16 days | Not set |            |

By selecting the hyperlink, you now go straight into the case now.

System automatically optimises to the device you are using, for e.g. here's a tablet display:

My cases [View on map](#) [Re-assign](#)

| Case   | Name                     | Status  | Due        |
|--|--------------------------|---|------------|
| Member enquiry - Commissioning 281635        | Downey, Councillor Brian | Awaiting response   | 21/10/2016 |
| Complaint - Commissioning 282133 (543425554) | Springsteen, Mr          | Partly upheld (Stage 2)   |            |
| Complaint - Commissioning 281934             | Lynott, Mr Phillip       | Not upheld (Stage 3) - Ombudsman complaint received on 17/10/2016 |            |

My cases screen is now restructured so we have What's Next and What's done on the right hand pane and the rest on the left.

Transport policy 279633  
Smith, Mr John (105101) - iCasework Ltd, 2 Kimberley Road, London, Greater London, NW675G

Status | Contacts | Documents | Request | Timeline | Audit trail

**What's next** Add note

| Due        | Type            | Recipient                       | Actions        |
|------------|-----------------|---------------------------------|----------------|
| 30/09/2016 | Acknowledgement | Smith, Mr John<br>Prefers email | Edit   Add   X |

**Tasks** Get information | To do | All actions

| Due        | Task                               | Actions                  |
|------------|------------------------------------|--------------------------|
| 17/10/2016 | Classify the information requested | Action now   Re-assign X |
| 27/10/2016 | Prepare response                   | Action now   Re-assign X |

**What's done**

| Date             | Details             |
|------------------|---------------------|
| 13/10/2016 14:34 | Initial assessment  |
| 23/09/2016 12:15 | Information request |

**Status:** Prepare response due 27/10/2016

Initial assessment  
Re-categorize case  
Withdraw case  
Due 13 days ago on 21/10/2016  
Risk Standard Edit  
Team Information Requests  
Assigned to Adam Administrator Re-assign

**Details**

Received about a month ago on 23/09/2016  
Form details | Case details | Edit details

Not confidential Make confidential

Scheme: Freedom of Information Act  
Details: I'm not happy

Email from mohamed.patel@icasework.com received on 23/09/2016  
Email (original message) from mohamed.patel@icasework.com received on 23/09/2016

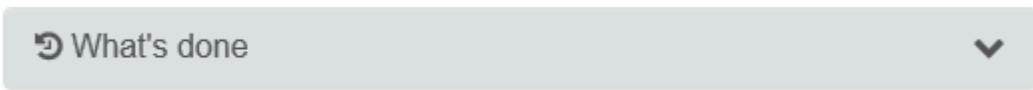
**General notes**

Enter general notes here

**Linked cases** [Link to case](#) | [Similar cases](#) | [Find case](#)

283537 Pollution | Some information sent but part exempt (closed)  
277436 Transport budget spending 2015-16 | Prepare response due 20/09/2016

You can hide sections you don't want to see by selecting the section name or the



UsefulFeedback  Manage cases Corporate feedback Recent cases Dashboard Me

My cases  
My tasks  
My correspondence  
Calendar view  
Unassigned cases  
Unassigned tasks  
All casework  
Teams

Complaint - Commissioning 282133 Reference 543425554  
Springsteen, Mr (102201) - East Sussex County Council, Transport & Environment County Hall, St. Annes Crescent, Lewes, East Sussex, BN7 1UE

Status | Contacts | Documents | Classifications | Stage 1 | Stage 2 | Timeline | Audit trail

[What's next](#) | Add note

**Correspondence** [Add](#) | [Contact a colleague](#)

| Due        | Type  | Recipient                       | Actions  |
|------------|---|---------------------------------|--|
| 18/10/2016 | Stage 2 acknowledgement - Awaiting approval | Springsteen, Mr<br>Prefers post | <a href="#">Edit</a> <a href="#">Print</a> <a href="#">Close</a> |

**Tasks** [Get comments](#) | [Contact customer](#) | [To do](#) | [All actions](#)

[What's done](#)

**Status:** Partly upheld (Stage 2)

**Details**

**Received** 16 days ago on 17/10/2016  
[Form details](#) | [Case details](#) | [Edit details](#)

Not confidential [Make confidential](#)

*Cones left in the road blocking my drive, I was told I would receive a visit on Friday but the surveyor did not turn up. And something more....*

**General notes**

**Linked cases** [Link to case](#) | [Similar cases](#) | [Find case](#)

This is a display from a smartphone of the case screen:

iCasework
☰

Transport policy 279633

Status

[Contacts](#)
[Documents](#)
[Request](#)
[Timeline](#)
[Audit trail](#)

🕒 What's next [Add note](#)

[Correspondence](#) [Add](#) | [Contact a colleague](#)

| Due          | Type            | Recipient                       | Actions  |
|--------------|-----------------|---------------------------------|--|
| 🕒 30/09/2016 | Acknowledgement | Smith, Mr John<br>Prefers email | <a href="#">Edit</a> <a href="#">📅</a> <a href="#">✕</a> |

[Tasks](#) [Get information](#) | [To do](#) | [All actions](#)

| Due          | Task                               | Actions  |
|--------------|------------------------------------|--|
| 🕒 17/10/2016 | Classify the information requested | <a href="#">Action now</a>   <a href="#">Re-assign</a> ✕ |
| 🕒 27/10/2016 | Prepare response                   | <a href="#">Action now</a>   <a href="#">Re-assign</a> ✕ |

🕒 What's done

| Date               | Details                             |
|--------------------|-------------------------------------|
| 📅 13/10/2016 14:34 | <a href="#">Initial assessment</a>  |
| 📅 23/09/2016 12:15 | <a href="#">Information request</a> |

🔍 Details

Received about a month ago on 23/09/2016  
[Form details](#) | [Case details](#) | [Edit details](#) ▼

Not confidential [Make confidential](#)

**Scheme**  
Freedom of Information Act

**Details**  
I'm not happy

[Email from mohamed.patel@icasework.com received on 23/09/2016](#)

[Email \(original message\) from mohamed.patel@icasework.com received on 23/09/2016](#)

📄 General notes

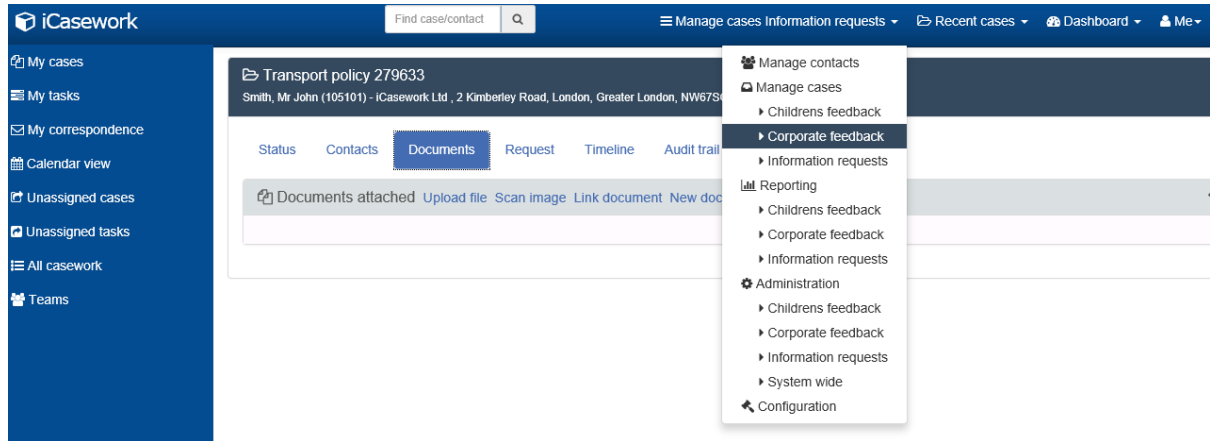
Enter general notes here

🔗 Linked cases [Link to case](#) | [Similar cases](#) | [Find case](#)

[283537](#) Pollution | Some information sent but part exempt (closed)

[277436](#) Transport budget spending 2015-16 | Prepare response due 20/09/2016

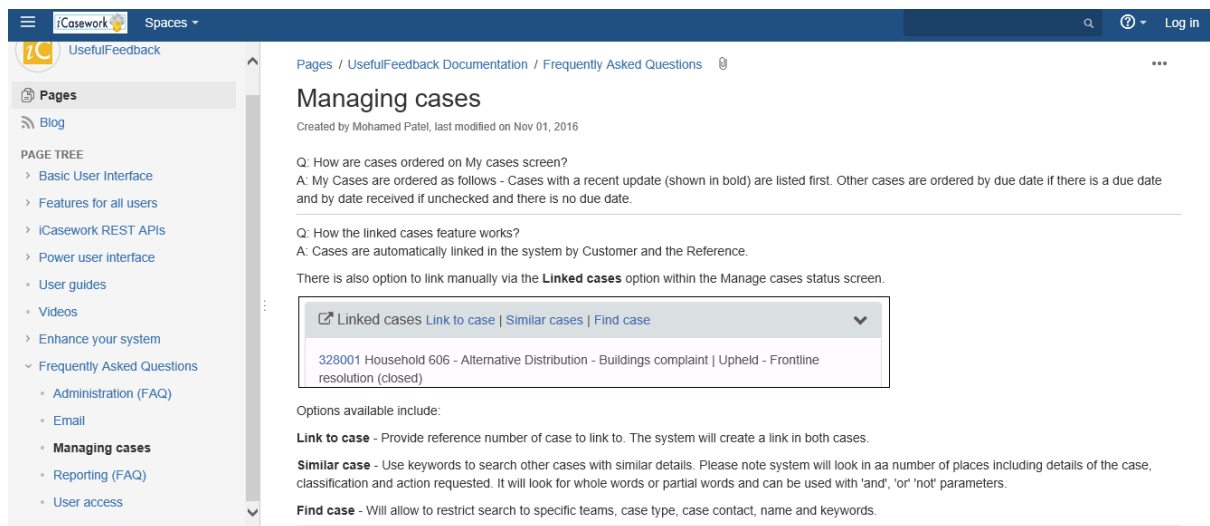
Tabs to access different parts of the system are now incorporated in the dropdown:



The navigation bar includes access to Recent cases and Help wiki is easier to see:



The Wiki will also include a newly developed FAQ section:



The **Me** option now incorporates Preferences, version number and the labels are much clearer:

Recent cases ▾ Me ▾

- My profile
- Preferences
- Change password
- Act for a colleague
- Delegate access
- Contact a colleague
- My activity log

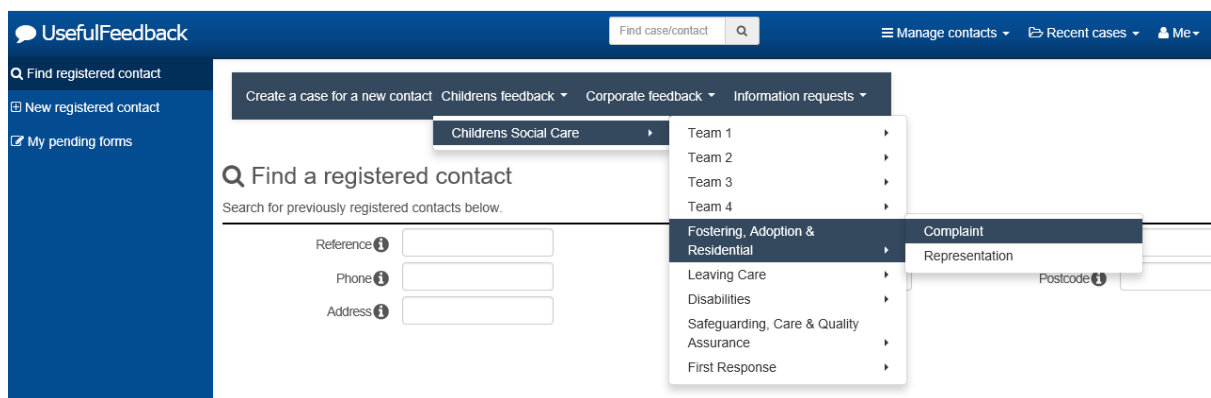
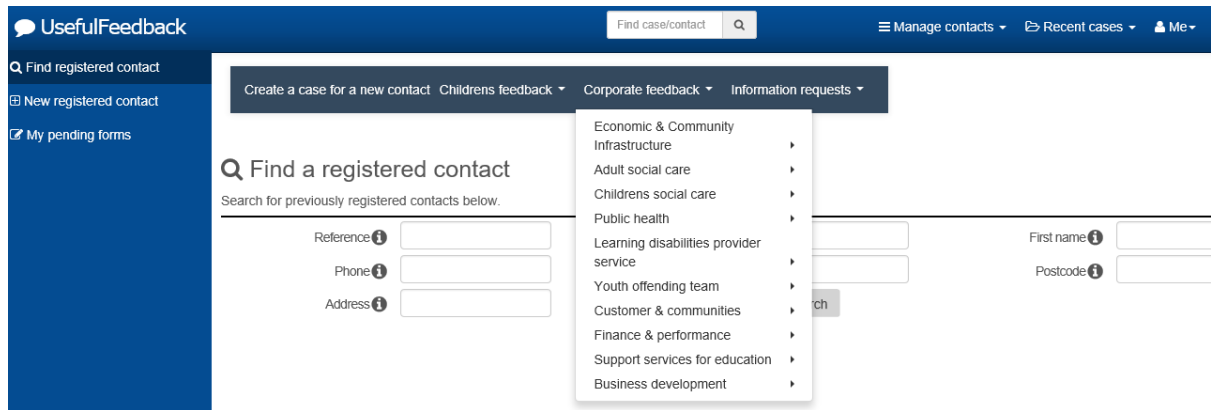
Sign out

iCasework v7.14

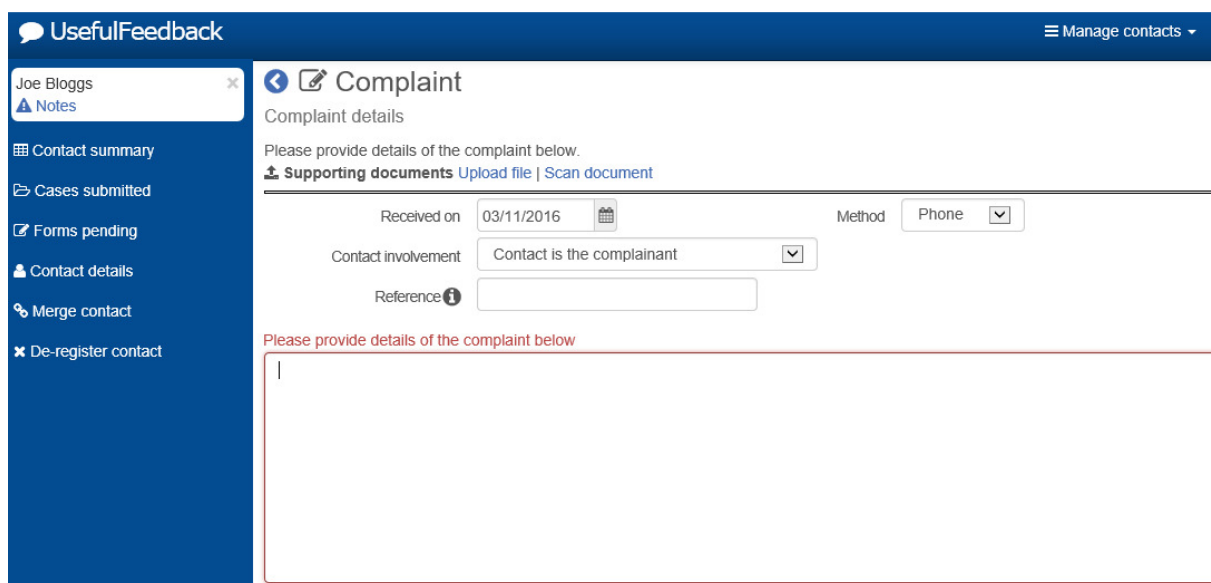
# Functionality

## Logging

When logging a new case, it's much easier to navigate to the right authority and find department / division / case type etc.



Mandatory fields are now displayed with a red wording and border:



## Managing cases

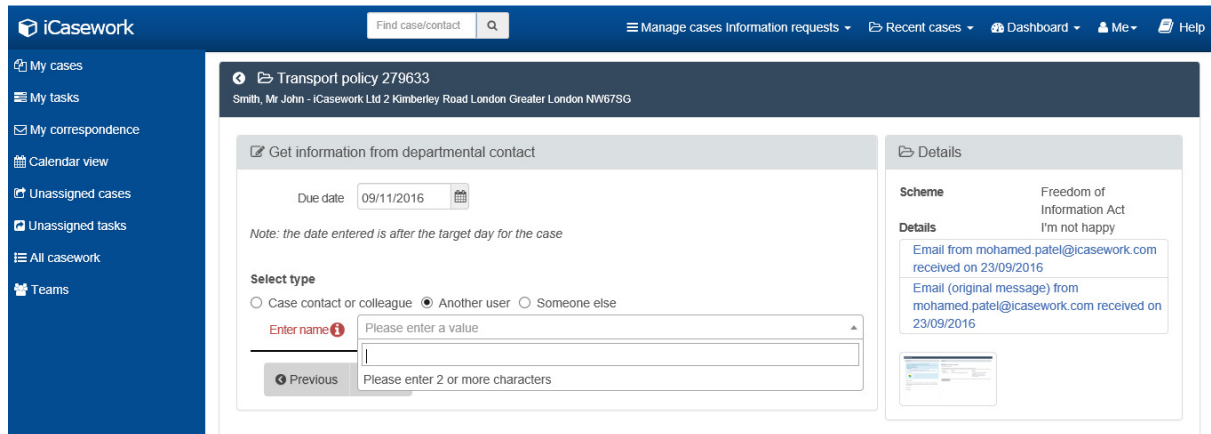
You can now recategorise a case from one authority to another:


### ← Re-categorize case

To re-categorize the case, please select a service from the menu below



When getting comments, you now have information displayed to help when finding registered emails.

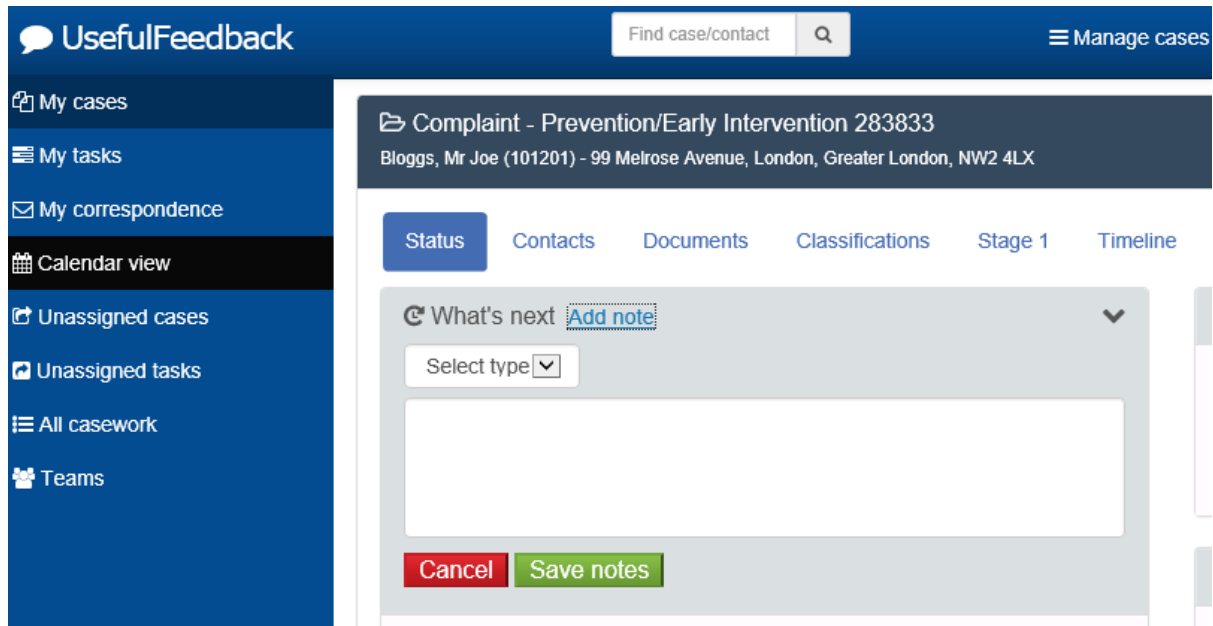


You can now reply to an email or forward using the icons [   ] displayed :

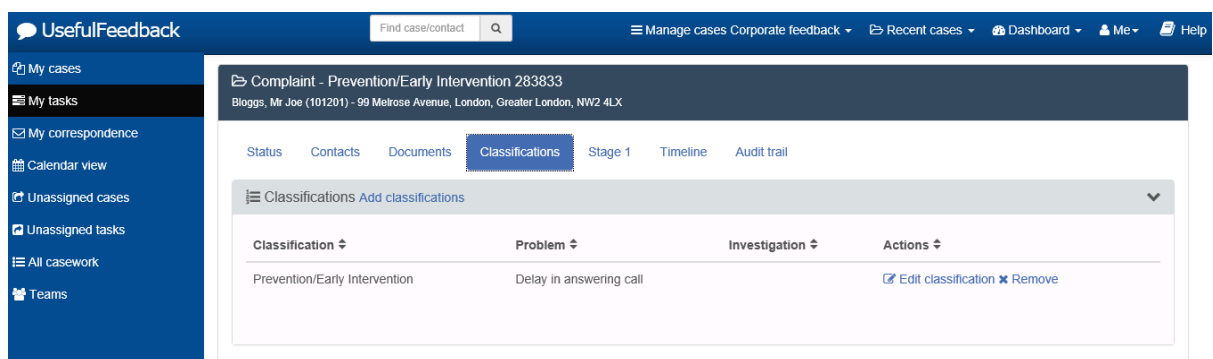




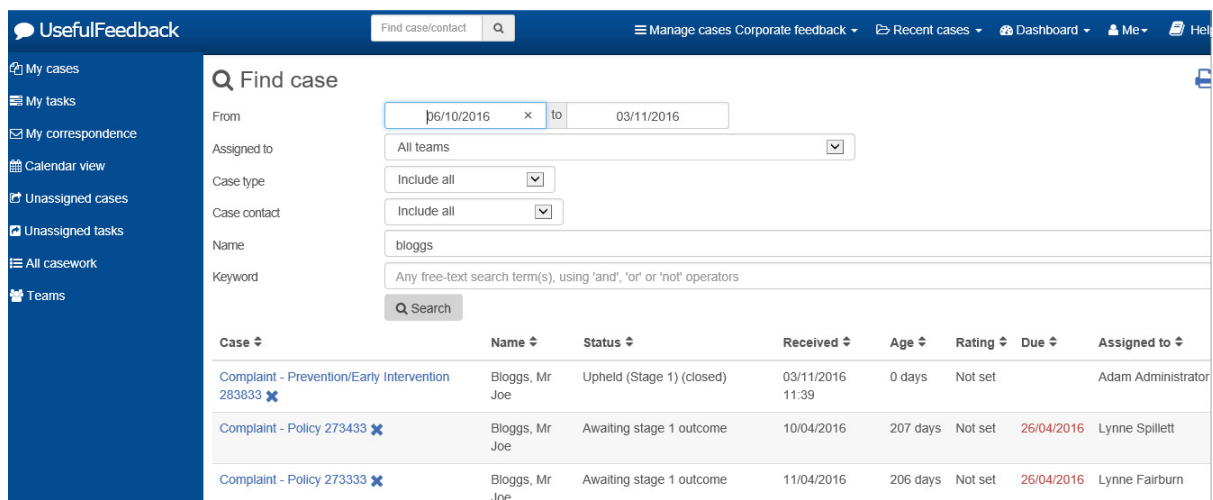
Easy to add Notes from the What's next area:



You now have a Classifications tab to allow editing and adding additional details to classification.



Find case is now incorporated into the navigation bar and is easier to use:



It will also in keyword the use of 'and', 'or' and 'not' operators. This will search case details, classification and case notes.

## Reporting

The reporting screen is now organised and much easier to navigate:

| Name                                      | Periodicity | Subscribers | Actions                                     |
|---|-------------|-------------|---|
| Case performance                          | Monthly     | None        | Run report Remove favourite Subscribe users |
| Complaint classifications - Top 10 issues | Monthly     | None        | Run report Remove favourite Subscribe users |

Case type selection is now checkboxes:

Please select one or more case types from the list below

None selected ▾

- Complaint
- Compliment
- Enquiry
- Improvement project
- Member enquiry
- Social media comment
- Suggestion
- Unallocated email

Filter data now automatically exclude Withdrawn and rejected cases:

**Filter data returned**

By period: Month to date ▾ Number: 12

By directorate: Include all ▾

By team: Include all ▾

By keyword:

Exclude withdrawn cases:  Yes  No

Exclude rejected cases:  Yes  No

By attribute (1): Do not filter ▾

By attribute (2): Do not filter ▾

By attribute (3): Do not filter ▾

You now have more control on what to include in your table. Details of what to include / exclude from a table is now in the user control:

**Detail table**

Show heat colours

Hide row totals  Yes  No

Hide row average  Yes  No

Hide row percentage  Yes  No

Row order  Alphabetical  Largest totals first

Display detail table  Always  Optionally through a button

Hide column totals  Yes  No

Hide column average  Yes  No

Hide column percentage  Yes  No

Subscribing allows you to add registered users by typing in their first or surname to search the database. By limiting subscribing to registered users it will make it easier for you to ensure that reports are no longer sent out to users that have left the organisation.



UsefulFeedback Reporting Corporate feedback Team dashboard

Report output is currently not restricted. [Edit report filter](#)

Subscribe users to chart

Subscribe users

Please provide one or more email addresses below, separated by commas

|

**Ross, Jennie**  
jmross@somerset.gov.uk, Childrens Social Care