Confirmit Action Management User Guide

Confirmit v23

This is document revision 1 of the Confirmit v23 Action Management User Guide, published in November 2017. The information herein describes Confirmit Action Management and its features as of Confirmit Horizons Build nr. 23.0.50 (given in the Authoring **Home > Help > About** box). New features may be introduced into the product after this revision and build. Go to www.confirmit.com or check “News” on the Customer Extranet for the latest updates.

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What's New in this Revision?

The following changes have been made in revision 1 of the Confirmit v23 Action Management User Guide:

- Added description of how to invoke triggers from past date - new topic (see Setting a starting date in the past for an active trigger on page 35 for more information).
- Added description of the Pre and/or Post Overdue Reminders (see How to Create a New Workflow on page 16 for more information).

Note: The general layout and language in this document is continually being corrected, adjusted and improved to ensure the user has the best possible source of information. Only NEW information and details of functionality that has changed since the previous issue are listed here - minor corrections to the text and document layout are not listed.

Important
We need your feedback so we can improve this document and provide you with the information you require. If you have any comments or constructive criticism concerning the content or layout of this documentation, please send an email to documentation@confirmit.com. Please include in your email the section number and/or heading text of the section to which your comment applies.

1. What Is Action Management?

Confirmit Action Management™ is an add-on system for initiating, coordinating and accelerating organization-wide action response to survey feedback. Action Management may also be used to help coordinate the actions of team members on items unrelated to survey response issues.

Important
This functionality is only available for SaaS customers.

An Action Management Case is triggered by the respondent's answers to the survey questions. The case is created and assigned to a named user of the system, and the person assigned follows up on the case according to the company's processes. Other users can watch and monitor the progress of the case, and cases can be assigned a due date to enforce prompt resolution of issues. Emails can be sent to advise a manager when cases become overdue.

1.1. Before You Start...

There are a number of basic things you must ensure you have in place before you start creating your Action Management program:

1. You must have access to a hub.

   The Action Management functionality is based on SmartHub™. You must therefore have access to a hub before you can set up and use Action Management. In the event you open the Action Management page and you do not have access to a hub, then the page will be empty and you will not be able to do anything. In this case you must return to your Horizons Home page and then go to the Hub Designer page to create a hub - refer to the Confirmit SmartHub User Guide for further information. Note that all settings for an Action Management program apply to the entire hub, so you can only have one program per hub.

2. You must have an End User list.

   The people (the end users, managers etc.) are defined by the End User List (EUL) (see Attribute Lists on page 6 for more information) and the roles they are assigned. All users of Action Management must be included in the EUL. They are assigned to various roles based on their job function and the type of case, and they are also assigned permissions in the AM program.

   Please make sure that your End User list has been created and has users in it (refer to the Horizons Authoring User Guide for details). You also must make sure that the list has been associated with the hub you are working with (see Associating an End User List with a Hub on page 4 for more information).

1.2. Planning the Setup

Creating an Action Management program requires a good deal of forethought before you get started, so you should discuss your plans with key stakeholders within your organization. While there is nothing preventing you from making changes after your program is set up, you may well have users who will need to be re-trained after you make any changes. To prevent complications later, you must make sure you have defined some basic aspects of your program before you get started.

1. Roles (see Roles on page 6 for more information)

   The first thing you will need to think about is, who will be assigned cases, and how will they be grouped? Perhaps some people will be responsible for owning cases and resolving them, while others will oversee or just be informed of the progress of cases. When you create workflows you will be able to define what each role is allowed to do with cases.

   It is important to note that you are restricted to naming only five different roles. However each role can have different permissions with different workflows, so you are not restricted to only five different sets of permissions.

2. Attributes (see Attribute Lists on page 6 for more information)

   Once your users are assigned to cases, they will be responsible for marking cases appropriately as they resolve them. You will need to define every possible value you would like your users to be able to select while they are working on a case. You can then restrict which values they have access to within workflows.

3. Workflows (see Workflows on page 14 for more information)

Once you have defined your roles and case attributes, you must decide how your users will interact with cases. This includes what attributes you want them to be able to use for each workflow, what roles should be available for each workflow, etc. You will also need to consider what conditions you would like to be met before certain actions can be taken (for example you might want to ensure that cases cannot be closed until they have been categorized.)

Essentially, your workflows do two things: they define what initial attributes the case has when it is first created, and they define what your users can do with the case once they have been assigned.

4. Permissions (see End User Permissions on page 36 for more information)

   While you as a Professional user have access to all cases, you will also need to consider which of your end users should have other administrative permissions above and beyond what their workflows dictate. You will need to decide who can access Action Management, who is to be able to view and edit cases they are not assigned to, who can create cases from within reporting, etc.

5. Data Fields (see Data Field Labels on page 12 for more information)

   What information about a customer is important to your users? What do the users need to know before they can get started working on a case? There are some obvious details, such as the customer's name, phone number, email address etc., but there might be some other key information that you want to make readily available for your users. While they can open a case and bring up the entire survey response that case is based on, this is labor-intensive and it doesn’t provide ready information that might be useful. So you will need to plan out what information you want to display on the Case List page and the Manage Case page that will make your users' lives easier.

6. Email Templates (see Email Templates on page 12 for more information)

   Emails will be sent automatically to specified users when a case is created or changed. The layout and content of these emails are defined by templates, which must be set up beforehand to ensure that the emails your users receive provide enough information and meet your organization’s standards for internal communications.

7. Triggering Conditions (see Filters on page 21 for more information)

   You will need to plan out what circumstances are appropriate to trigger a case. Do you have a question in your survey that asks if a respondent wishes to be contacted? Do you want to open a case every time a respondent indicates a low satisfaction score? Just an overall satisfaction score, or on any question? These are things you need to take into account before you start your Action Management program.

8. Who will be assigned? (see Triggers on page 29 for more information)

   Once you have set up workflows, you will need to consider how the system will determine which users are to be assigned to which roles when a case is created. Some organizations prefer to have a single user account, and empower that user to view the case (and associated survey response), determine who the appropriate user is, and assign the case to them manually. Other organizations may prefer to use conditional logic to trigger cases based on information in the survey response, so the system can assign the appropriate user logically at the time of case creation.

9. Language Localization (see Language Localization on page 38 for more information)

   The Action Management user interface can be displayed in any language. You can provide a translation for any language and upload it to Action Management. When the user logs in, Action Management will be displayed in the language that is specified for the user in the End User List if that language is available.

2. The Action Management Hub Overview Page

1. In the Horizons Home page Quick Reference toolbar, click the **Action Management** item.

   The Action Management > Hubs page opens.

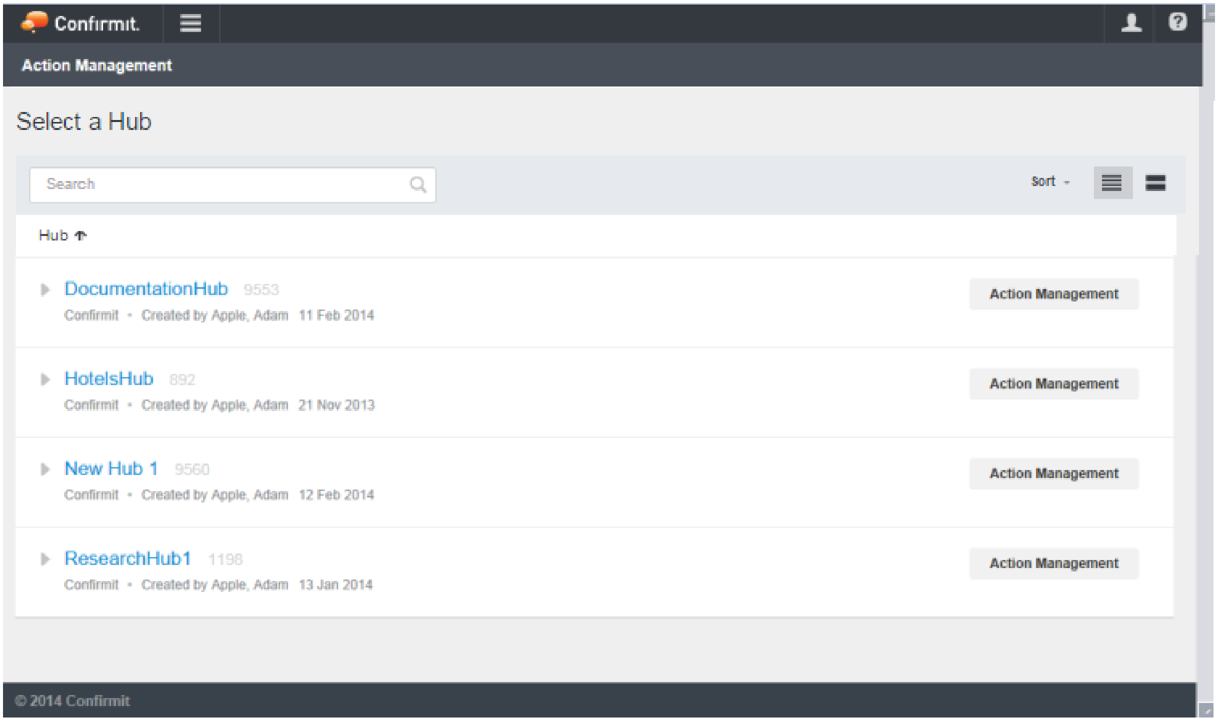


Figure 1 Example of the Action Management Hubs page

This page lists the hubs available to you. In the event the list is extensive, the list will be extended as you scroll down.

Note: The vast majority of users will only see one Hub here - it is not very common for one user to need access to multiple hubs. If you only have one hub, you will see this page only once, when you start your AM program. After you select your End User List, keep in mind that this list is the only list you will be able to use for this Hub.

2. To open the case list for a hub, click the **Action Management** icon for the required hub.

Note: The hub you select must have an associated end user list. If it does not, you will be asked to go to Confirmit Authoring and create one. The end user list determines the users available for case assignment and case management. Once an end user is associated with an Action Management program the list may not be changed.

The tools and actions available on this page are:

- The **Navigation** icon - opens a list of links to other Confirmit functionality.
- The **User** icon - shows the logged in user, and allows that user to log out.
- The search field - in the event the list of hubs is extensive, write a text string into this field; the list will be filtered in real time to show only those hubs with names containing the string.
- The **Expand item** icon - (beside each hub name) shows additional information about the specific hub - click again to toggle the information off.
- **Sort by ...** - enables you to sort the list of hubs. In the event you have access to a large number of hubs you can click the button to open a list of sort methods.
- The **Collapse** icon - hides the additional information displayed by the Expand icon.

- The **Expand** icon - shows the additional information on all the hubs in the list.

2.1. Associating an End User List with a Hub

The users available for case assignment and case management are determined by an end user list. Before you can get started in Action Management therefore, an end user list must be associated with the hub you are working in. You create an end user list in Authoring (refer to the Horizons Authoring User Guide for details). Remember to include the Hub Id for the hub you are working in, in the SmartHub Id field in the user list's General tab.

Important
Note that once an end user list is associated with an Action Management program, the list may not be changed.

The first time you click the **Action Management** button for a hub you will be asked to select the Action Management end user list that is to be used. End user lists that are linked to your Hub will be selectable, while those that are not will be grayed out.

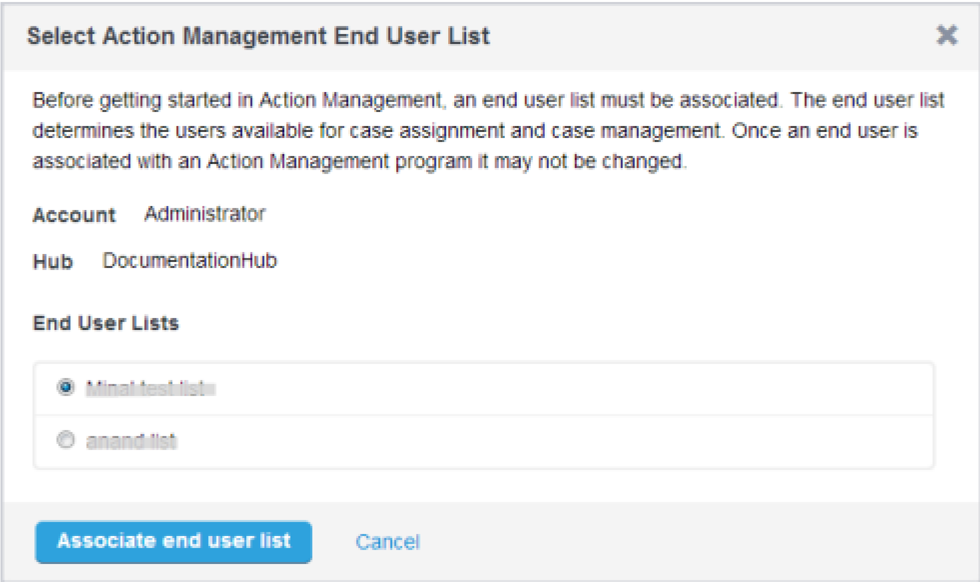


Figure 2 Selecting the End User list

1. Select the list you wish to use, then click **Associate end user list**.

   The Cases page opens.

Once an End User list is associated with a hub, when you click on the **Action Management** button you will go directly to the Cases page.

3. The Setup Menu

Click **Setup** in the Action Management toolbar to open the Case Management Setup page. This page lists all the items you need to set up an action management system, in the order in which you need to think about them.

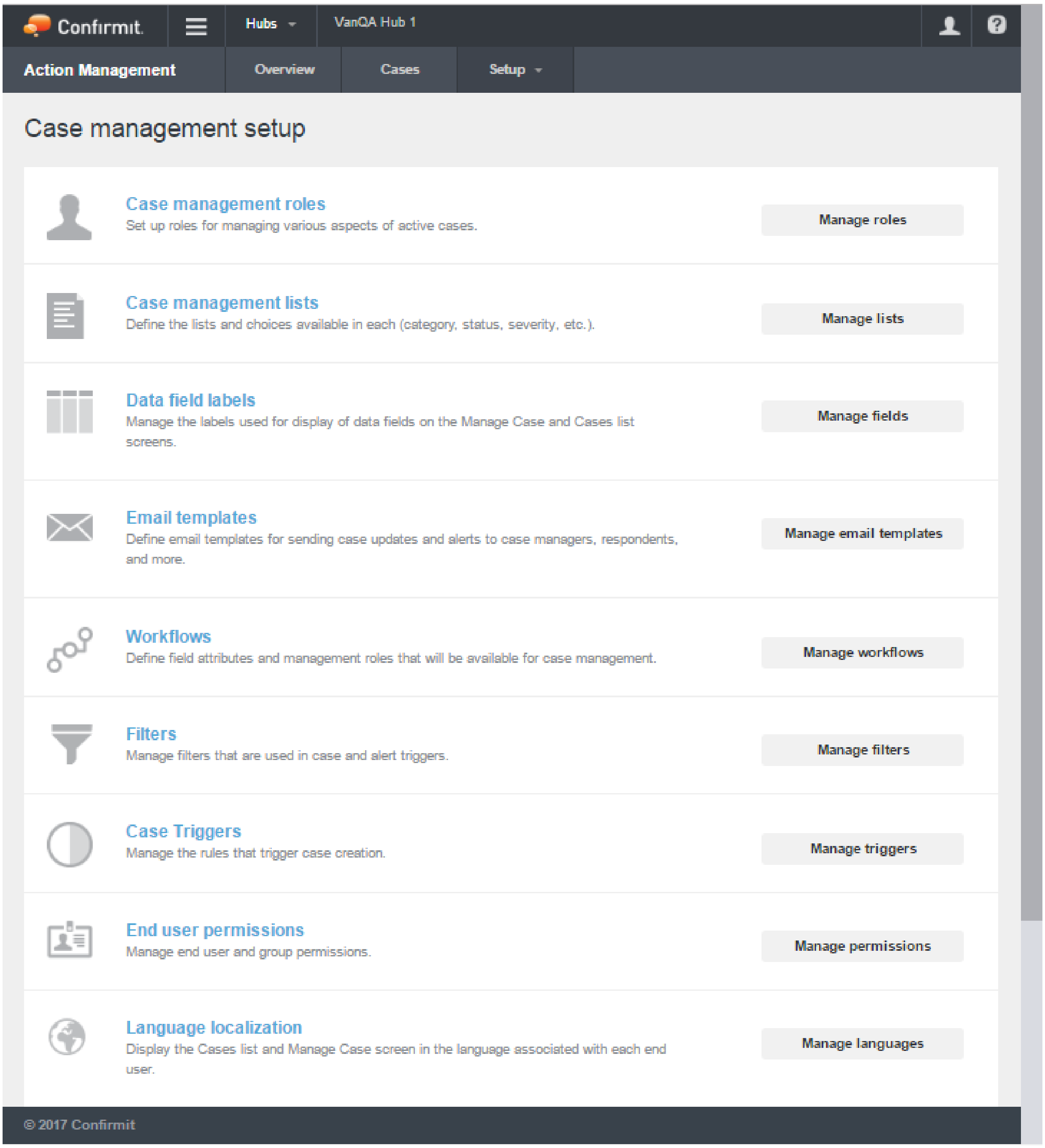


Figure 3 Example of the Case Management Setup page

Click on a blue action link or the corresponding button towards the right side of the page, or go to the **Setup** drop-down and select the desired action, to open the appropriate setup page.

3.1. Roles

“Roles” are different sets of responsibilities your users can have concerning the resolution of issues. Creating different roles allows you to segregate the responsibilities and permissions each user can have. You can create up to five different roles for managing various aspects of active cases. Note that you can allow the same roles to have different permissions and groups by using multiple workflows.

1. Go to the **Setup > Roles** menu item.

   The Case Management Roles page opens. Two roles are predefined by default; Case Manager and Watcher. You can add up to three more to a total of five.

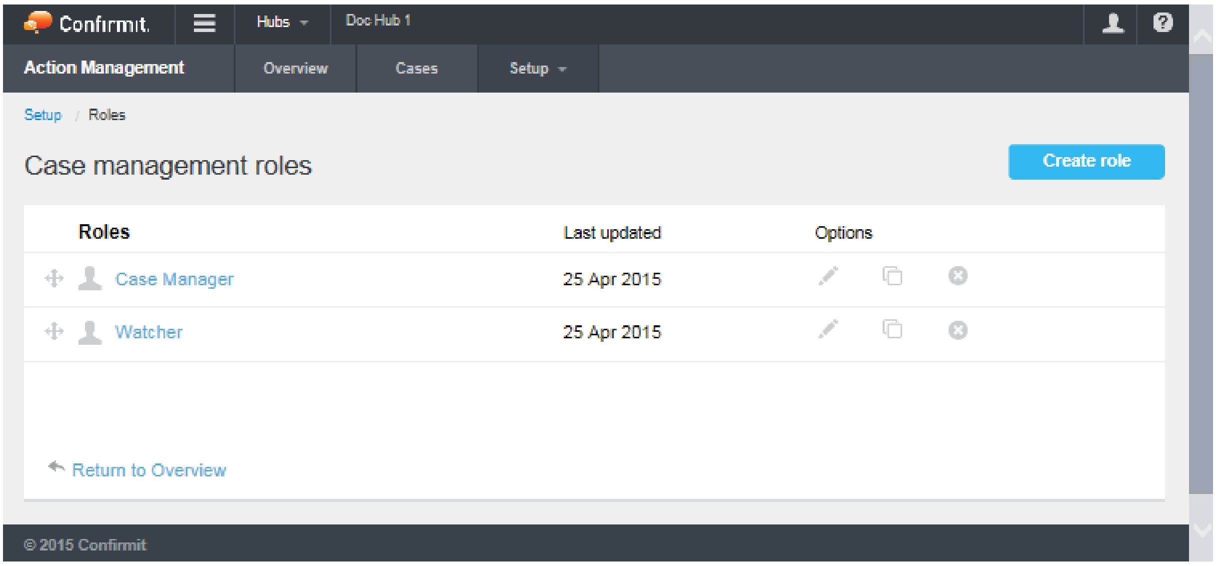


Figure 4 Example of the Case Management Roles page

2. Click **Create role**.
3. Type the name of the role into the field.
4. Click **Save**.

To change the name of an existing role, click on the blue role name link or the Edit icon and edit as required. On completion, click **Save**.

To delete a role, click the **Delete** button and confirm the action.

To change the order of the roles in the list, drag the Move icon for the role to the desired location.

Note that the same role may need different permissions - what the role is allowed to do - for different workflows. Permissions for the role are therefore set for each individual workflow when the workflow is created (see How to Create a New Workflow on page 16 for more information).

3.2. Attribute Lists

Use lists to categorize your cases. Here you define the lists, and the options available in those lists. You can create up to five different lists for categorizing your cases.

1. Go to the **Setup > Lists** menu item.

   The Case Management Lists page opens. The Status, Severity and Category lists appear by default and you can add up to two more. You can rename the lists as required.

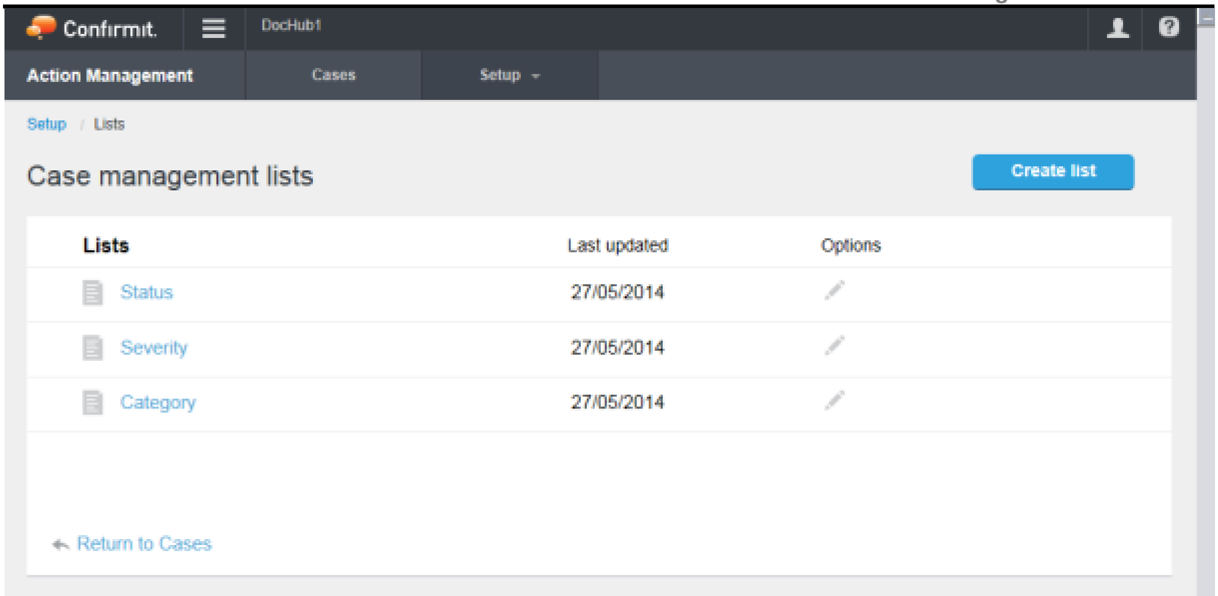


Figure 5 Example of the Case Management Lists page

3.2.1. Status

The Case Status is what ultimately decides whether a case is resolved or not. You can create different statuses for your users to select.

1. Rename the Status list if you wish.
2. You start with two statuses: Open and Closed. To create more, click **Add Item**.
3. Use the color palette picker to choose an appropriate color for each of the statuses.
4. Decide whether you would like each status to be designated open or closed. Open cases will still have the due date countdown running, while once a case is put in a status marked “closed”, the case will no longer go overdue.
5. Reorder your list items as required. The order on this page will be the order the users see them on the Manage Case screen (see The Manage Case Page on page 44 for more information).
6. Delete any list items you do not want, though bear in mind that you must have at least one list item marked as Open and one as Closed.

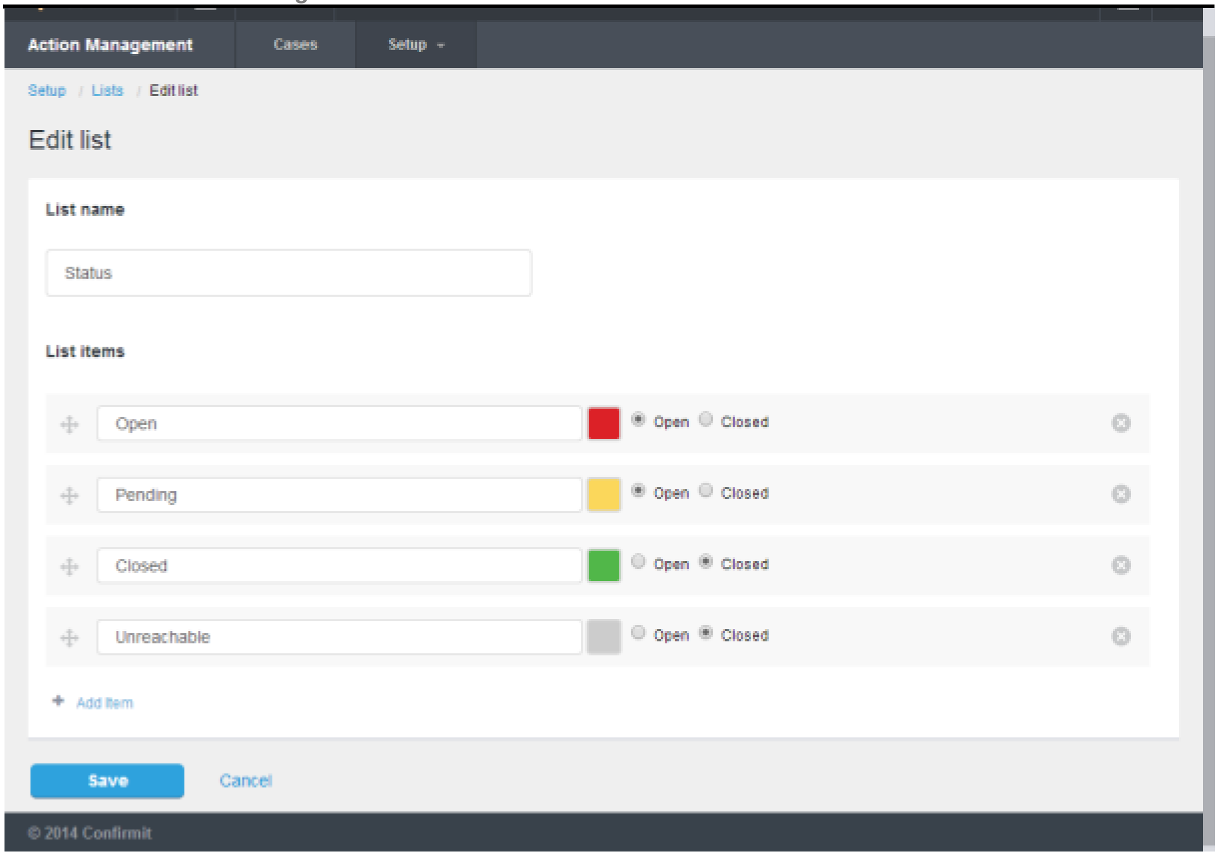


Figure 6 Setting up the Statuses

In the above example, two additional statuses are added: Pending and Unreachable. For this program, we have decided that these will be the four statuses that the users will be able to choose from.

When the case is first created, it will be Open (marked Red, as urgent). Once the user receives the email notification, they might sign in and change the status to “Pending” (Yellow), indicating that they have looked at the case and it is in the process of being resolved. Once the customer has been satisfied, the user will mark it as “Closed” (Green). But if they have made repeated attempts to reach the customer (perhaps because of a disconnected phone line), they can mark the case as “Unreachable” (Grey). Unreachable is listed as closed as there is nothing the user can do at this point, so the case will not go overdue.

This is only one example of the way you can use the Status list.

3.2.2. Severity

The Severity list defines the urgency of the case. As with Status this is a system-defined list, but you can customize it as you will.

1. Rename the Severity list if you wish.
2. You start with two severity options: High and Low. To create more, click **Add Item**.
3. Use the color palette picker to choose an appropriate color for each severity.
4. Decide whether you would like each severity to be designated high or low.
5. Reorder your list items as required. The order on this page will be the order the users see them on the Manage Case screen (see The Manage Case Page on page 44 for more information).
6. Delete any list items you do not want, though bear in mind you must have at least one list item marked as High and one as Low.

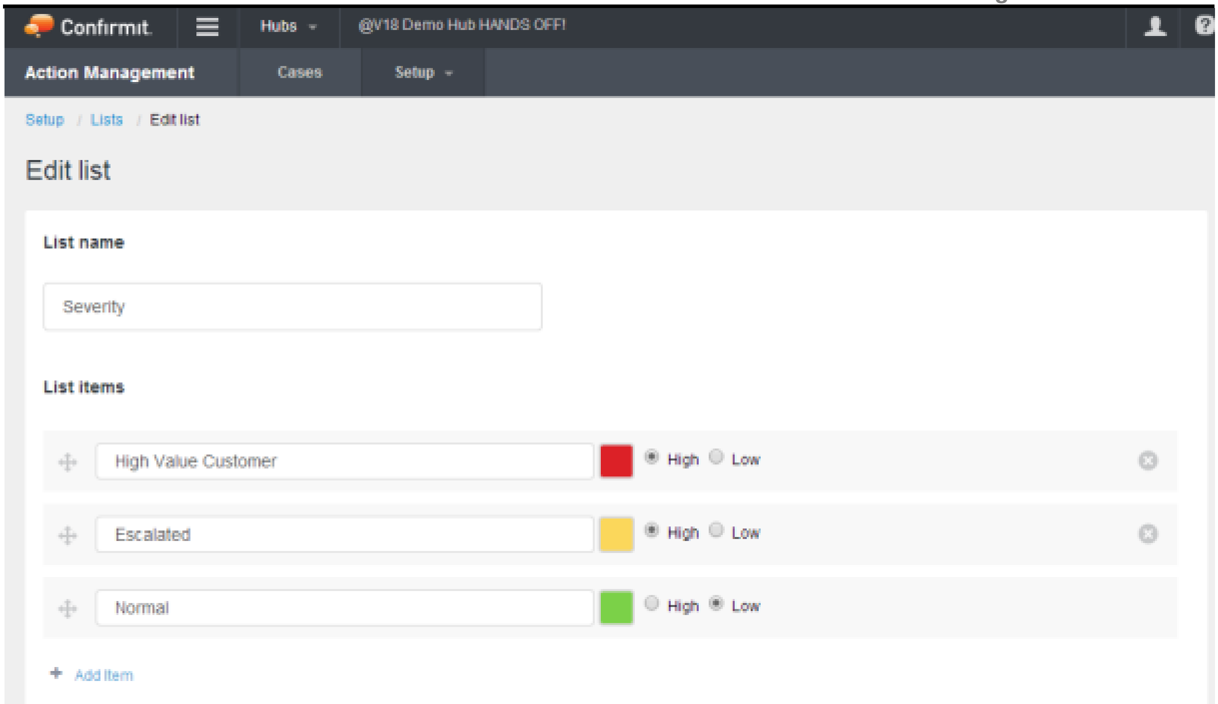


Figure 7 Setting up the Severity options

In the above example, we have created three severity options. A case starts as Normal, but if the customer becomes agitated or needs another user with more authority to solve their problem it can be changed to Escalated. Finally, we have a High Value Customer (someone who spends a great deal of money with the company) who might be assigned to a senior handler within the company. Both Escalated and High value Customer are marked as “High.”

This is only one example of the way you can use the Severity list.

3.2.3. Categories

Categories allow your users to classify cases properly, so that when running reports you can get a good view of how cases are solved or how problems arise.

1. Rename the Category list as required.
2. Create your Categories.
3. Indicate whether you would like your categories to have sub-categories, and define them as required.
4. Reorder your Categories as necessary.
5. Delete any Categories you do not want.

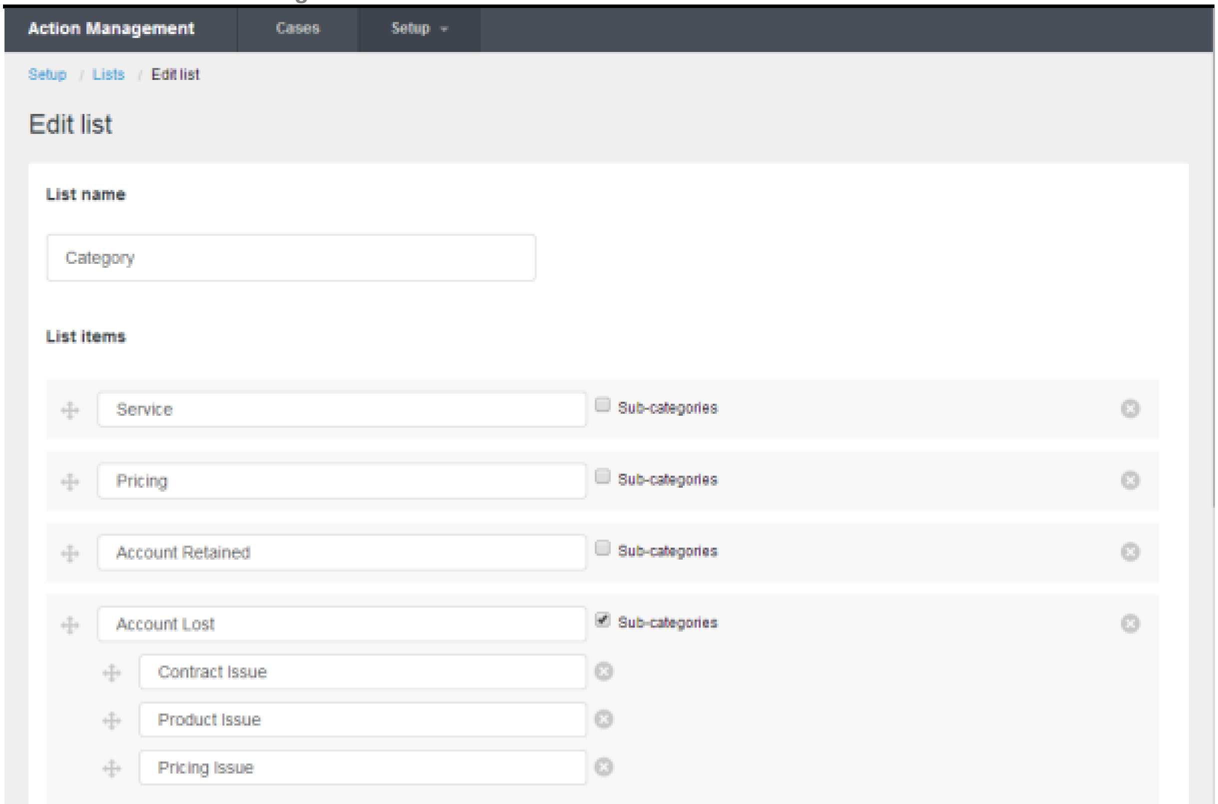


Figure 8 Setting up the Categories

In the above scenario we have set up a total of four categories. When the user resolves the case, they will need to categorize the case according to the outcome. They can choose between Service, Pricing, Account Retained and Account Lost. Under Account Lost there are three sub-categories, enabling the user to indicate why the account was lost. This will allow you to analyze your cases later, and hopefully identify your biggest drivers of business losses.

This is just one example of how you can use Categories in your AM program.

3.2.4. Custom Attribute Lists

In addition to Status, Severity, and Category, you can create your own attribute lists for your users to make use of.

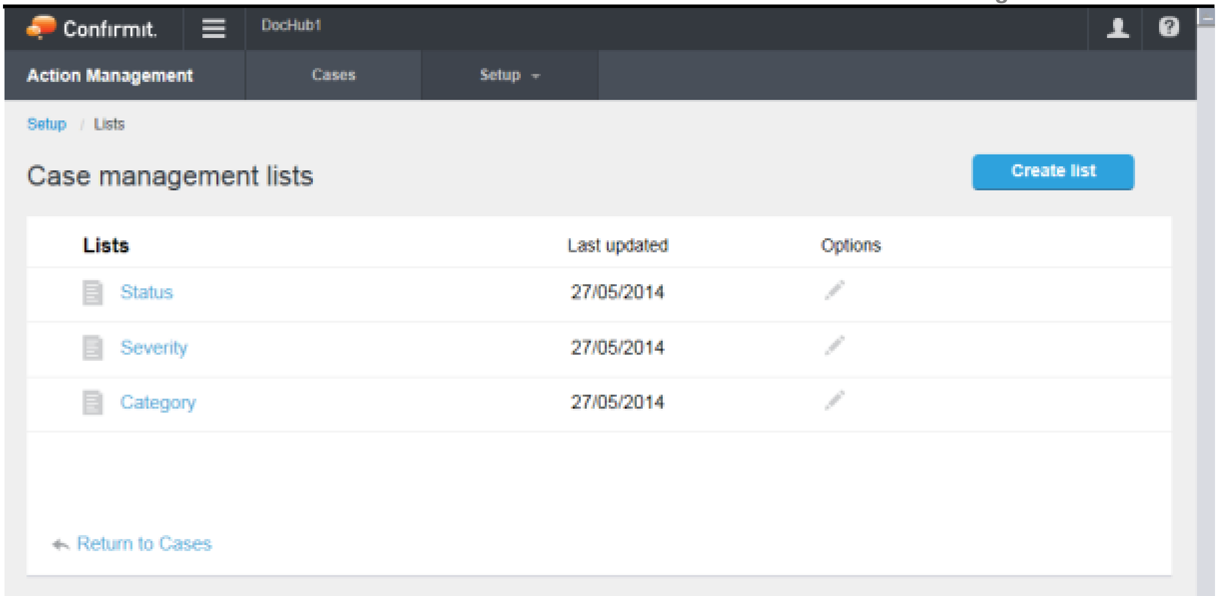


Figure 9 The Case Management Lists page

1. Click **Create list**.
2. Type the desired name of the list into the field.
3. Add the list items you require (click **Add Item** and type in the item name for each item you wish to include in the list).
4. Reorder your list items as required, delete any items you do not want.

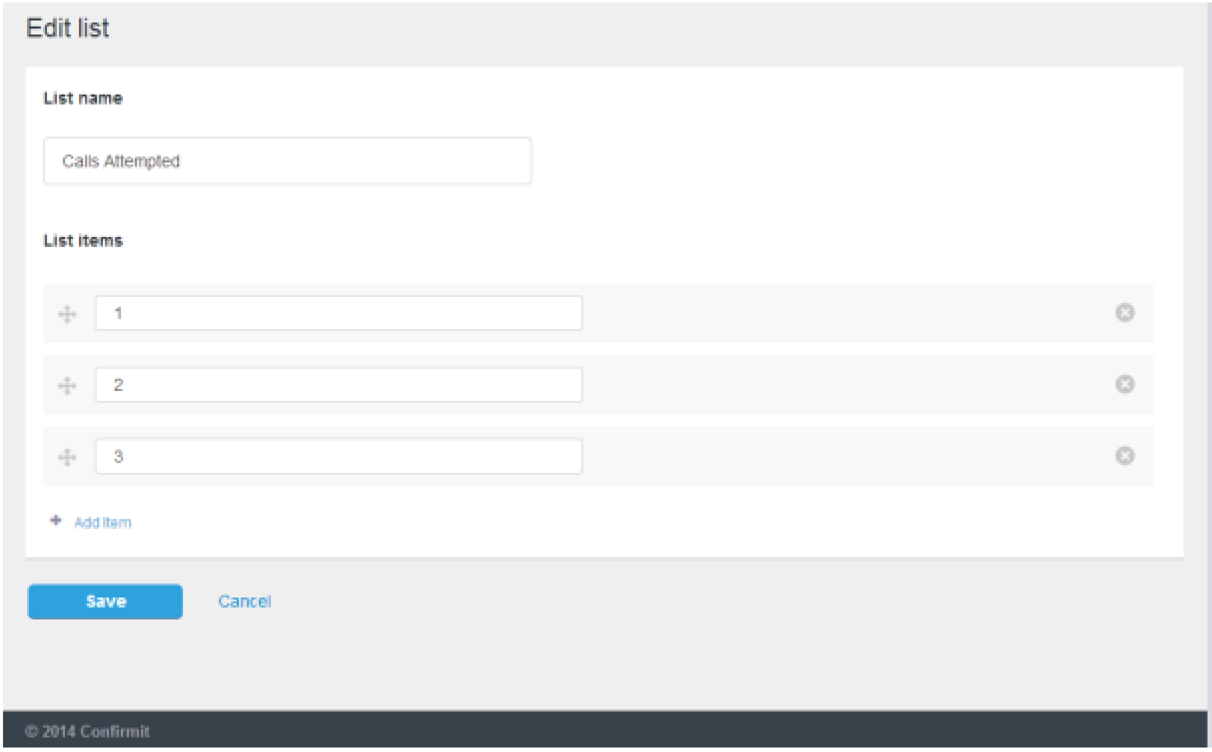


Figure 10 Example of a custom list

In the above example, we have created a custom list named "Calls Attempted., and our list items are 1, 2, and 3. This is so the users can track how many attempts they have made before changing a case to "Unreachable".

3.3. Data Field Labels

You have defined your case attributes and roles, but you also need to consider what information your users need to be effective. When creating a case, it is important that they have some information on the survey response that triggered it. Using Data Fields, you can provide that information easily.

When you click on the **Data Field Labels** link, you are provided with a list of 30 data fields. These are named Data Field Label 1 through 30 by default, however you can rename each label as you see fit; click on the **Options** icon to open the label for editing.

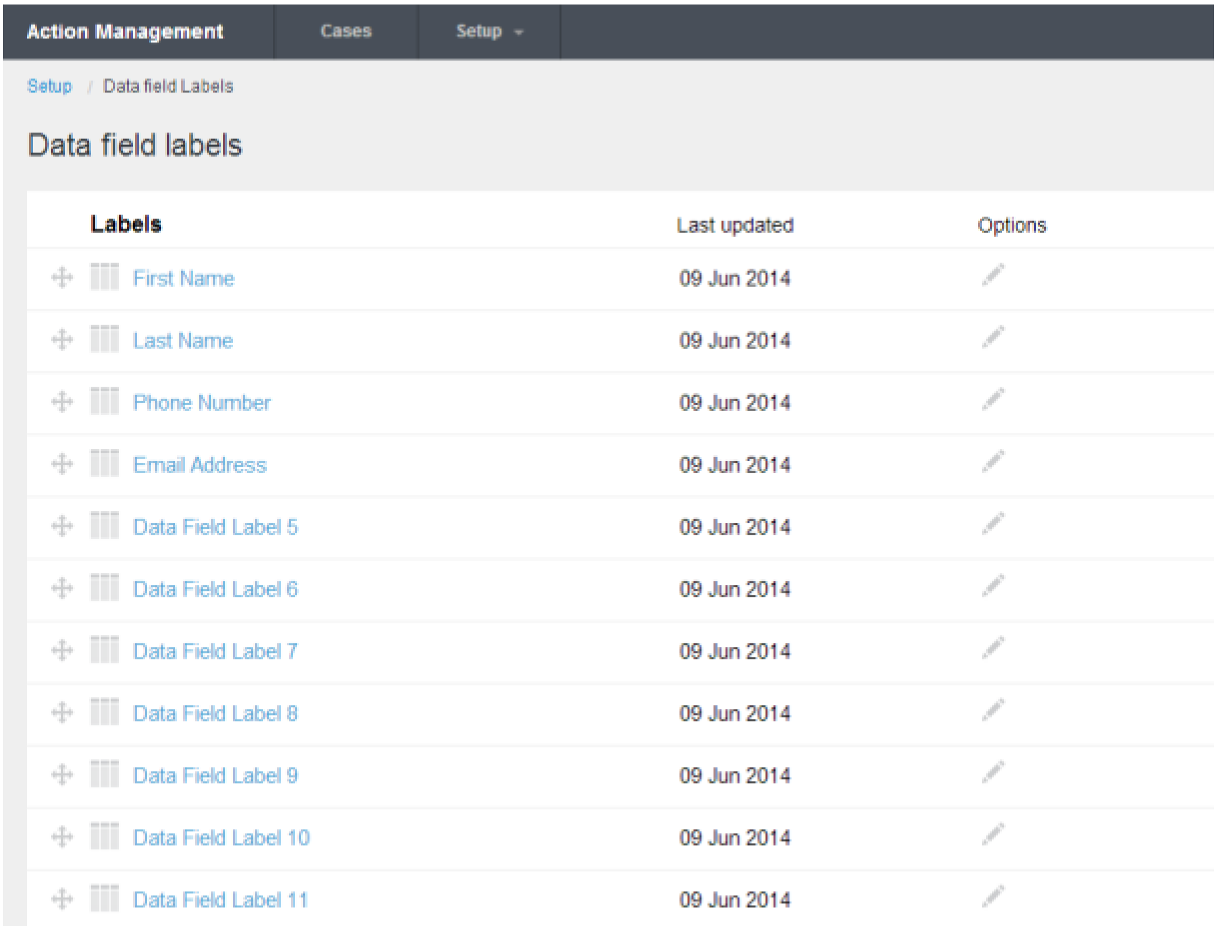


Figure 11 The Data Field Labels page

In the above example we have defined four data fields that will be useful to the users when they are attempting to resolve a case. When the case is created, we will need to map these fields to questions (or background variables) in the survey. These can be mapped from the triggers (see Triggers on page 29 for more information).

3.4. Email Templates

The emails that will be sent automatically to the users when a case is created or changed (see How to Create a New Workflow on page 16 for more information), are defined by templates. A template must be created and set up for each "type" of email that may be sent. To create and set up an email template:

1. In the Action Management toolbar, go to the **Setup > Email templates** menu item.

   The Email Templates page opens. If any templates already exist, they will be listed here.

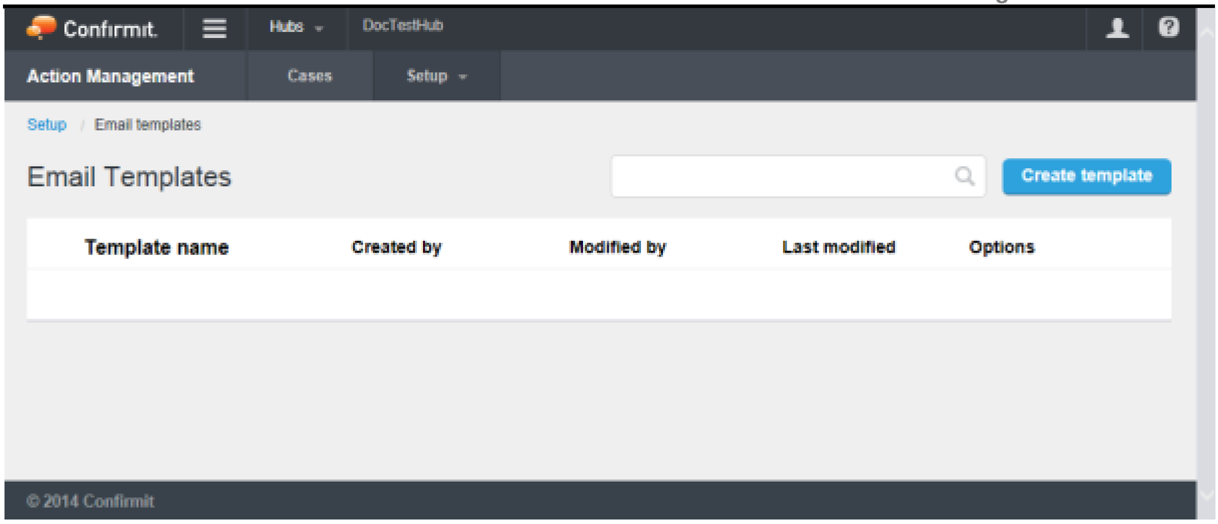


Figure 12 The Email Templates page

2. Click **Create Template**.

   The Create Template page opens.

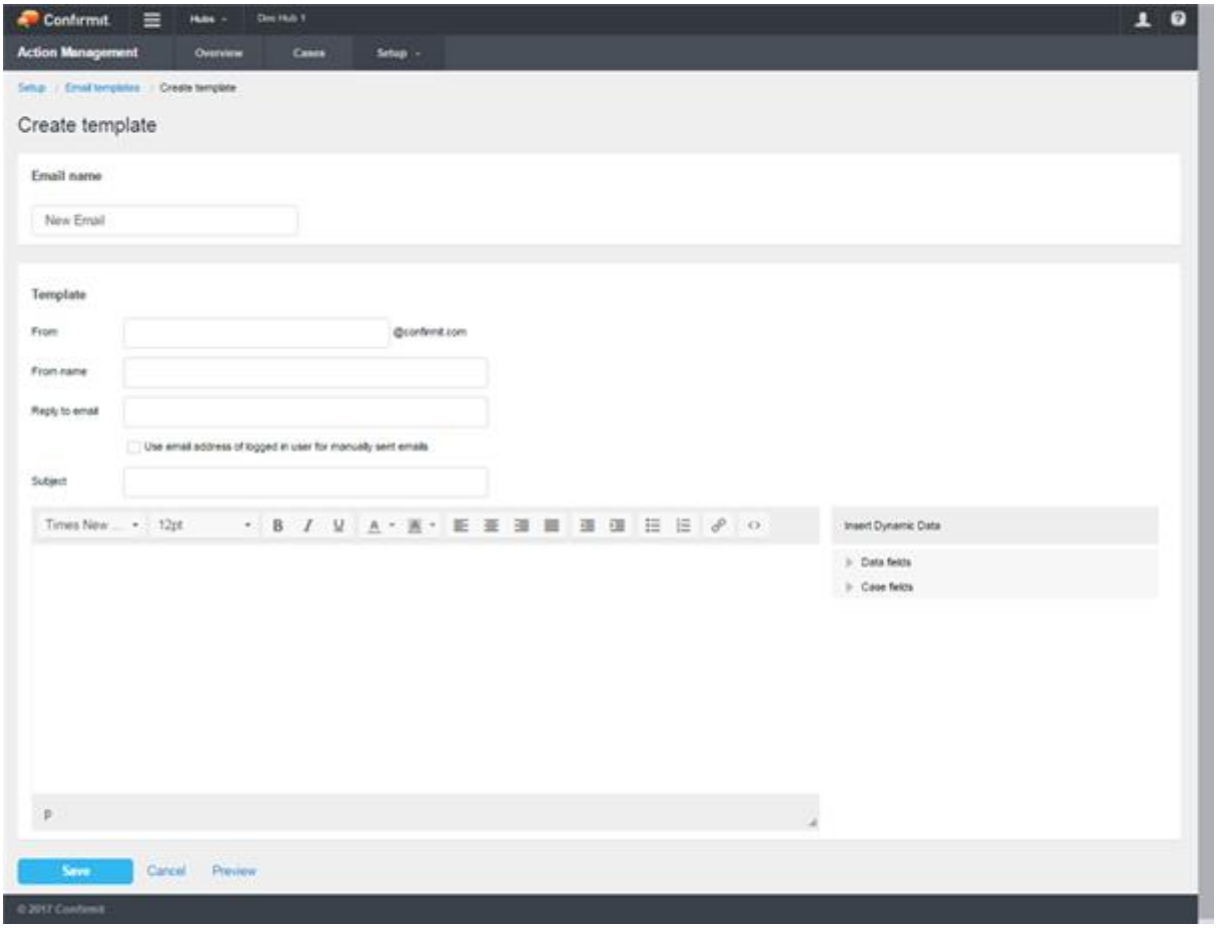


Figure 13 The Create Template page

3. Type a name for the email into the Email Name field.
4. In the From field, add a valid email address as the Sender.

5. If you wish to use a domain other than confirmit.com, please contact your account manager. Otherwise you can add your own email address to the Reply to email field to ensure that when someone replies to an email, it will go to you.
6. You can also check the "Use email address of logged in user for manually sent emails" box which in this case, when someone manually sends an email, their email address will be used to send the email.
7. Add a title into the Subject field.
8. Compose your email.

   Note that you can insert dynamic data components (case fields and data fields) into the text of the email by dragging them from the lists in the column to the right.
9. Click **Preview** to view the email as the recipient will see it (note that the dynamic data components will be filled in as appropriate by Action Management).

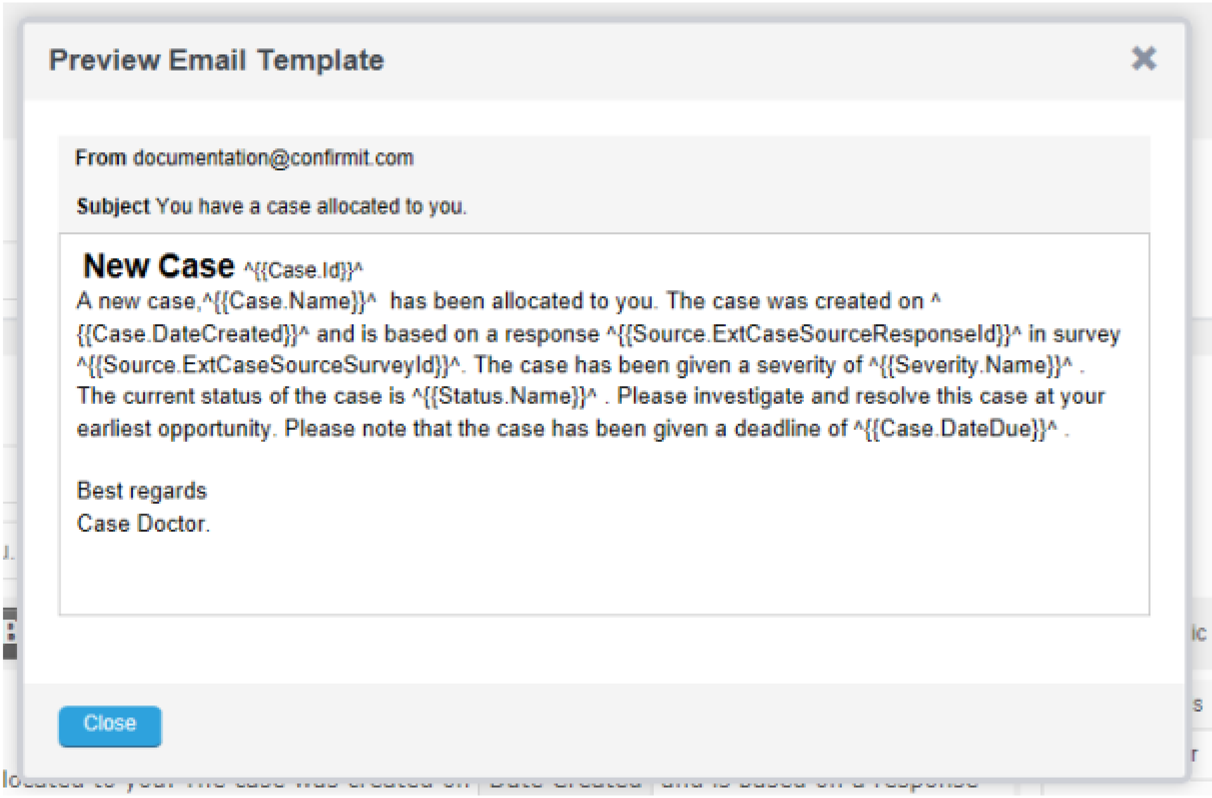


Figure 14 Previewing a template

10. Click **Close** to return to the Create Template page.
11. On completion, click **Save** to save the template.
12. Once you have created the required templates, go to the New Workflow page to specify which email template is to be used in a given situation (see How to Create a New Workflow on page 16 for more information).

3.5. Workflows

The Workflow is a critical part of your Action Management program in that it does two things:

1. It defines *the initial state of the case* when it is created - for example what list items are selected by default when the case is created.
2. It defines *how people work with cases*, what they are allowed to do, and when emails are sent out.

To open the Workflows page, click on the blue Workflows link in the Action Management Setup menu, or go to the **Setup > Workflows** drop-down.

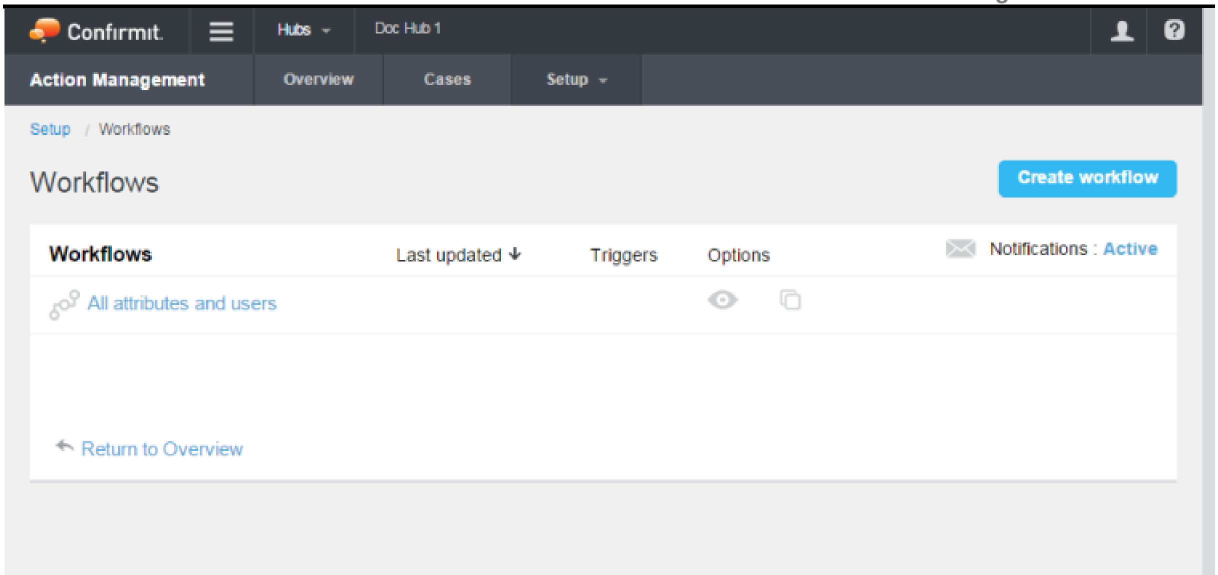


Figure 15 Example of the Workflows page

Note that you can deactivate Notifications to temporarily suspend sending email notifications. This could be useful for example if you are modifying your workflow and do not want any email notifications to be sent before you have completed the modifications.

The All Attributes and Users workflow is provided by default and this has a standard setup. It automatically defaults to the first item on your list, and all emails will be sent under all conditions. While it may be tempting to just use this system-provided workflow, it will not give you much control over how your users manage cases, so it is not recommended.

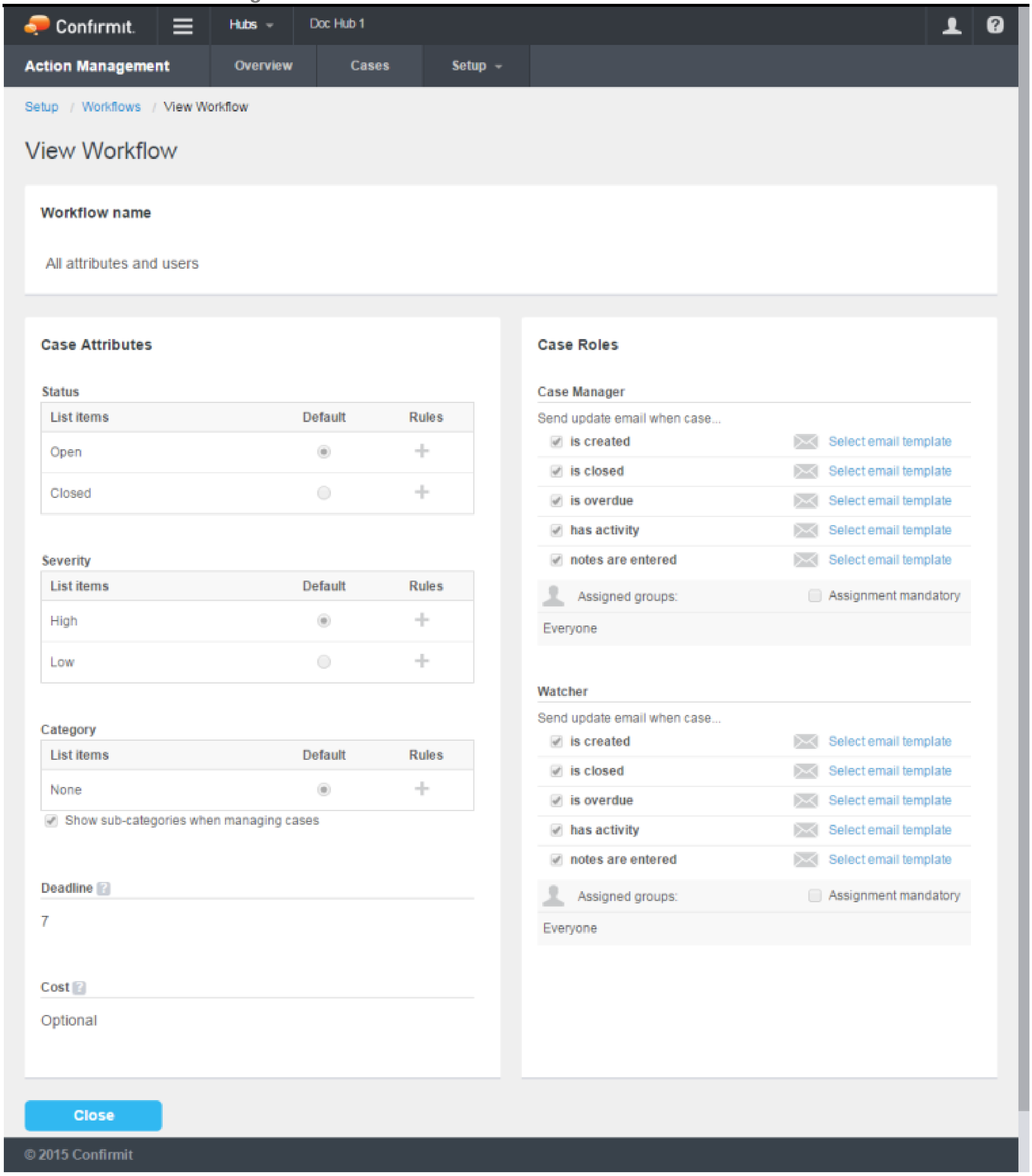


Figure 16 The default settings for the All Attributes and Users workflow

The lists and case roles available in the workflow will be those set up in the Lists (see Attribute Lists on page 6 for more information) and Roles (see Roles on page 6 for more information) pages.

3.5.1. How to Create a New Workflow

You might need one workflow for each survey in your program, or you may need different workflows for cases that are triggered from different questions within your survey. To create a new workflow:

1. Go to the **Setup > Workflows** page and click **Create Workflow**.

   The New Workflow page opens.

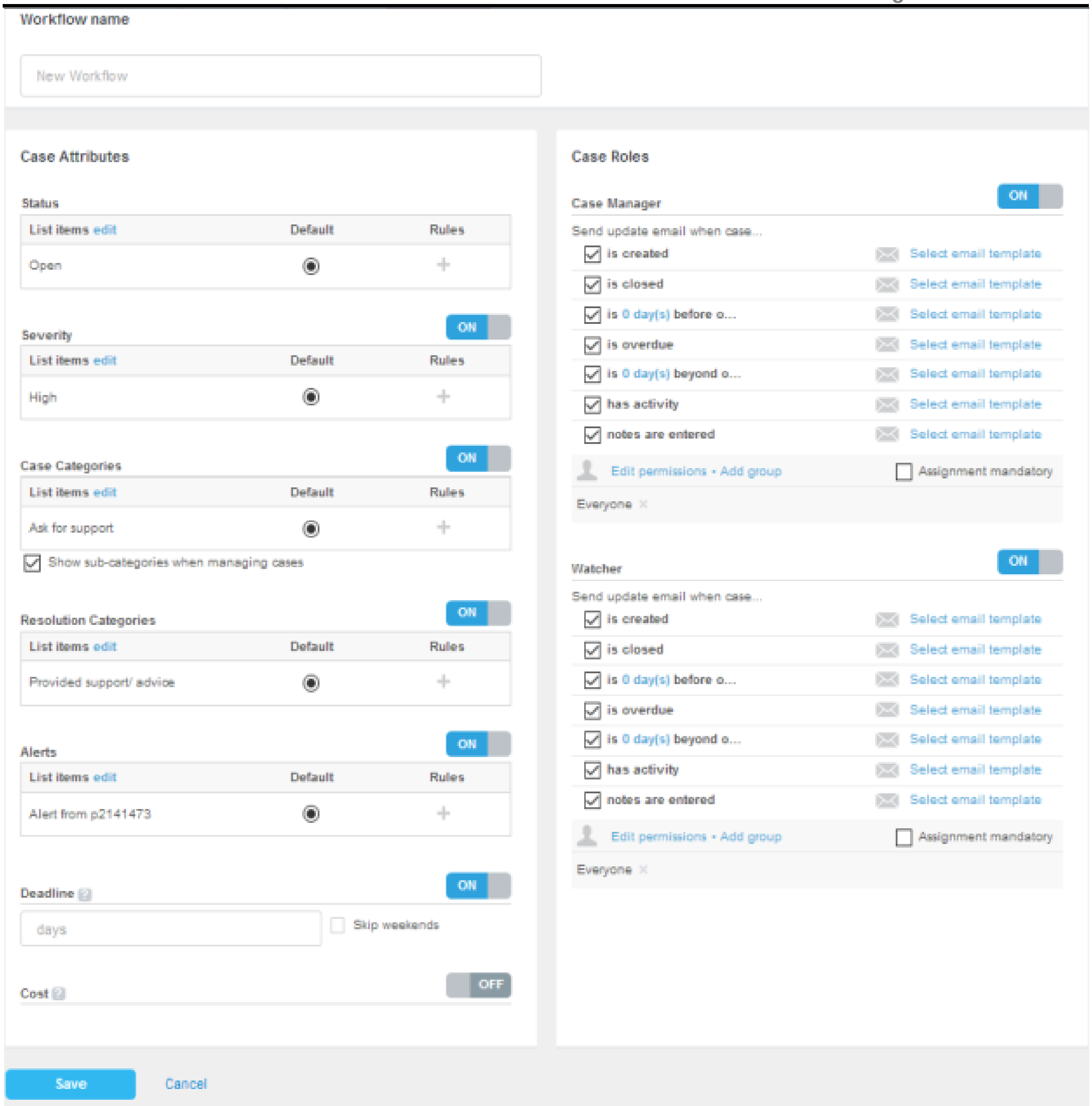


Figure 17 The New Workflow page

2. Give your workflow a logical name that allows you to find it again easily. For example the name could tell you what types of cases it is intended for.

3. In the Case Attributes pane you decide which of the attributes will be valid for this workflow; set the **On/Off** switch as required for each attribute.

   If a switch is set to **On** then various list items become available; if a list is set to **Off** the user will not see that attribute.

   If the Cost switch is set to **On**, then a field opens allowing you to add a default cost for a case created by this workflow. This cost will then show towards the bottom of the Trigger page.

   Note that **Status** must always be available so it does not have a switch.

4. For each list item for each case attribute, click the radio button to set the status that will be applied by default when the case is created.

5. Each list item allows you to add rules. To add rules for a list item, click the **+** icon. The List Item Rules overlay opens.

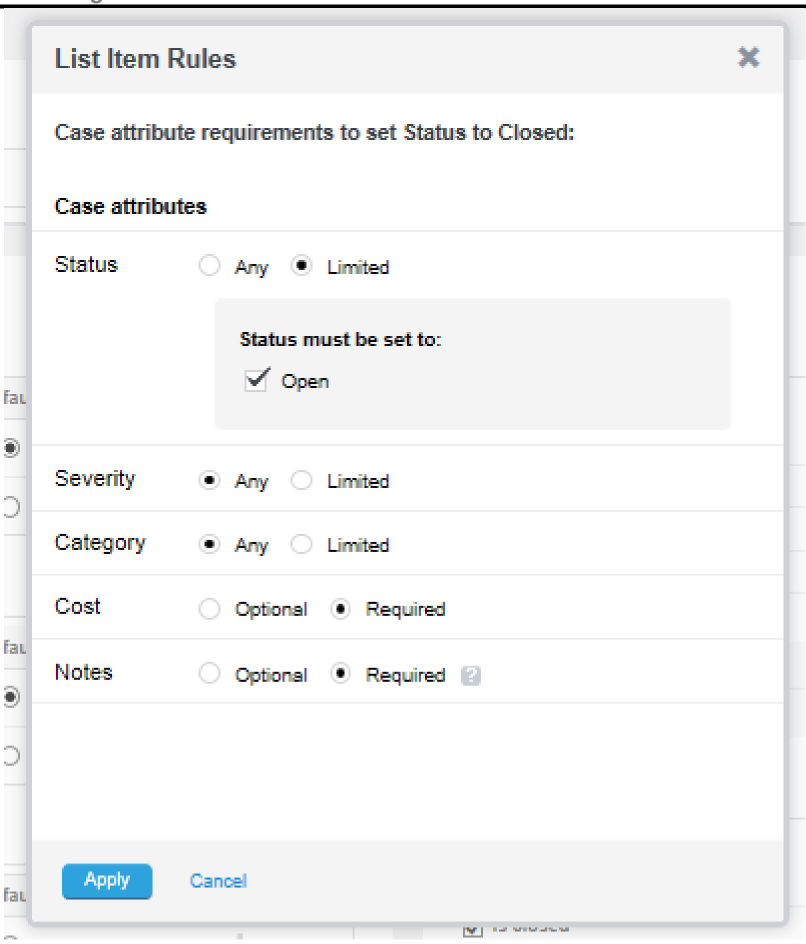


Figure 18 Example of the List Item Rules overlay for Status = Closed

Here you set the conditions that must be satisfied if the user to be able to set the attribute. For example, for the user to be able to set the status of a case to Closed, the required attributes would include that the case must first be open, and could require that some notes have been added. Once rules have been applied to an attribute, the + icon changes to the Edit icon so you can change the rules at any time.

Note: If the rules require that notes are added, these must be added "manually"; notes added automatically by the system do not qualify.

When a case attribute is set to **On**, the **Edit** link beside the attribute enables you to set the list items to **Limited** and to set which of the available list items are to be selectable for this attribute; click **Edit** and uncheck the boxes for those list items you do not wish to be used for the particular attribute.

6. Does your case have a deadline - do you want it to be resolved within a specified period? If this attribute is set to **Off** then there will be no deadline for cases using this workflow. If it is set to **On** then you must input the number of days within which the case is to be solved. If a case is not solved within this deadline then it will be defined as Overdue. Note that you can specify "working days" by checking the Skip weekends box.

7. If it is relevant to the workflow you can give users the ability to enter a numeric cost associated with the case. If this feature is set to **On**, users will be allowed to enter any numeric value into the field. You can add a starting (minimum) cost.

8. Decide what roles are relevant to this workflow, and what each person in the roll can do. In the right column, set the **On/Off** switch to **On** for each of the Roles that you wish to be involved in cases to which this workflow is to apply. For each role that you set to **On**, a number of check boxes appear.

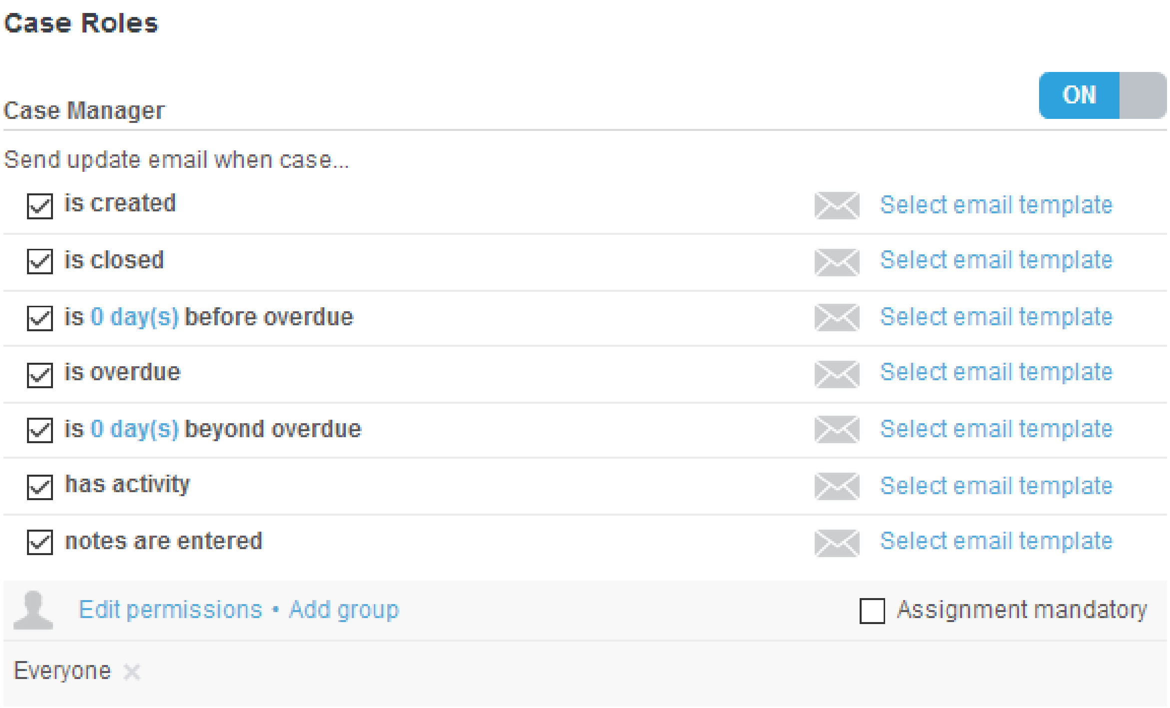


Figure 19 The role options

9. Select **Email Templates** There are seven situations which can trigger an email to be sent to users. Select the required check boxes to specify in which situations the user assigned in that role will receive an email, then select which email template (see Email Templates on page 12 for more information) will be sent to the user in that situation.

   - **Is created -** sends an email when a case has been created. A note will be entered in the Case Log when this email is sent.
   - **Is closed -** sends an email when the case has been changed to any closed status.
   - **is** ***n*** **days before overdue** - sends an email when the case approaches its deadline, when it is *n* days before the deadline date. Click *n days* to configure the threshold. Note that to use this option you should turn ON the Deadline setting (in Case Attributes).
   - **Is overdue -** sends an email when the case is 24 hours beyond its deadline. A note will be entered in the Case Log when this email is sent. Note that to use this option you should turn ON the Deadline setting (in Case Attributes).
   - **is** ***n*** **days beyond overdue** - sends an email when the case is *n* days beyond its deadline. Click *n days* to configure the threshold. Note that to use this option you should turn ON the Deadline setting (in Case Attributes).
   - **Has activity -** sends an email whenever anything on the upper half of the Manage Case screen is altered, included cost, any attribute lists, deadline, case role assignments, or workflow changes.
   - **Notes are entered -** sends an email whenever notes are entered into the Case Log. Note that this only applies when a user actually types notes; system-generated notes do not send emails.

10. For each role that you set to **On**, click **Edit Permissions** to open the Permissions selection overlay for that role. Here you specify what a user in each role is allowed to do when they are assigned to a case.

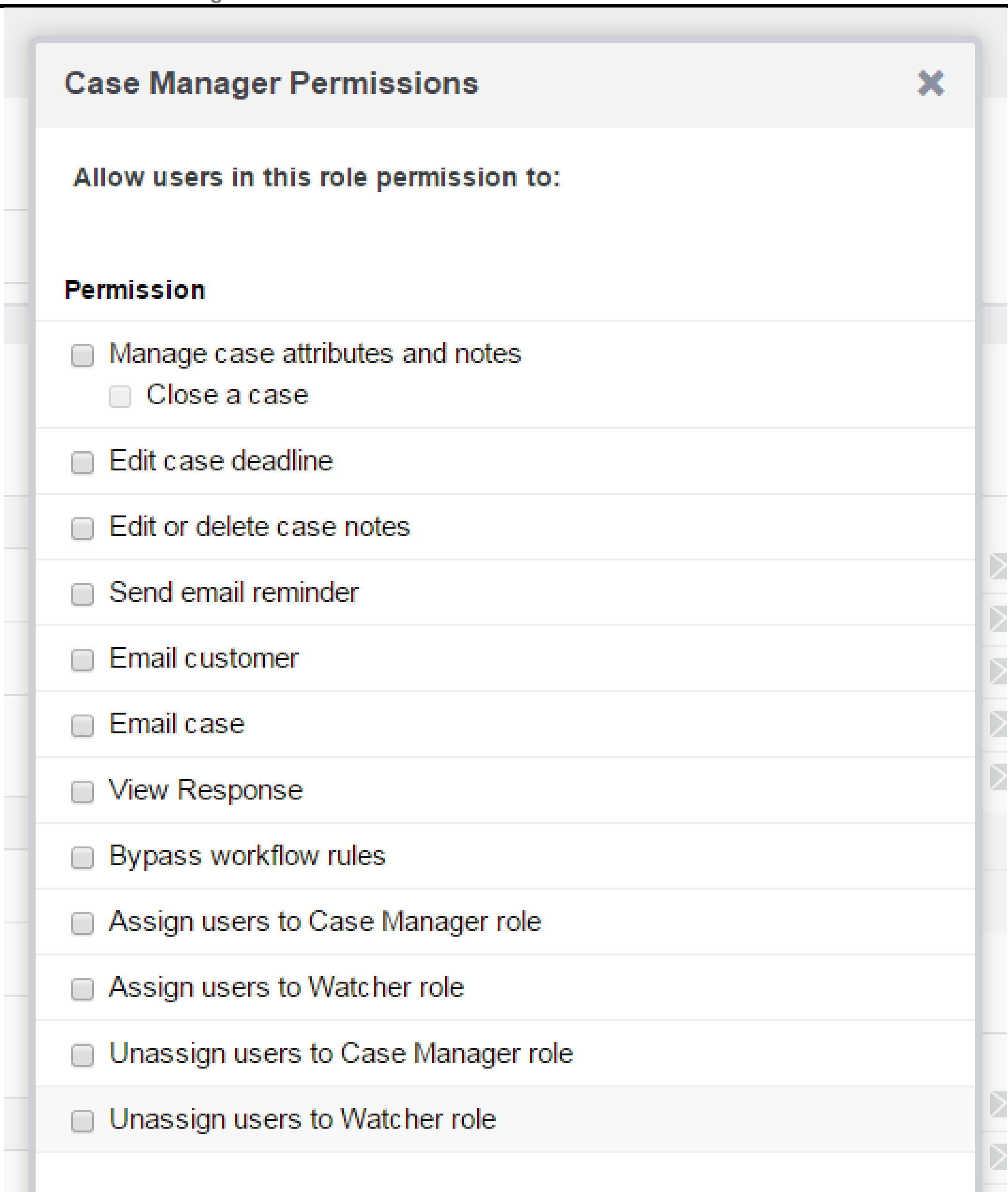


Figure 20 The Permissions overlay for a case manager

- **Manage case attributes and notes -** allows the user to make changes to all of your attribute lists. You may want to turn this off if you intend to have a small number of users who are initially assigned cases, then triage and reassign the cases to other users for resolution. Or you may want to give some users email notification and permissions to see the case, but not to manage it.
- **Close a case -** allows the user to close a case.
- **Edit case deadline -** allows the user to extend the due date before a case is considered overdue. This may be useful if you have an auxiliary role of a supervisor, who can determine if extra time is warranted (you do not want every user to be able to give themselves extra time because they are feeling lazy).
- **Edit or delete case notes –** Without this permission, the user is prevented from editing or deleting case notes that have previously been entered on the case.
- **Send Email Reminder –** allows the user to send a reminder email to other users assigned to the case.
- **Email Customer –** allows the user to send an email to the person who completed the survey. Note that emails can only be sent to email addresses in the "email" field of the survey. If there is no email field, or if the email field is blank for that response, the user will receive an error.

- **Email Case -** allows the user to forward the case information to another user or another email address.
- **View Response –** Without this permission the user will not have access to the “View Response” link. Disable this permission if there is sensitive information in the survey response that you don’t want your users to see.
- **Bypass workflow rules -** this allows the person in the selected role to bypass all of the List Item rules that you have set up. Note that only End Users who are assigned to a role WITHOUT this permission are bound by the rules. Professional End Users are not bound by these rules by default.
- **Assign users -** allows the user to add additional users to the role. This would for example be appropriate for the supervisor role.
- **Unassign users -** allows the user to remove other users from the role. Note that if the “Assignment Mandatory” box is checked, they will be prevented from removing all users; it will not be possible to remove the last user.

Check the appropriate boxes to give the required permissions to the role for this workflow, then click **Apply** to close the overlay.

4. **Groups -** When a user is adding other users to a case, they are restricted to picking users within the groups assigned here. You can set up Groups within the End User Lists section of Survey Authoring. Additionally, there is also a group called “Everyone” that includes all the users on your list by default.
5. Save the workflow.

3.6. Filters

Filters are used to decide when it is appropriate to create a case. For example, for a survey that asks customers how satisfied they are with the product they have purchased, you could create a filter to pick out responses with a satisfaction rating of 6 or less such that cases will be triggered so these dissatisfied customers can be contacted. You can create any number of filters, using different conditions, such that cases can be triggered for a variety of reasons.

A filter can contain any number of conditions.

The currently supported question types are Single, Multi, Open, Numeric, Grid, Multi Grid, Open List, and Numeric List. Note that the behavior of the condition builder varies depending on which question type you select.

3.6.1. How to Create a Filter

A case will be triggered when the conditions selected in the filter are met.

1. In the **Action Management Setup** menu click **Filters**, or go to the **Setup** menu and select **Filters**.

   The filters page opens. This page lists all the filters currently available to you.

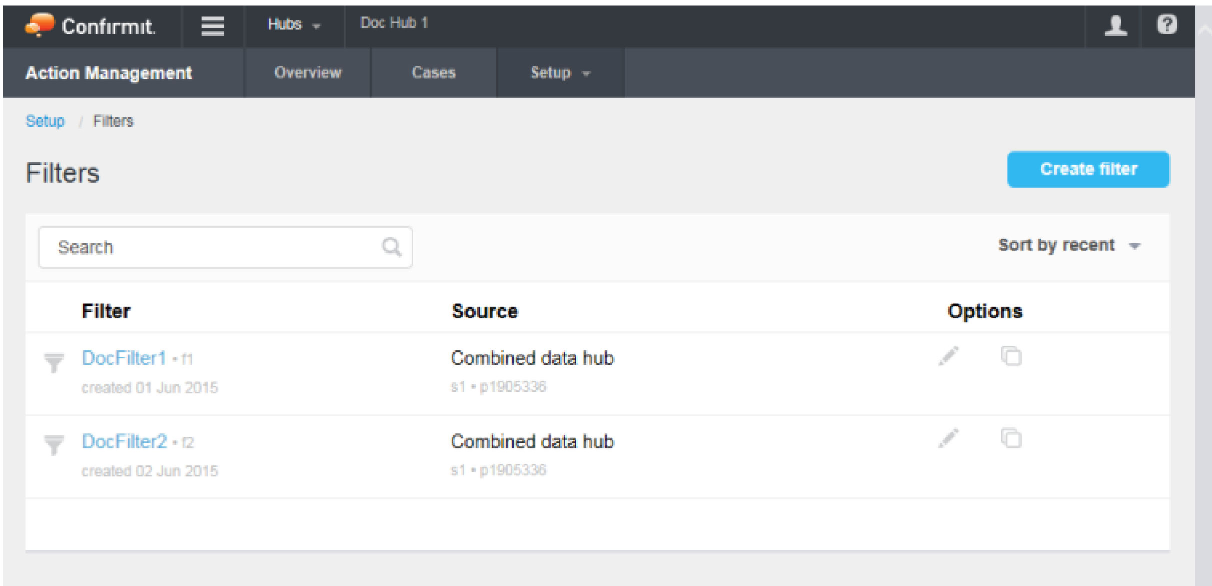


Figure 21 The Filters page

2. Click **Create filter**.

   The Create filter overlay opens. As filters must be associated with a data source, this initially lists the sources (surveys) that you have access to.

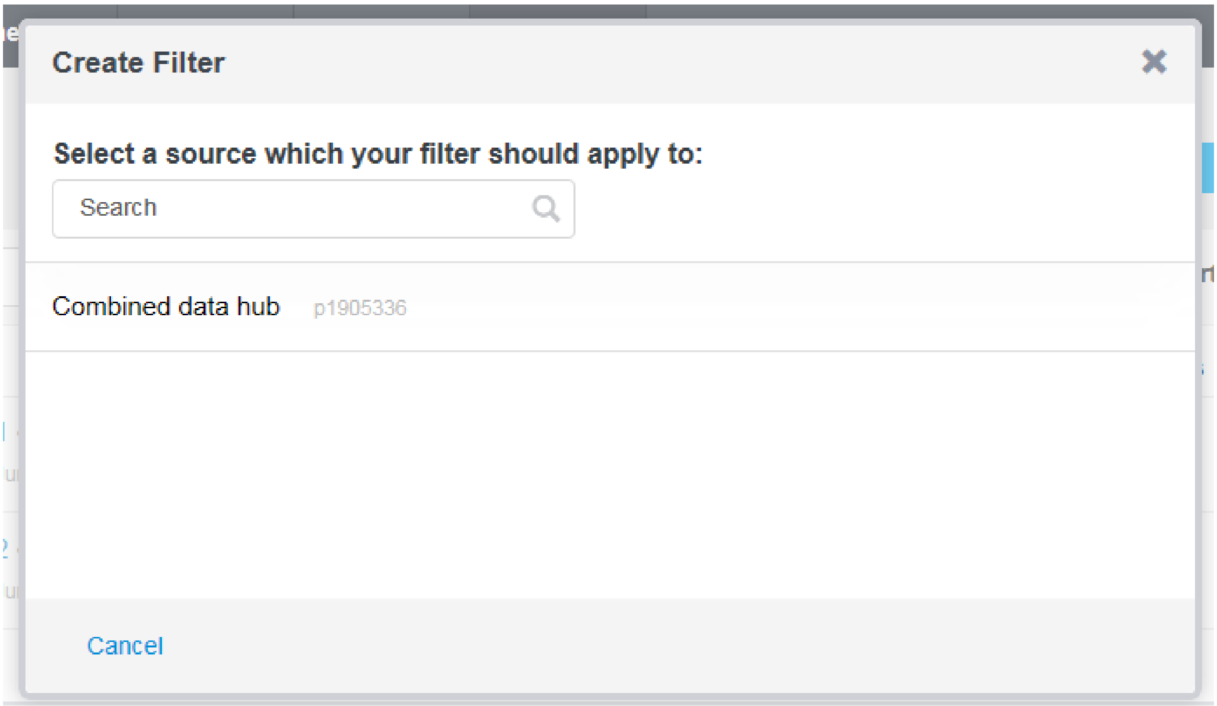


Figure 22 The initial Create Filter overlay

3. Select the data source (survey) that you wish to use.

   The overlay changes to allow you to set up the conditions for the filter.

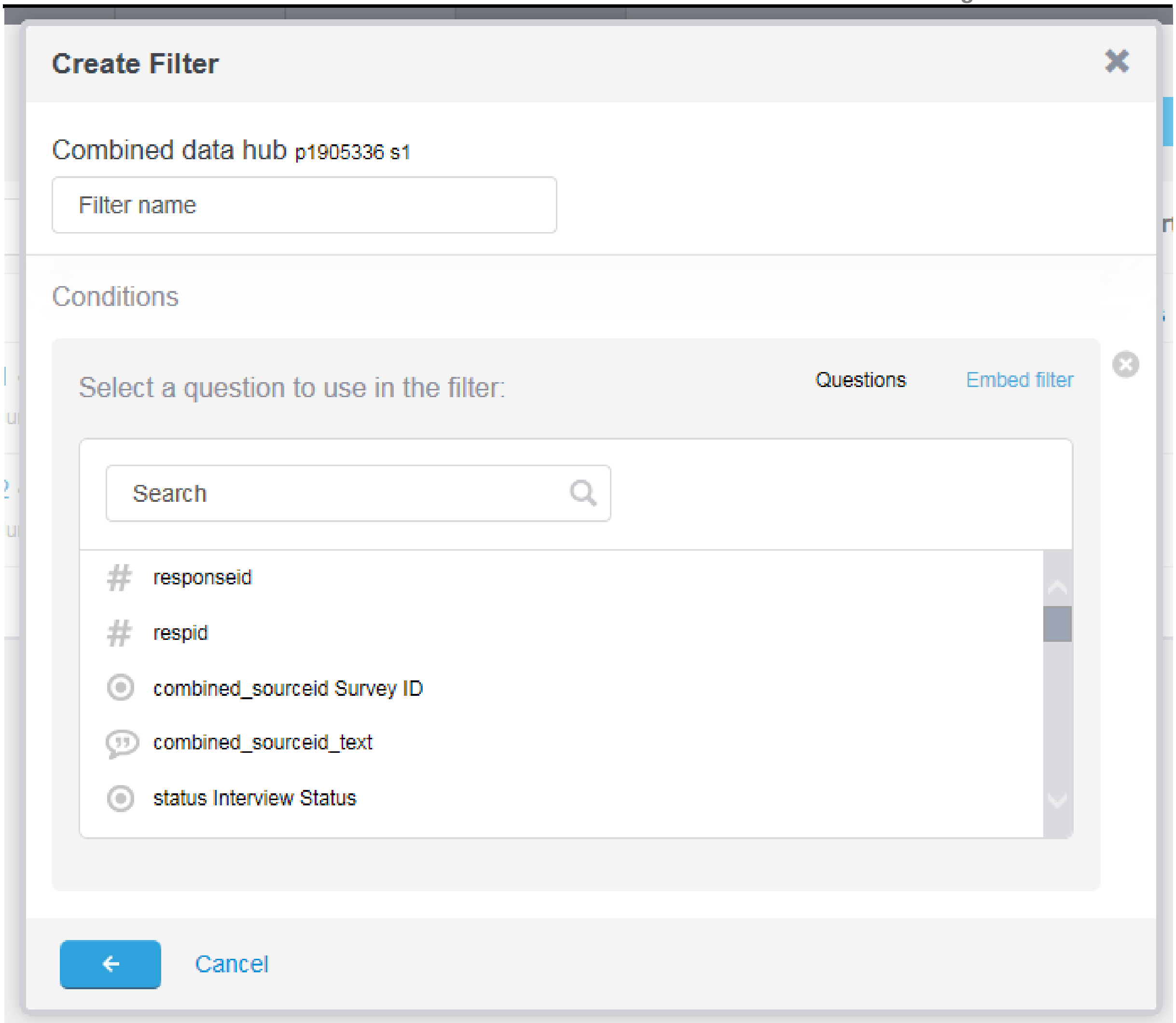


Figure 23 The expanded Create Filter overlay

4. Type a name for the filter into the Filter name field.

   All the questions of the supported types that are included in the selected survey are presented. The supported question types are, Single, grid, open text, open text list, multi, multi list and numeric.

5. Select the question that you wish to base the first condition on.

   When you select a question, a Match / Don't match selection box and a number of options are presented. Note that different question types have different options available (see The Question Options on page 25 for more information). The figure below shows an example of a filter where a case will be triggered if the response to a "Satisfaction" question is 6 or less.

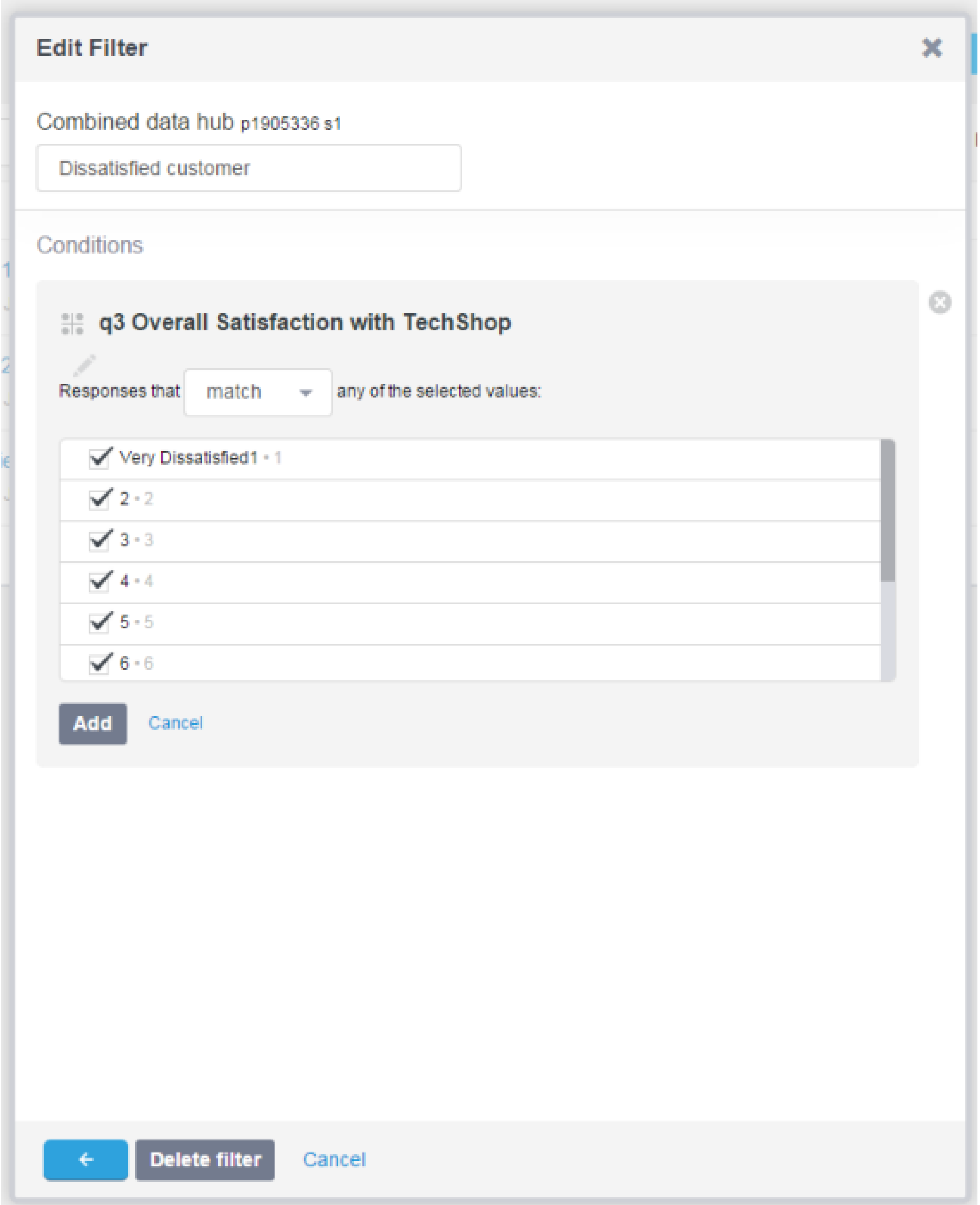


Figure 24 Selecting the answer options for a condition in the filter

6. Select whether you want the filter to include responses that match or do not match the criteria you have selected here.
7. Select the criteria as appropriate to the question type.
8. On completion click **Add**.

   The condition is added to the filter.

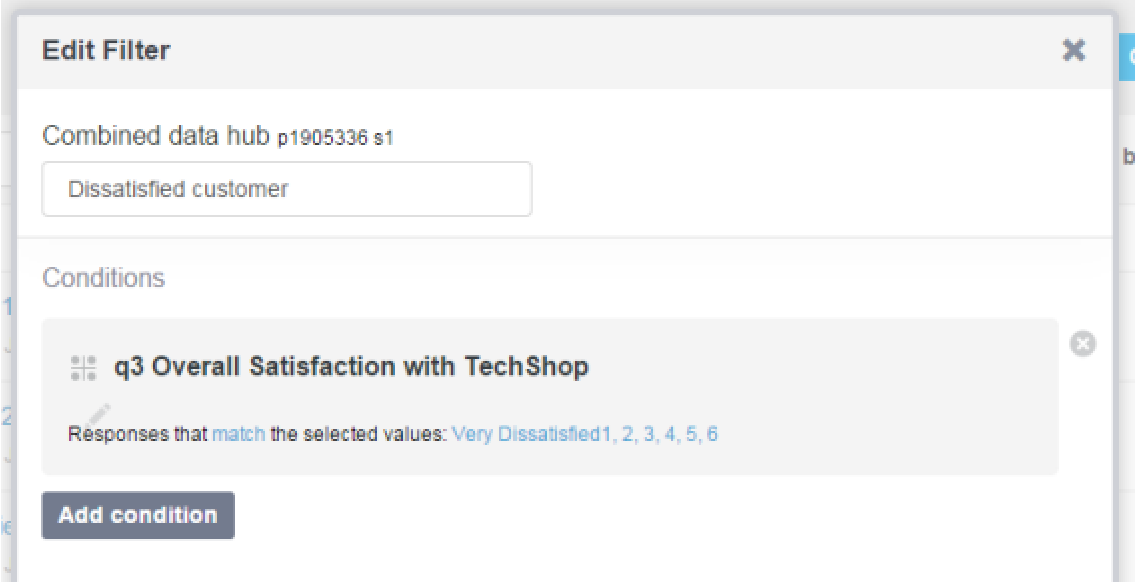


Figure 25 Example of a condition that will trigger a case when responses match "dissatisfied" scores

Note that you can add as many conditions (questions) to the filter as you wish (see Multi-Condition Filters on page 25 for more information).

You can also nest filters, in other words embed additional filters in the first filter (see Nesting Filters on page 26 for more information). For example you could have a main filter to extract dissatisfied customers, with other filters embedded within it that activate when the respondent is from a specific region, allowing you to direct cases to the appropriate support team.

Note that you can only nest one level; you cannot embed a nested filter into another filter.

3.6.2. The Question Options

Selecting different question types will yield different options when setting your conditions.

- Single questions will present you with a list of all possible options from your question. You can select as many options as you like, and the filter will include any responses with any of those answer options selected.
- Multi questions function in the same way as single questions, but it is important to note that this is an OR statement. If a survey respondent only selects one of the options you included in your condition, your filter will pick it up. If you only want to pick up responses where all options were selected then you must separate each option into a separate condition.
- Open questions allow the following:
  - "Is": The string provided by the respondent exactly matches what you type. You can add several strings by using a | as a delimiter.
  - Blank/Empty: The question has no value (was left blank or skipped during the survey).
- Numeric questions allow you to pick up responses that are either greater than, less than, or equal to the value you provide. You can also select Blank/Empty.
- Compound questions (Grid, Multi-Grid, and Open list) function the same as the above, but before selecting your answer choices you must select which prompts you wish the filter to apply to. Selecting more than one will use an OR condition. If you want to pick up responses that give similar answers to more than one prompt, you must separate them into different conditions.

Note: Date, Geolocation, Numeric List, Ranking, and Loop questions are not currently supported by Filters.

3.6.3. Multi-Condition Filters

You can add as many conditions (questions) to a filter as you wish. To add additional conditions, click **Add Condition** and repeat the process creation process (see How to Create a Filter on page 21 for more information).

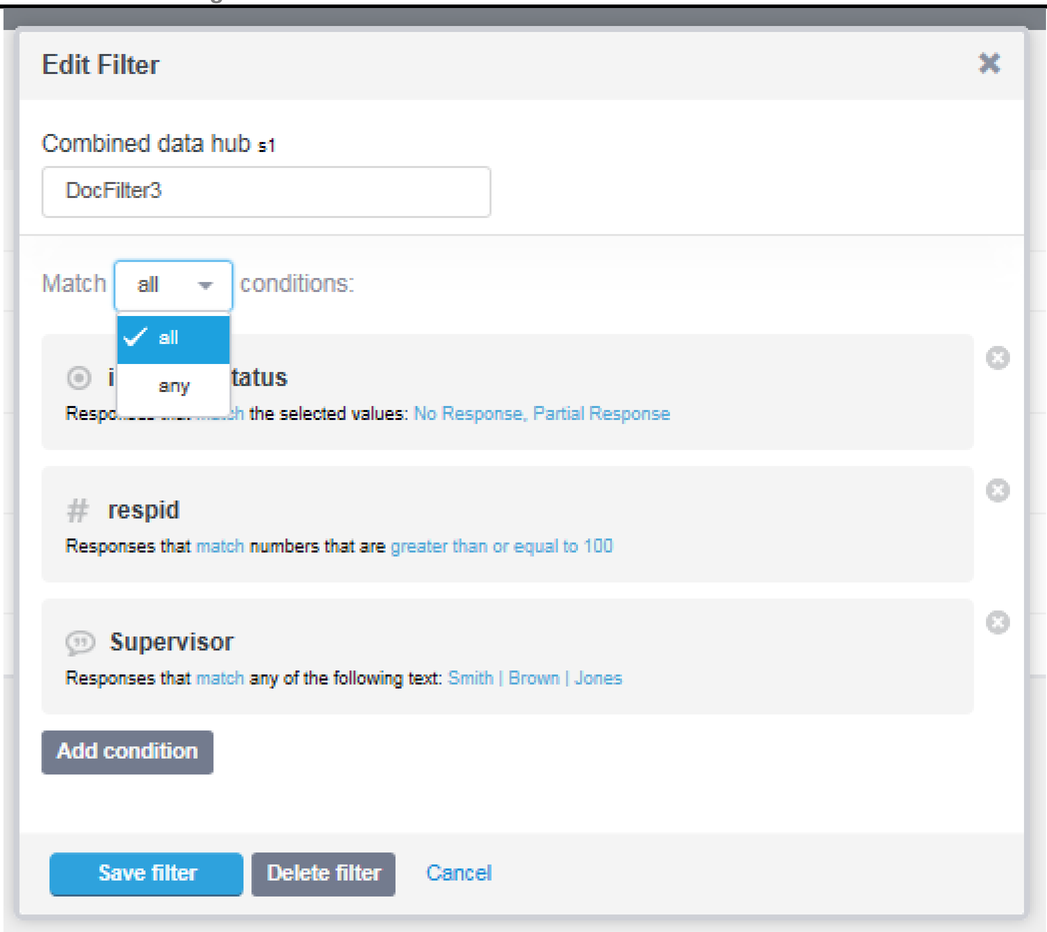


Figure 26 Example of a multi-condition filter

If you have more than one condition in the filter then an additional option appears. Here you can select whether you wish the filter to match all the conditions (so a case will only be triggered if all the conditions are satisfied simultaneously), or you can have the filter match any of the conditions (so a case will be triggered if one or more of the conditions are satisfied).

On completion of the setup, click **Save filter**.

3.6.4. Nesting Filters

You can create nested filters; that is, embed one filter into another.

Note: You can only nest one level; you cannot embed a nested filter into another filter.

To create a nested filter:

1. Create the filter or filters that you wish to embed into the "top level" filter (see How to Create a Filter on page 21 for more information). Note that you can edit these filters at any time.
2. Create the "top level" filter.

   Note that the selection list displays by default the questions available in the selected data source.
3. In this filter, click **Embed filter**.

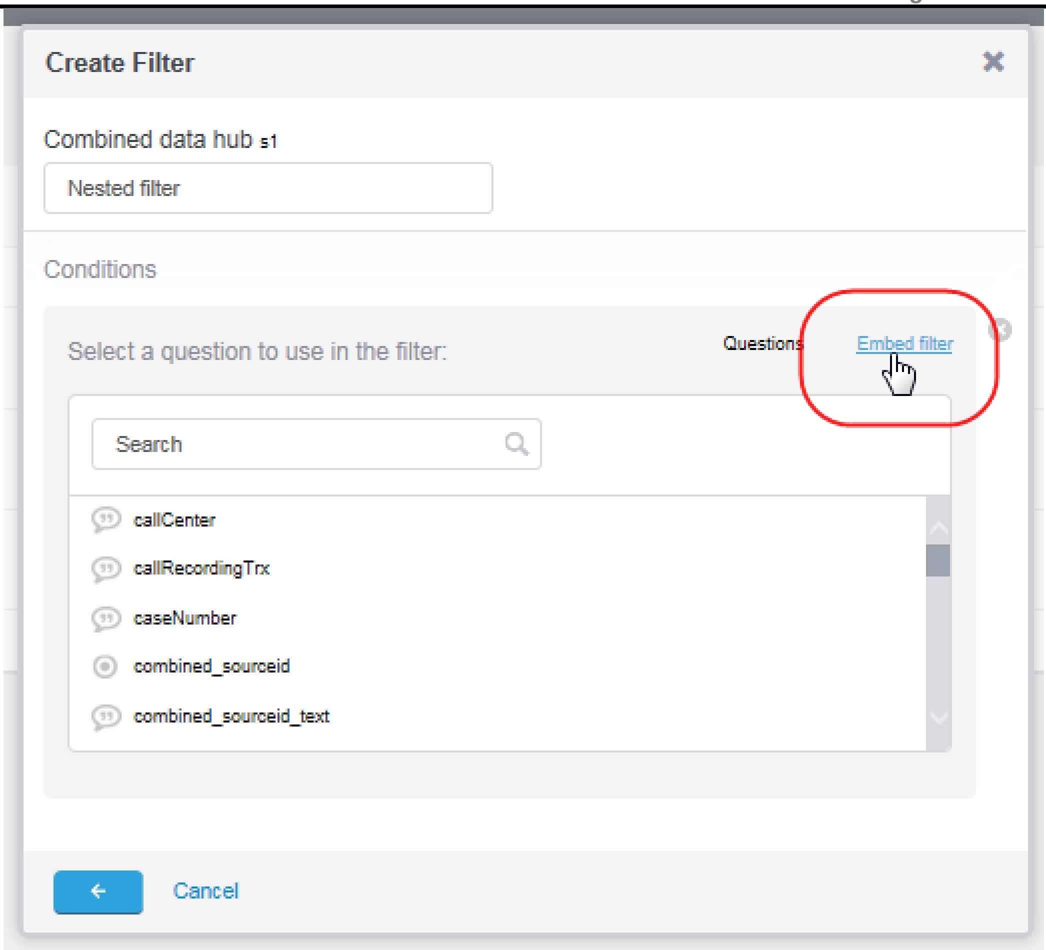


Figure 27 Creating a nested filter

This changes the list to display the available filters.

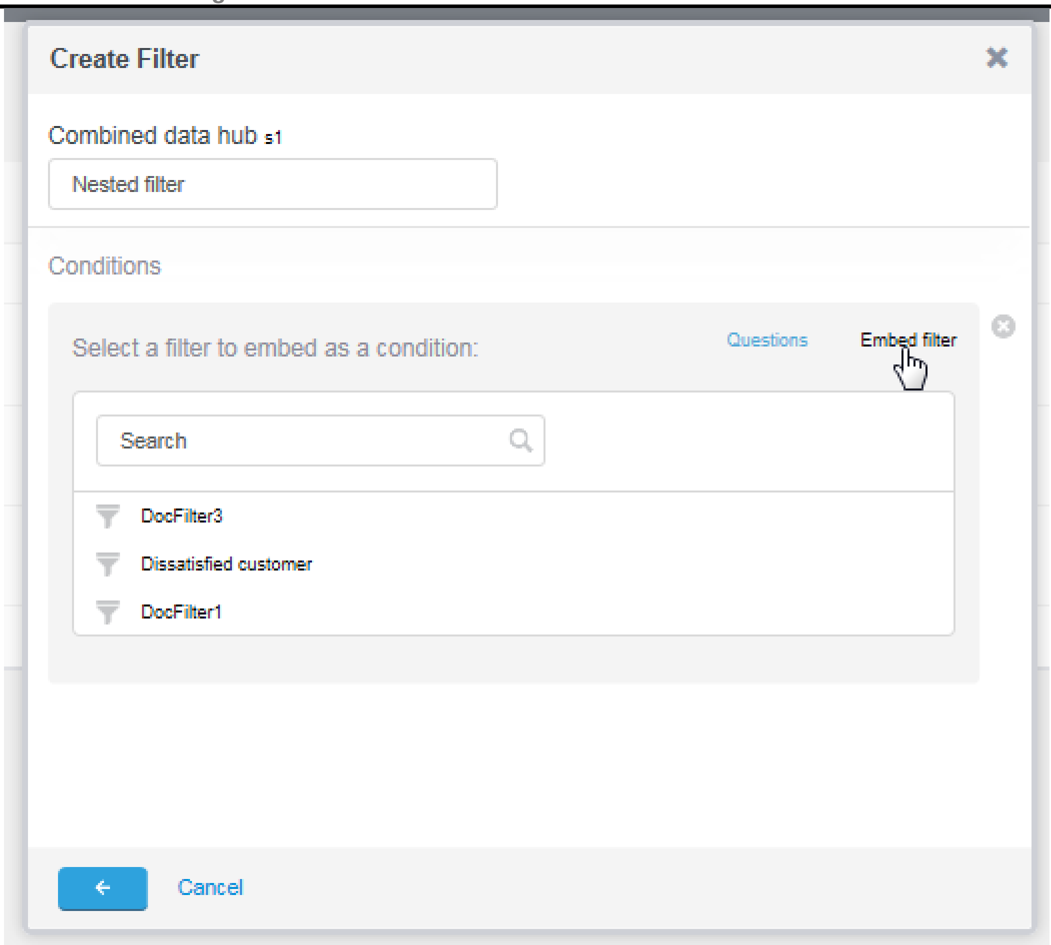


Figure 28 The list of available filters

The selected filter is added to the top-level filter.

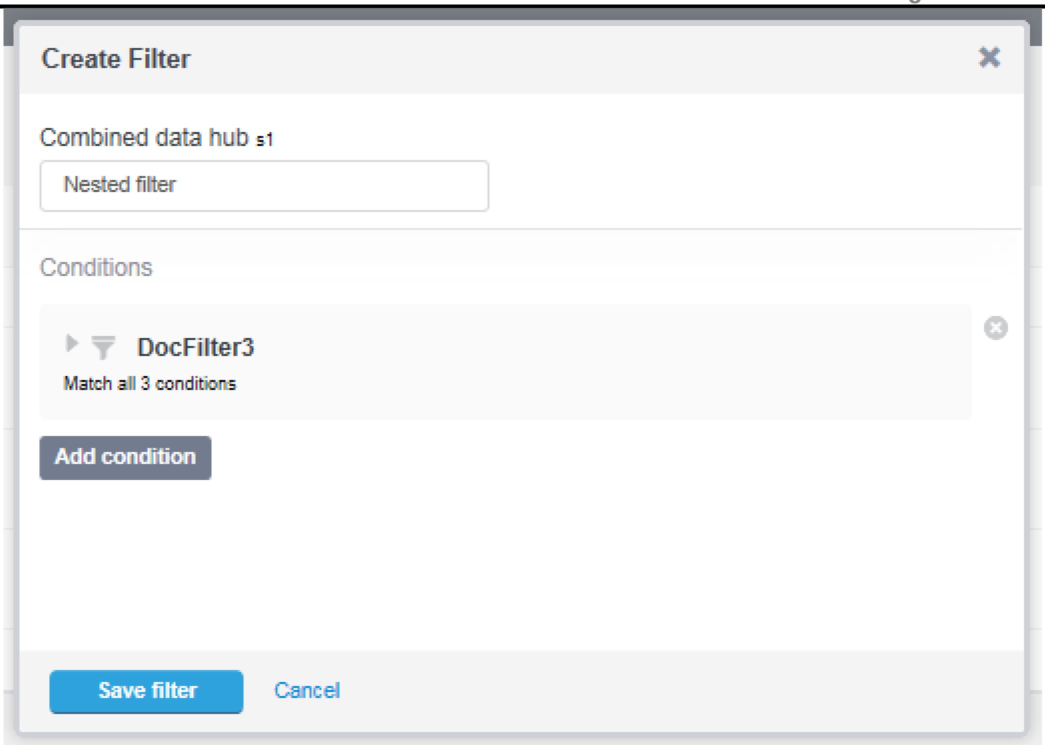


Figure 29 The selected filter embedded within the top-level filter

To expand and view the conditions set for the nested filter, click the filter icon. Note that you cannot change the conditions for the nested filter here; to change them you must open that filter for editing in the Filters page.

4. Add additional conditions if required.
5. On completion, click **Save filter**.

   The nested filter is added to your list of filters.

3.7. Triggers

A trigger pulls all of the setup elements that you have been working on (data fields, roles, workflows, filters etc.) and gathers them into one spot. The trigger will tell the system the following:

1. When to create a case (Filters).
2. What to name the case.
3. Which Data Fields you want to use and where to get the information to populate them.
4. Which workflow to use for the case.
5. Who to assign the case to.

3.7.1. How to Create a Trigger

1. In the **Action Management Setup** menu click **Triggers**, or go to the **Setup** menu and select **Triggers**.

   The Triggers page opens. This page lists all the triggers currently available to you.

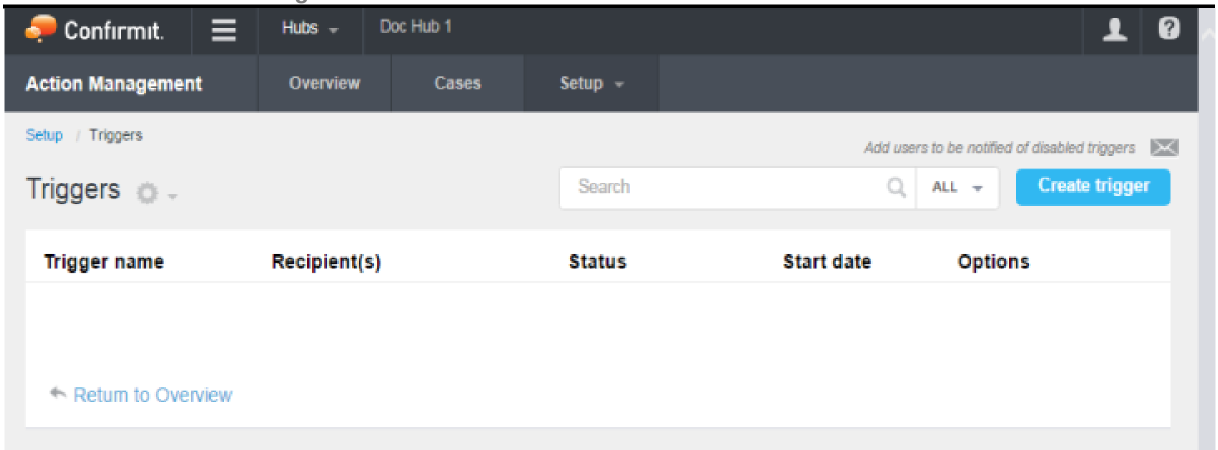


Figure 30 The Triggers page

2. Click **Create trigger**.

   The Create trigger page opens.

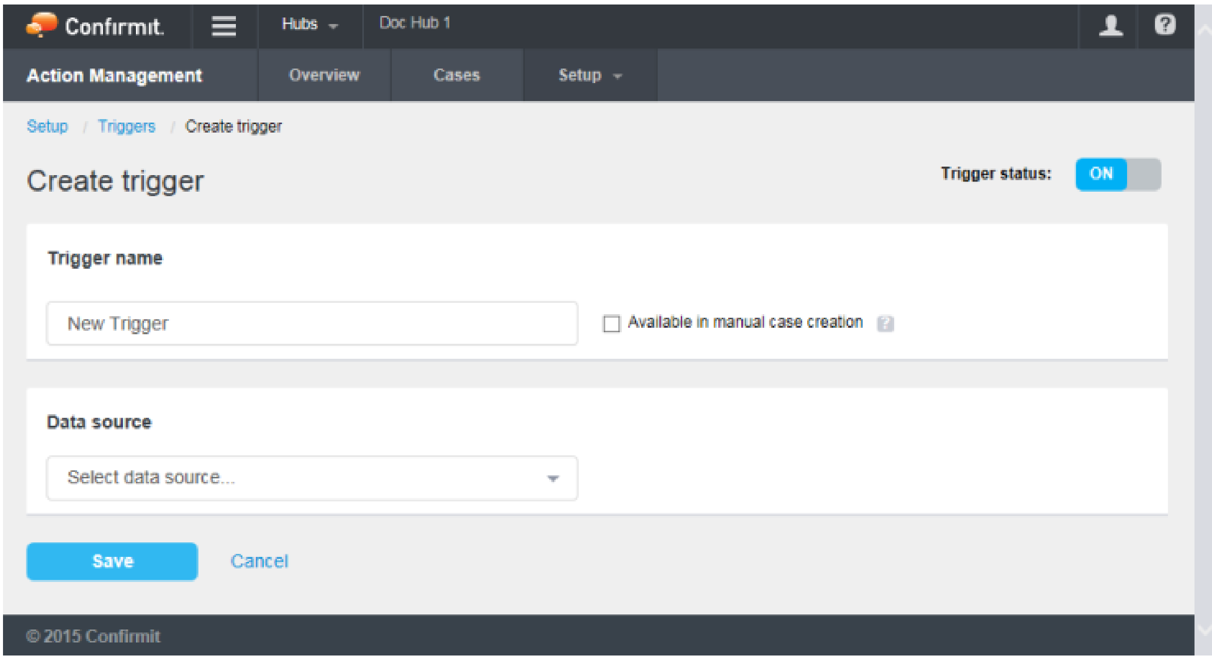


Figure 31 The Create trigger page

3. Type a name for the new trigger into the Trigger name field.
4. Select the data source to be used.

   A number of additional settings become available.

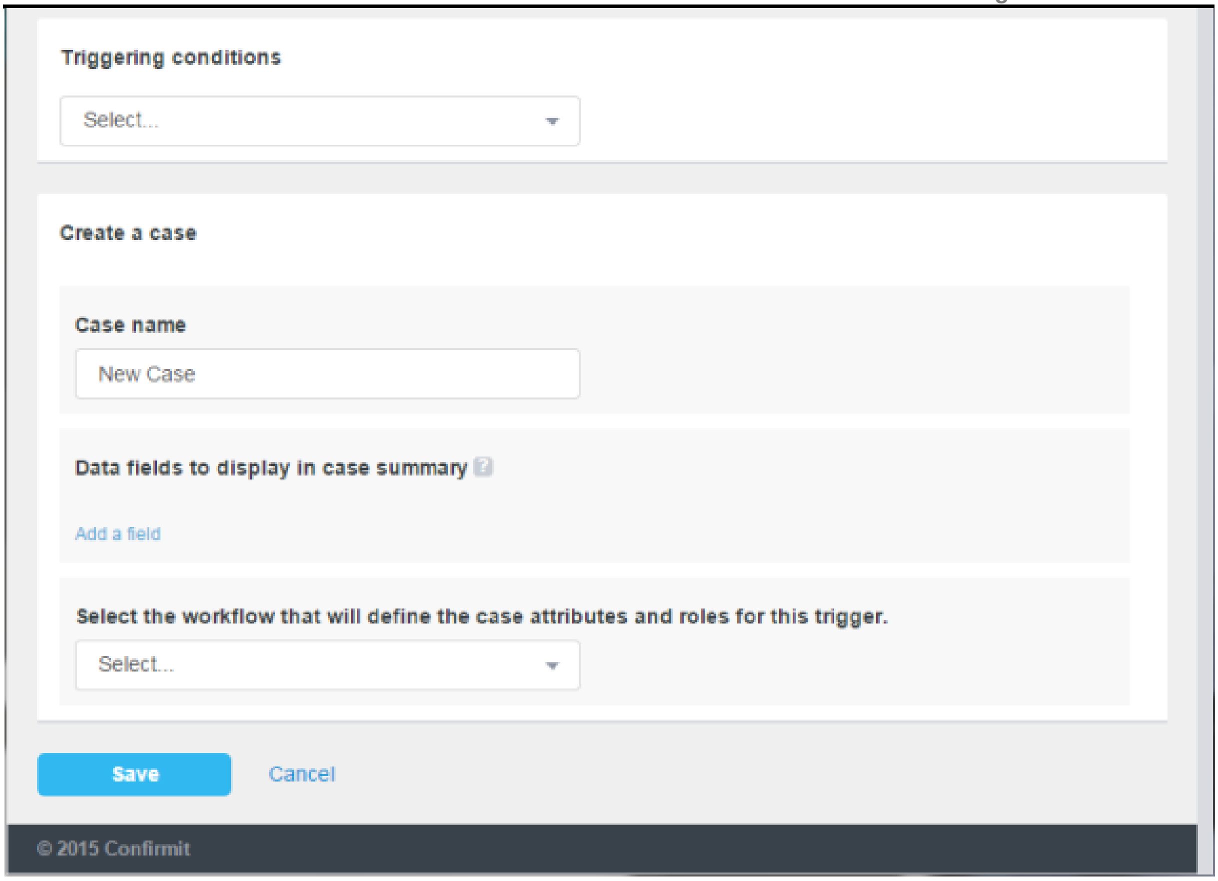


Figure 32 The additional properties

5. In Triggering conditions, select the filter you wish to use.
6. In the Case name field, type a logical name for the case that will be created.
7. Define your data fields and map them to questions in your survey.
8. Select the workflow that is to be used.
9. Add users to the Roles relevant to this workflow.

   Note that rather than assigning named individuals, you can assign users to roles based on background variables using the Auto-assign functionality (see Auto Assignment on page 33 for more information).

Note: There is no maximum limit to the number of users that can be assigned to a case, however it is recommended that you keep the number as small as possible. Experience shows that the more people assigned to a case, the more responsibility is spread and no one takes ownership.

10. The Trigger status switch (in the upper-right corner of the page) activates and deactivates the trigger. If set to **On**, then any data that arrives in the selected data source will be checked against the filter, and if it meets the filter criteria then a case is created. Set the Trigger status switch to **On** or **Off** as currently required for this trigger (you can change this at any time).
11. You can also check the "Available in manual case creation" box beside the trigger name towards the top of the page to allow users with adequate permissions (see End User Permissions on page 36 for more information) to manually create cases from reporting.
12. Save the trigger.

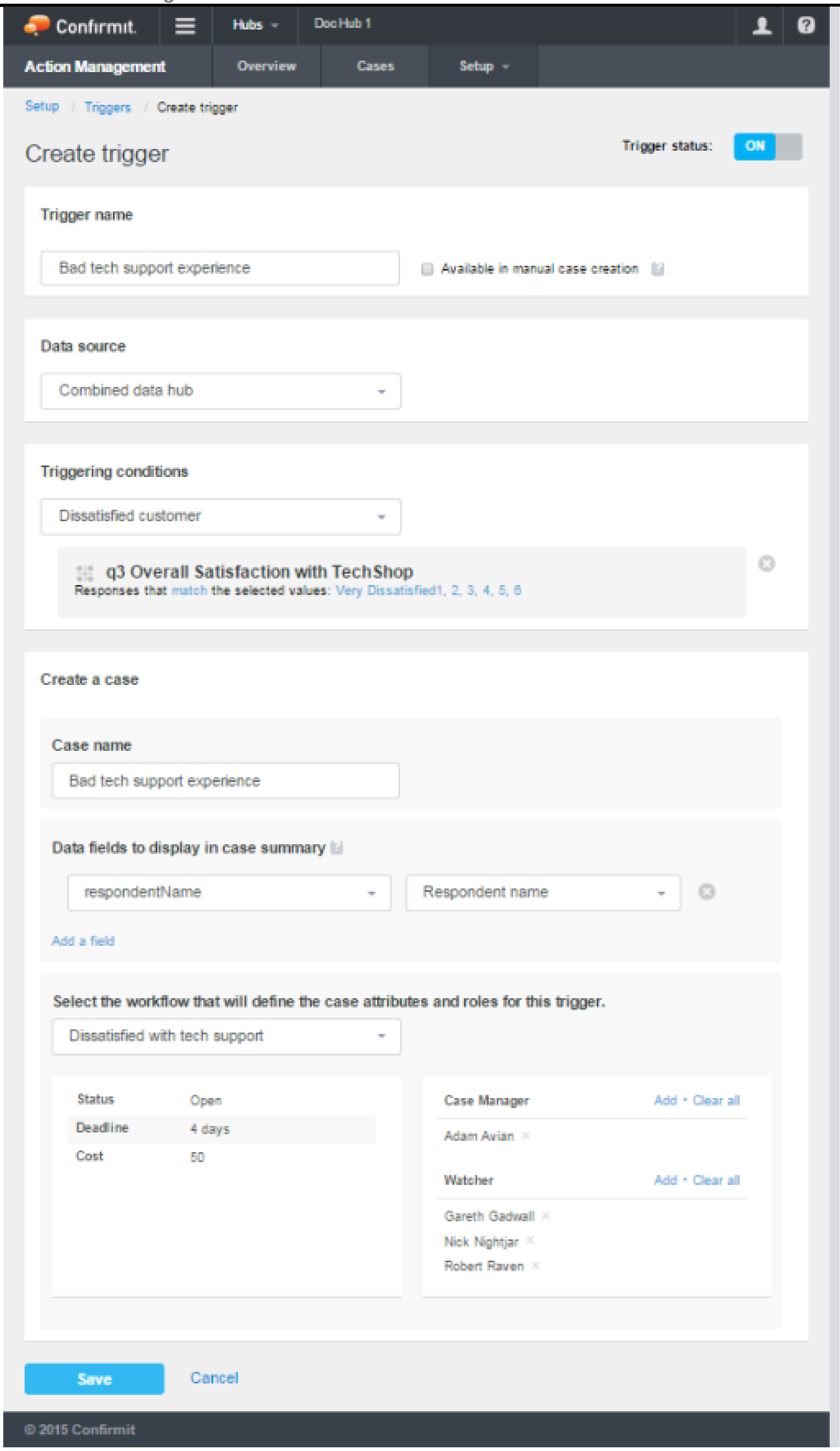


Figure 33 Example of a completed trigger

You are returned to the Triggers list.

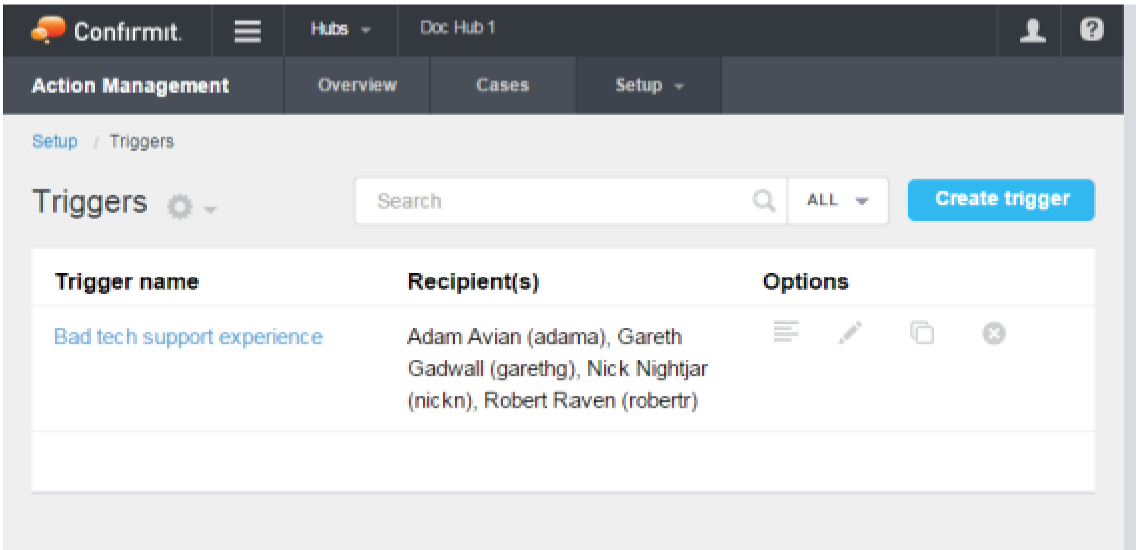


Figure 34 The Triggers list with the new trigger

3.7.2. Auto Assignment

Auto Assignment allows you to use a background variable or question rather than a specific person. This allows you to seriously reduce the number of Triggers (and therefore Filters) you will need to assign cases to the correct users. However, keep in mind that you need to be able to provide that user name in a background variable or question for this to work.

1. On the Edit Trigger page, when you are selecting for example the Case manager, click **Add**.

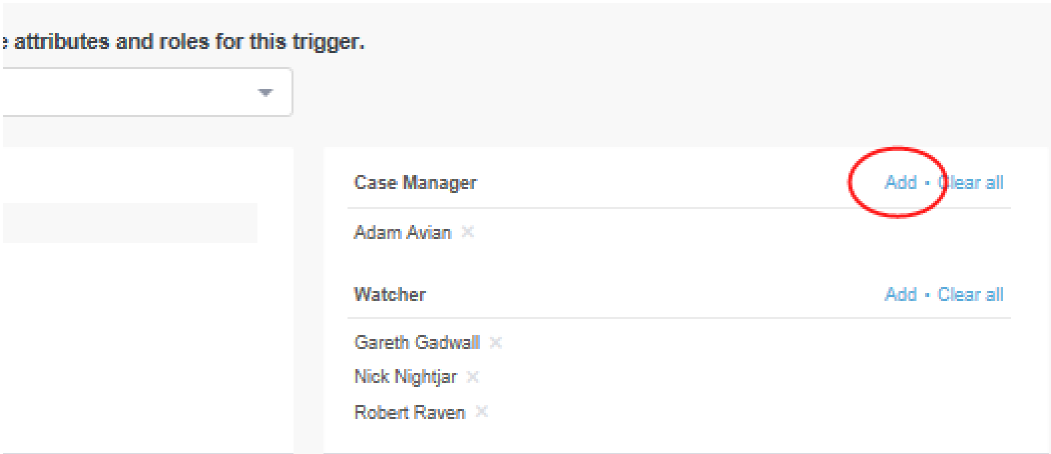


Figure 35 Adding a user to the trigger

The Add Users to Case Manager Role page opens.

2. Go to the Auto assignment tab.

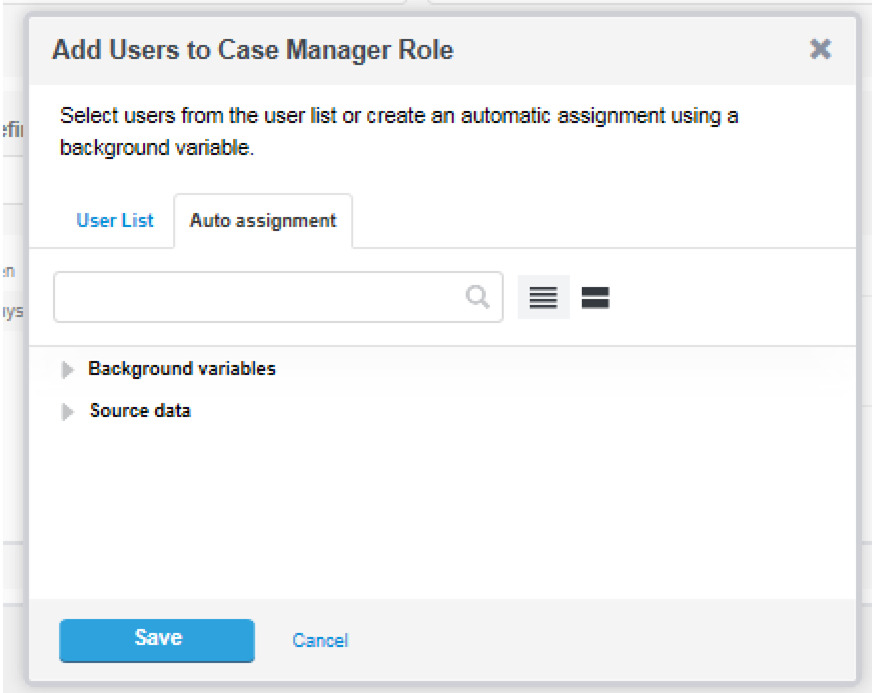


Figure 36 The Auto assignment tab

3. Open the Background variables drop-down.

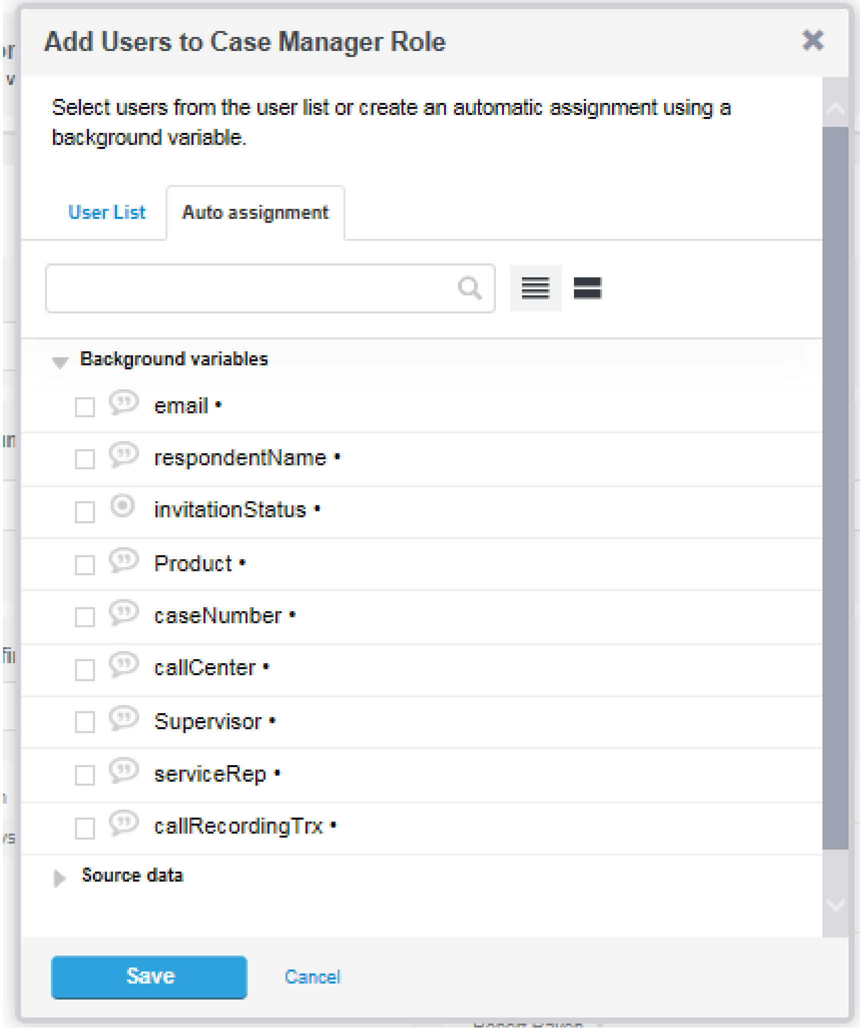


Figure 37 Example of the Background variables drop-down

This lists the Single and Open text background variables available in the data source. When the system is creating the case, it will check the value of that variable and see if it can find a match on your End User List. If a match is found, the case will be assigned to that user.

4. Select the required variable and click **Save**.

   If you have selected Auto Assignment and have not selected any specific users alongside them, you will be prompted to select a backup user. If for any reason Auto Assignment cannot find a match within the End User List, the backup user will be assigned to the case, ensuring you always have someone assigned in case of a data mismatch.

0.0.1. Setting a starting date in the past for an active trigger

Whenever you need to move the start date of the already started trigger to the past, you should do the following.

Changing the start date of the already started trigger to some date in the past

1. Open the required trigger for viewing/editing. In the Action Management Setup menu click Triggers, or go to the Setup menu and select Triggers. Turn off the required trigger using the On/Off slider switch in the upper right corner.
2. Go to the Overview page and choose the Trigger Monitor Service link. This will display the trigger settings.
3. In the trigger settings choose the Update button for the "Last response processed at" setting. This will display the Date modal pop-up. Enter the date into the field, or use the calendar control to select a date.
4. Again, in the Action Management Setup menu click Triggers, or go to the Setup menu and select Triggers. 5. Turn on the required trigger. This will display the "Trigger status" modal window. Choose the “starting from last processed date” in "Resume trigger processing".

This procedure sets the date of the last edited response to the date you have entered (the required date in the past). Upon restart the updated trigger will allow creating cases “starting from processed date”, meaning this is the date in the past you have selected.

3.8. End User Permissions

You can grant or deny permissions to an individual user, and you can grant permissions to an entire group of users. Refer to the Authoring User Guide for information on setting up end user lists and groups.

Note: If you add end users to a group that has already been granted permissions within Action Management, the new end users will automatically be granted all the permissions for the group.

If a user is added to a group in Authoring that has Action Management permissions, then that user will automatically be granted all the Action Management permissions of that group; you will not have to access Action Management to allocate permissions separately.

1. Go to the **Setup > Permissions** menu item.

   The End User Permissions page opens at the Groups and Users tab.

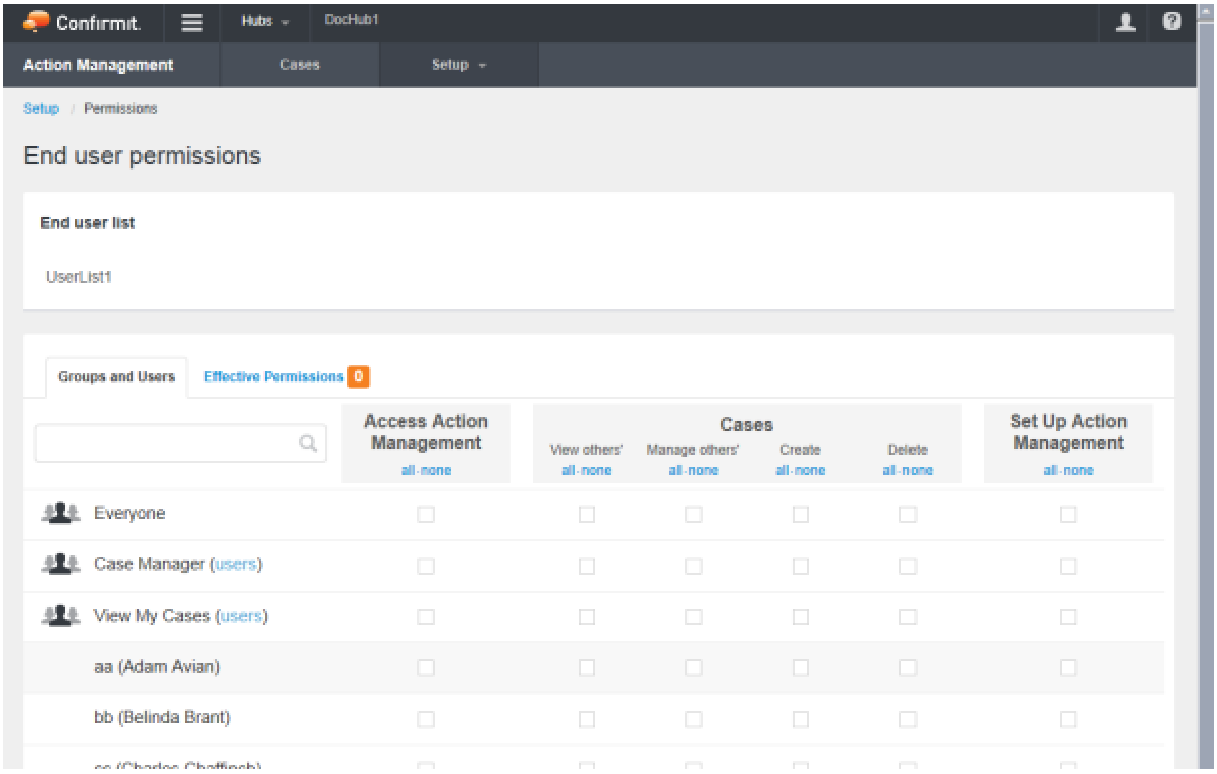


Figure 38 The End User Permissions page

   This page lists the groups and the individual end users so you can set specific permissions for each.

2. Check the boxes as appropriate for the various groups and end users, then save and confirm the changes.

The permissions are as follows:

- **Access Action Management -** provides access to Action Management. Without this permission enabled, the Action Management panel on the End User Portal will not display and the link to Action Management in the End User Portal global navigation will take users to a screen that says they do not have access. Users with this permission and no other permissions will have access to the Cases list and will see cases to which they are assigned in any role. They will be able to go to the Manage Case screen for their cases and make edits except changing the workflow (this function is tied to the Set up Action Management permission).

- **View Others' -** gives the user access to view all cases within your action management program. On the Cases list screen, the logged-in user will see cases to which they are assigned in any role, and also all other users' cases. Cases to which the logged-in user is assigned will allow editing (have the pencil icon for managing the case). Cases to which the user is not assigned will be available as view only (have the eyeball icon instead of the pencil icon). For cases that are view only, on the Manage Case screen, the user will be able to view all attributes, assignments, and notes but will not be allowed to edit anything.
- **Manage Others' -** provides access to all cases in the system. On the Cases list screen, all cases will have the pencil icon and will allow editing on the Manage Case screen. (Note that to change a workflow on the Manage Case screen the Set Up Action Management permission is required.) This permission will also act to bypass any workflow rules that are in place for a case. Be judicious with granting this permission, as even if they are not assigned to a case they will be able to make changes to it.

Note: Anyone with this permission is not bound by the List Item Rules set up in your workflow.

- **Create -** if you have Active Dashboards or a custom report that is set up to create cases, only end users with this permission will be able to create a case from those modules.
- **Delete -** allows users to delete cases on the Cases list screen. Note that the user may only delete his/her own cases unless he/she also has the Manage others' permission enabled. Be very careful with granting this permission. Mistakes can be made, and the wrong case can be deleted. Make sure your end users are trained in the proper protocol for deleting cases as for example you do not want a Case Manager to mistakenly believe they are supposed to delete a case after it is closed!
- **Set Up Action Management -** this is the all-access pass. These users will be able to edit lists, workflows, roles, permissions, and do anything they want on the Manage Case screen for any case. Entrust this permission only to those that are charged with the maintenance of the action management program itself.

Note: The Set Up Action Management permission also provides one additional right - the ability to change a workflow associated with a case after that case has been created. If a case is created but assigned the wrong workflow, only someone with this permission may change it.

Once some permissions have been allocated to users, the Effective Permissions icon indicates how many users have permissions. Go to the Effective Permissions tab to view the details.

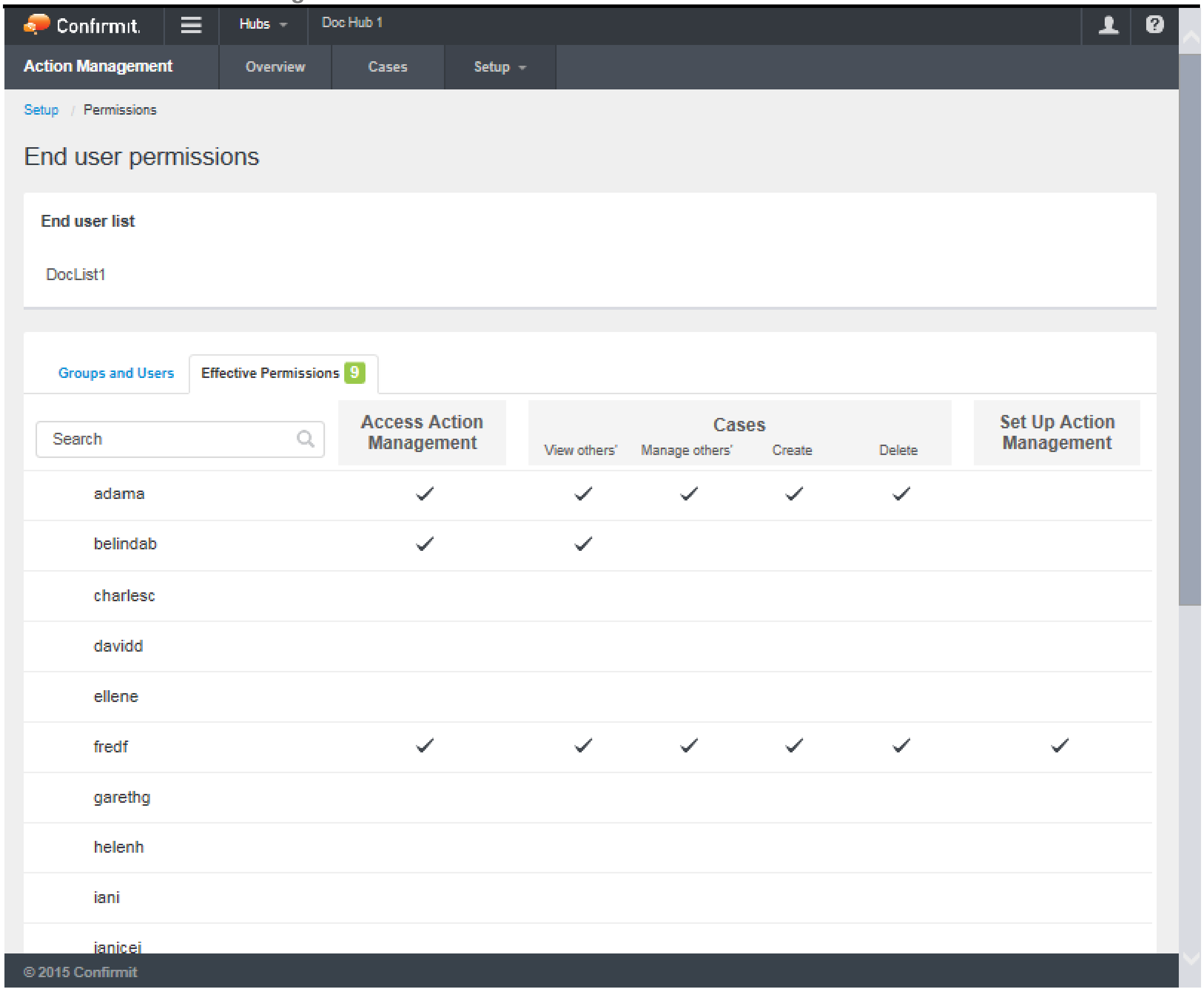


Figure 39 Example of the Effective Permissions tab

3.9. Language Localization

You can translate the Action Management interface into any local language for your users. When a user logs in, Action Management detects the user's language based on the language setting in Horizons Authoring and displays the Action Management labels in that language.

1. Go to the **Setup > Languages** menu item.

   The Language Localization page opens.

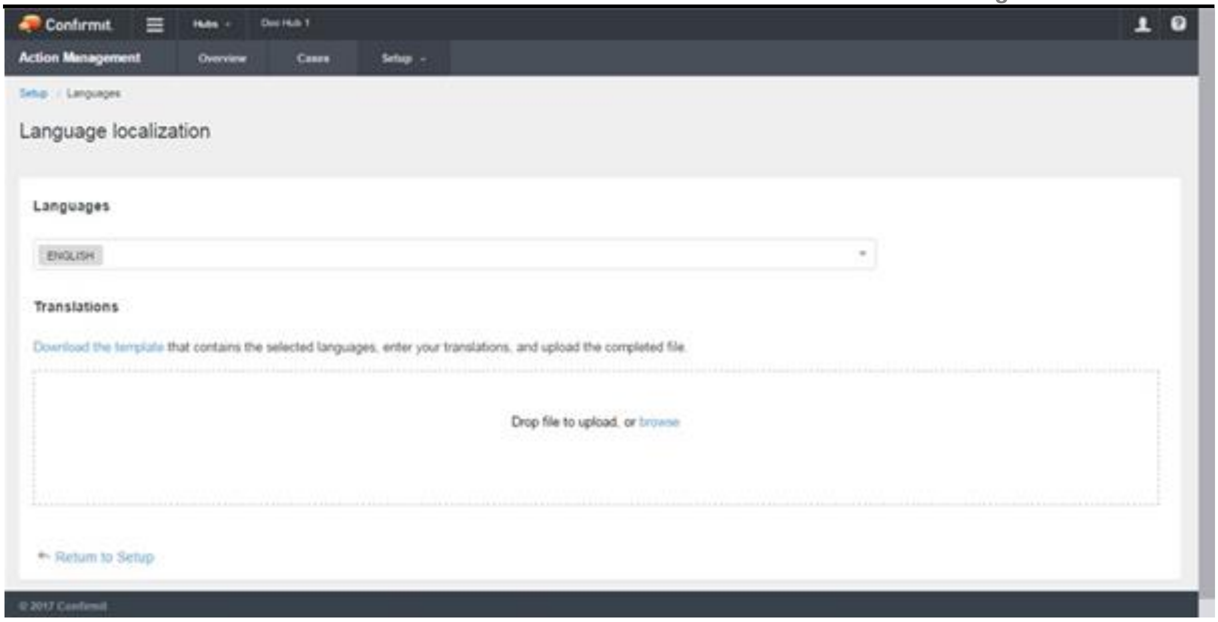


Figure 40 The Language localization page

2. Click into the upper **Languages** field.

   A drop-down list of languages opens.

3. You can type the first few letters of the language name to jump to the language you wish to add, or scroll to the language, then click on it.

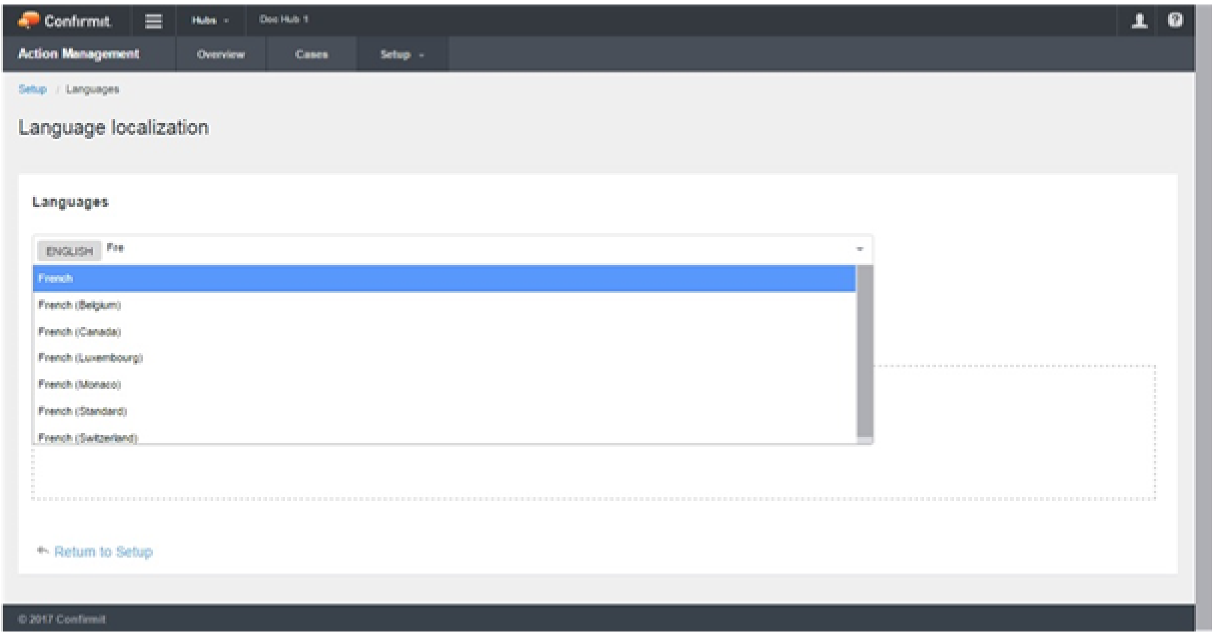


Figure 41 Selecting a language

The selected language is added to the field.

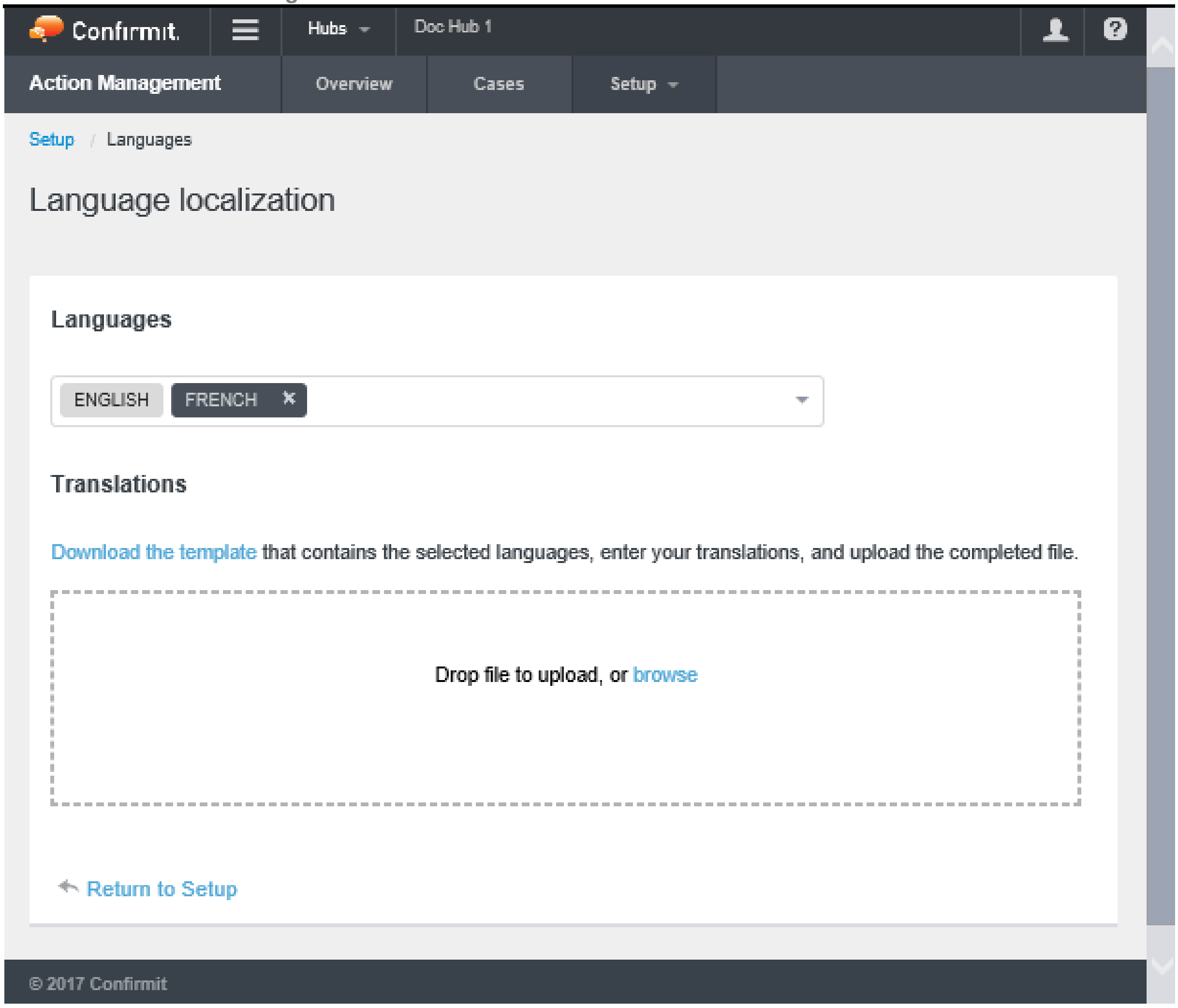


Figure 42 A language is added

4. Click on the blue Download the template link to download an Excel™ template. This contains all the standard Action Management labels as well as your program specific labels.
5. Follow the instructions in the Excel™ sheet and provide translations for all labels under the column heading for the selected language.
6. On completion, drag and drop the Excel file into the upload area.

   You have now provided translations for your Action Management program labels for the selected language. When a user logs in, Action Management detects the user's language based on the user's language setting in Horizon's Authoring, and displays the Action Management labels in that language.

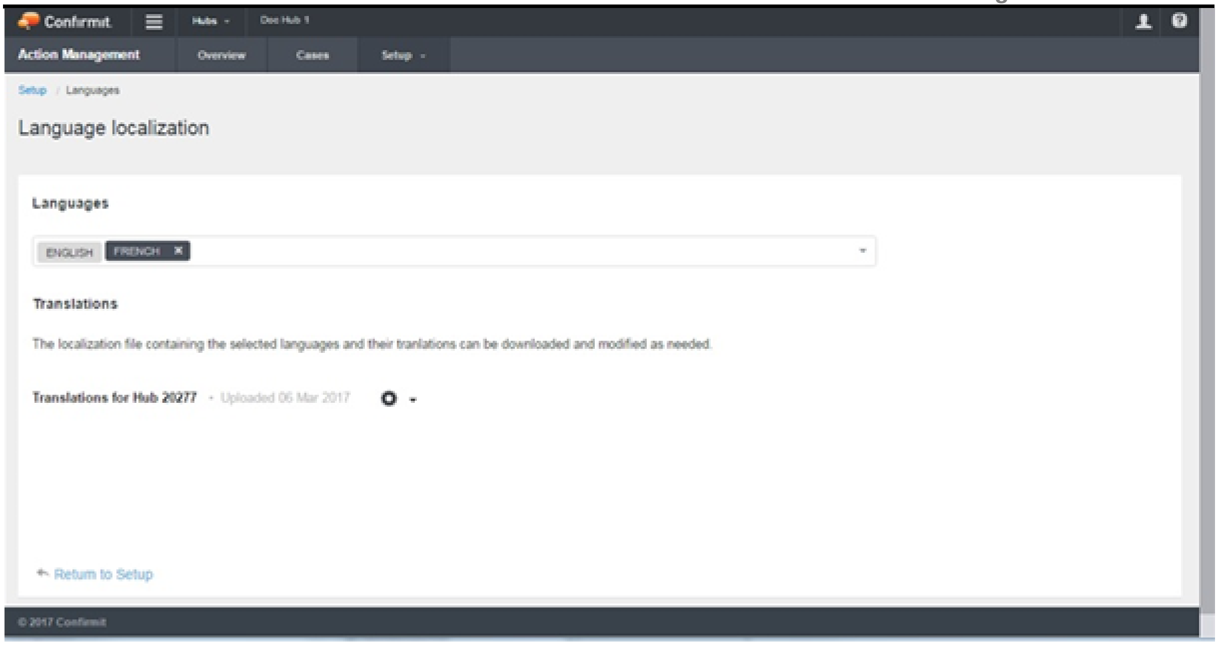


Figure 43 The translation file is added

If a translation is missing, an alert will be displayed. You can then download the file, correct it, and replace it, or you may decide to delete the translation.

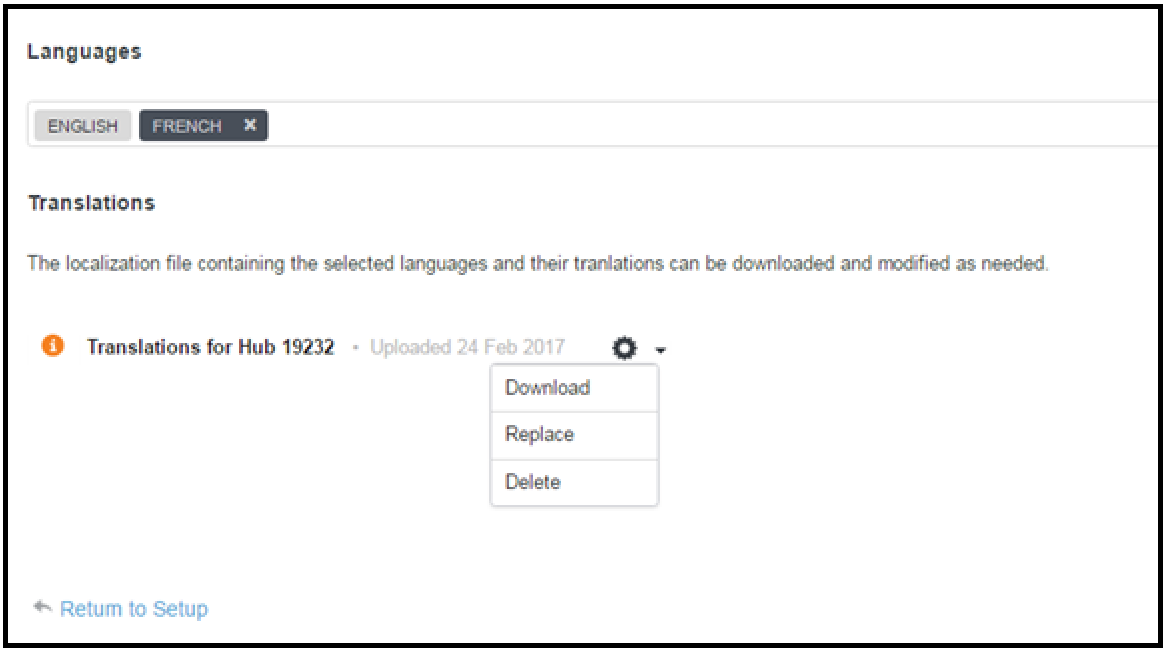


Figure 44 Updating or deleting a language localization

4. Seeing your AM Program from the Users' Perspective

Once you have defined all of the setup elements, it is time to consider (and test) what the users will see when they log in to Action Management.

4.1. The Cases Page

The Cases page displays all of the existing cases in your program. Note that the end users will only be able to see cases for which they have permission, whereas you as a professional user will be able to see all cases.

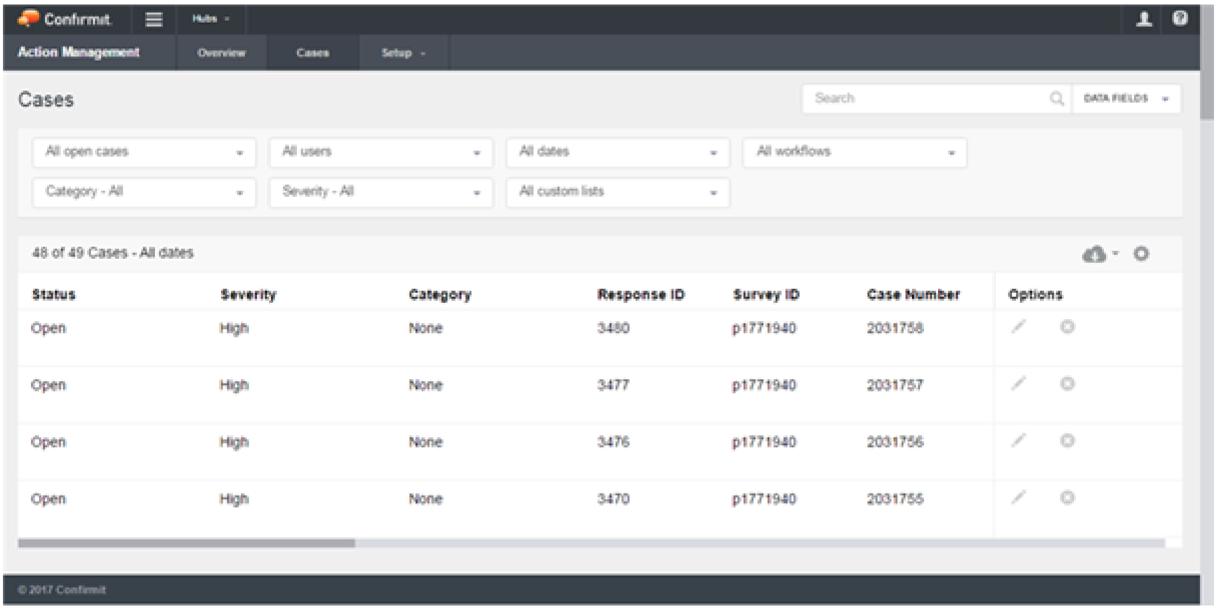


Figure 45 Example of the Cases page

4.1.1. Adjusting the Column Settings

The Cases page displays the list of cases. Some of the column information displayed here may not be relevant or useful to your users. To change the columns that are displayed, and the order in which they are displayed, click the gear icon in the upper-right part of the screen; the Case List Column Settings page opens.

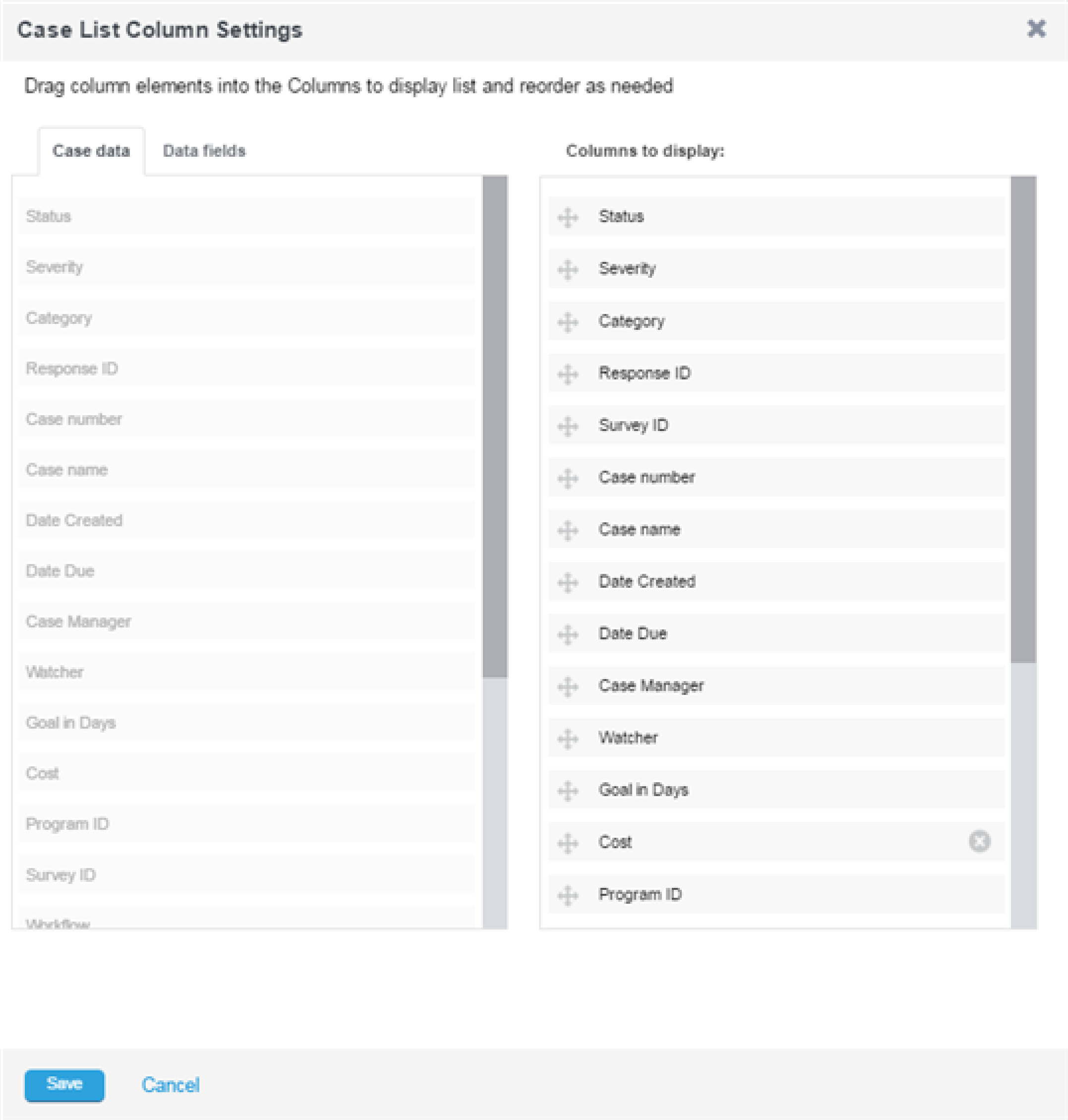


Figure 46 The Case List Column Settings page

The right column lists the available fields currently displayed on the cases page. To change the position of an item, drag the cross icon for that item to the desired position.

If you do not want a field displayed to the users, move your mouse pointer over the field and click the **X** icon for that item. The field will be removed from the right column and the corresponding item in the left column will become available. If you deleted a field in error, click the field in the left column and drag it back to the right column. You can add fields from the Case Data and the Data Fields tabs.

Note: Only professional users and end users with “Set Up Action Management” permissions can make changes to the column display.

4.1.2. Exporting Cases

You can export the case list to Excel™, with or without the log.

1. Click the download icon in the upper-right corner of the Cases page to open the drop-down, then select the desired export.

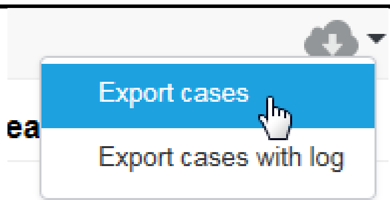


Figure 47 The Export drop-down

The resulting Excel file contains the first 500 cases in the case list. In the event your case list contains more than 500 cases, filter and sort the list so that the cases you wish to export are at the top of the list.

4.1.3. Using Case Filters

If you or your end users want to restrict the number of cases seen on the case listing page, use the filters at the top of the screen.

- Select Status to view all the cases with that status.
- Select a user's name to view all the cases assigned to that user.
- Select a Date range to view only the cases created within those dates.
- Select a Workflow to view all cases currently assigned that workflow.
- Select Category to view all the cases with that category.
- Select Severity to view all the cases with that severity.
- Select a Custom Field and a value to view all the cases which have that value for the selected custom field.

Click a column header to sort the list. An arrow appears beside the column header to indicate that the list is sorted by that column and the direction of the sort. Click the same column header again to reverse the sort direction.

4.1.4. Using the Search Feature

In the event a lot of cases are listed, if you know the name of the case you are interested in, type the name into the field in the upper-right corner of the Cases area. The list will be filtered as you type. You can also search by Case ID number, or by any of your Data Fields.

4.2. The Manage Case Page

When in the Cases page, click anywhere on a case row or on the **Options** icon for the case to open the Manage Case page for that case.

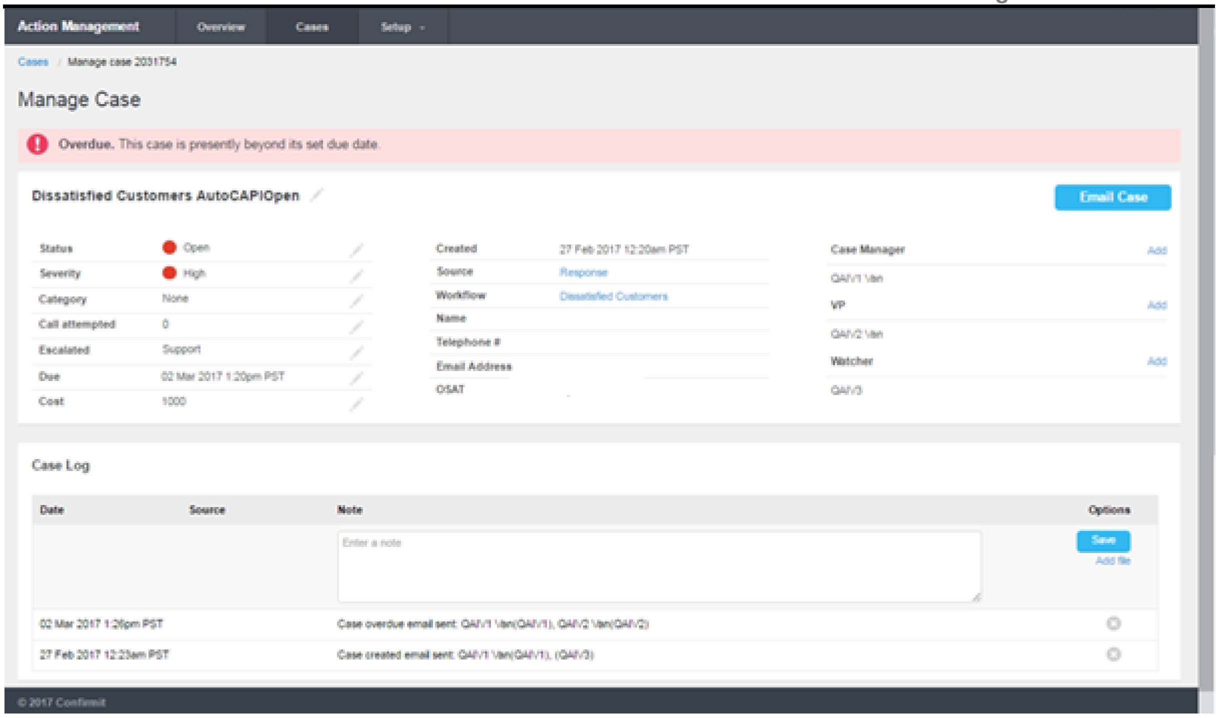


Figure 48 Example of the Manage Case page for a case

Here you can set the status, severity, category, and any other fields that are available for editing such as cost, and you can add or remove users for the Case Manager and Watched roles for the case.

Click the **Options** icon for each property to open a drop-down with the options available for that property, then select the desired option.

In the Case Log area you can add notes and attach files.

- To add a note, type your text into the Note field and click **Save**. Your note will be added to the list below the Note field, along with the date/time of the entry and your user name. If someone later modifies the note then the date and time of the modification are added after the note.
- To attach a file, click **Add file**. A file browser window opens; browse to and select the file you wish to attach to the case and click **Open**. The file is attached to the case.

To return to the Cases page click the blue **Cases** link in the breadcrumbs thread in the upper-left corner of the page or click the **Cases** button in the Action Management title bar.

4.2.1. Emailing the Case

If you have the required workflow permissions, you will be able to click the **Email Case** button, and can have up to three email options, including Send case, Email customer and Send reminder.

Once you have selected the type of email to be sent, use a template for the email. It is important to note that email templates must be set up in advance, or else you will not have any templates to select when using this feature. Additionally, all emails will have the “customize” option, which allows you to make changes to the email template before it is sent. Note that any changes made will not be saved to the template; they will only affect the particular email being sent.

- The **Send Case** option allows you to forward case information to other users or to an email address not associated with a user.

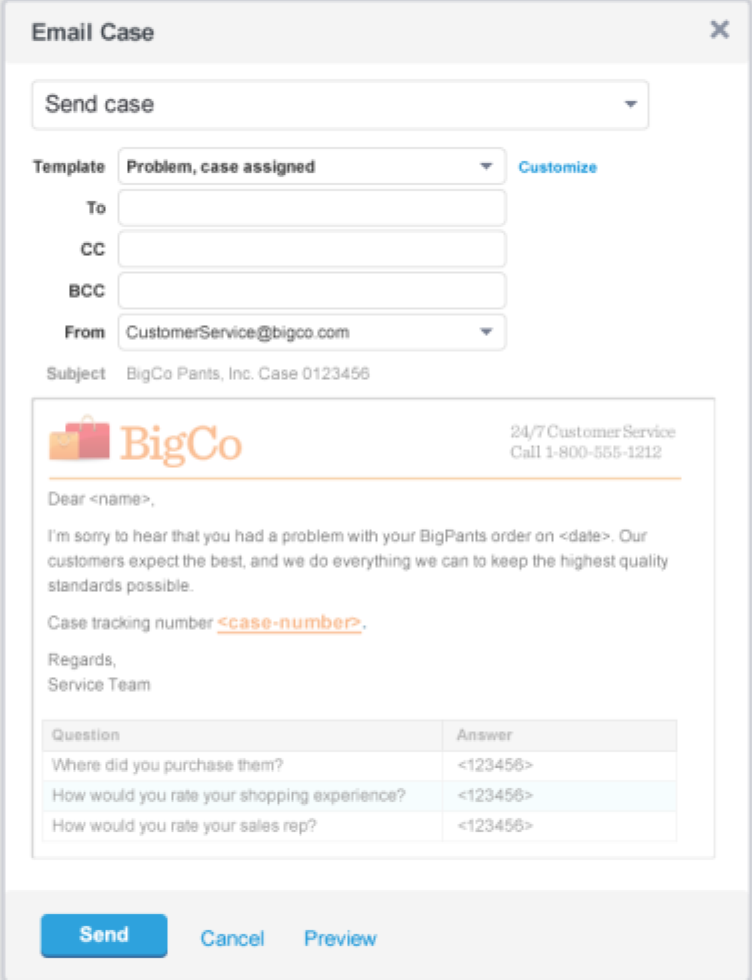


Figure 49 Example of the Send Case template

- The **Email Customer** option allows the user to send an email to the person who completed the survey.

Note: Emails can only be sent to email addresses in an "email" field of the survey. If there is no email field in the survey, or if the email field is blank for that response, the user will receive an error.

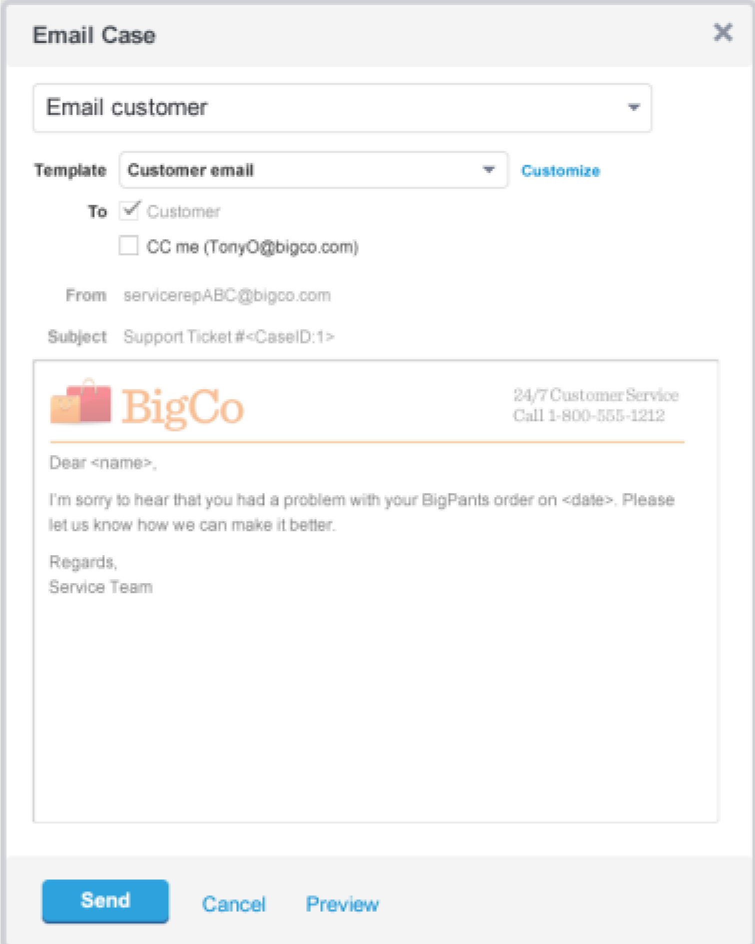


Figure 50 Example of the Email Customer template

- The **Send Reminder** option allows the user to send an email reminder to users assigned to the case.

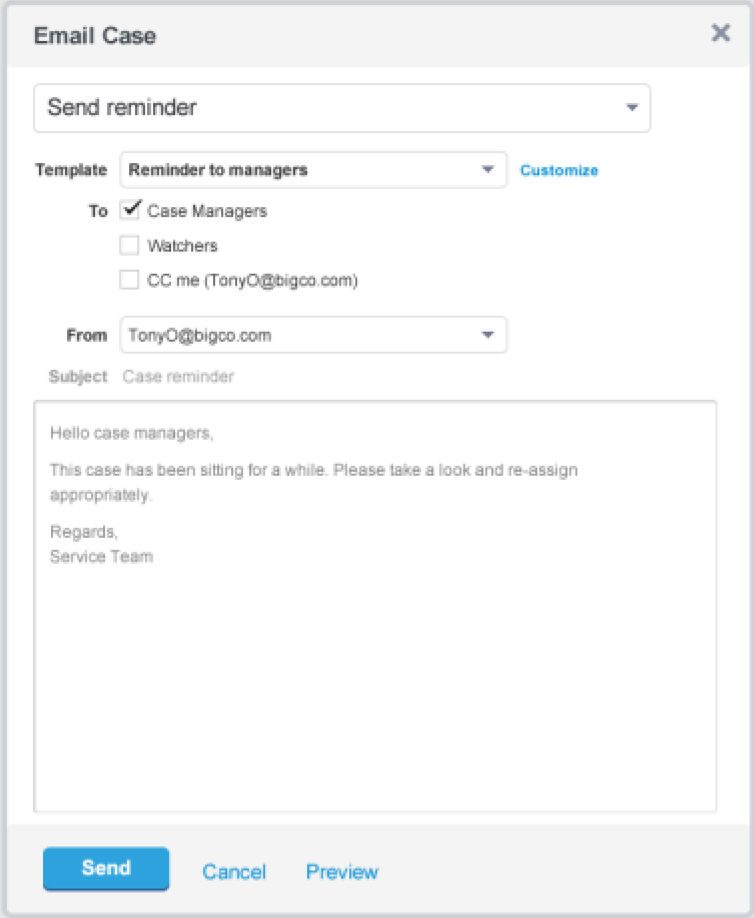


Figure 51 Example of the Send Reminder template

To return to the Cases page click the blue **Cases** link in the breadcrumbs thread in the upper-left corner of the page or click the **Cases** button in the Action Management title bar.

5. Appendix 1: Examples of Case Management

The following scenarios outline how a team of end users might respond to cases created in Action Management.

Note: The examples described are just that - examples. The actual processes your end users will follow depend on how you set up your program according to your client's needs.

5.1. Scenario 1 - Dealing with an Unhappy Customer

This is a simple example of how a case might be handled.

Chris receives the following email in his inbox:

Figure 52 Example of an email notification

Chris must now log in to the Confirmit End User portal to deal with the case. Once he accesses Action Management, he sees his list of cases:

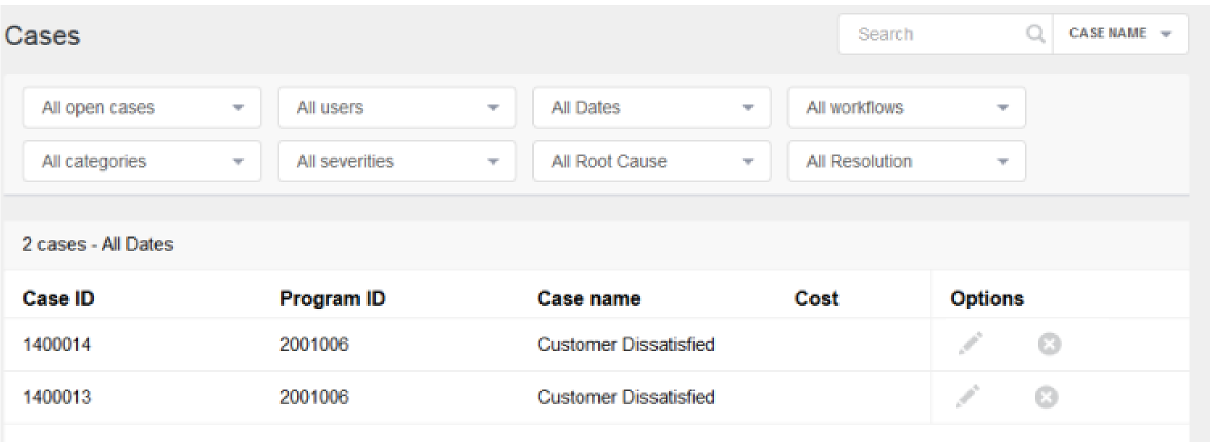


Figure 53 The list of cases

He sees the two cases he currently has assigned, and clicks the pen icon to edit the first one.

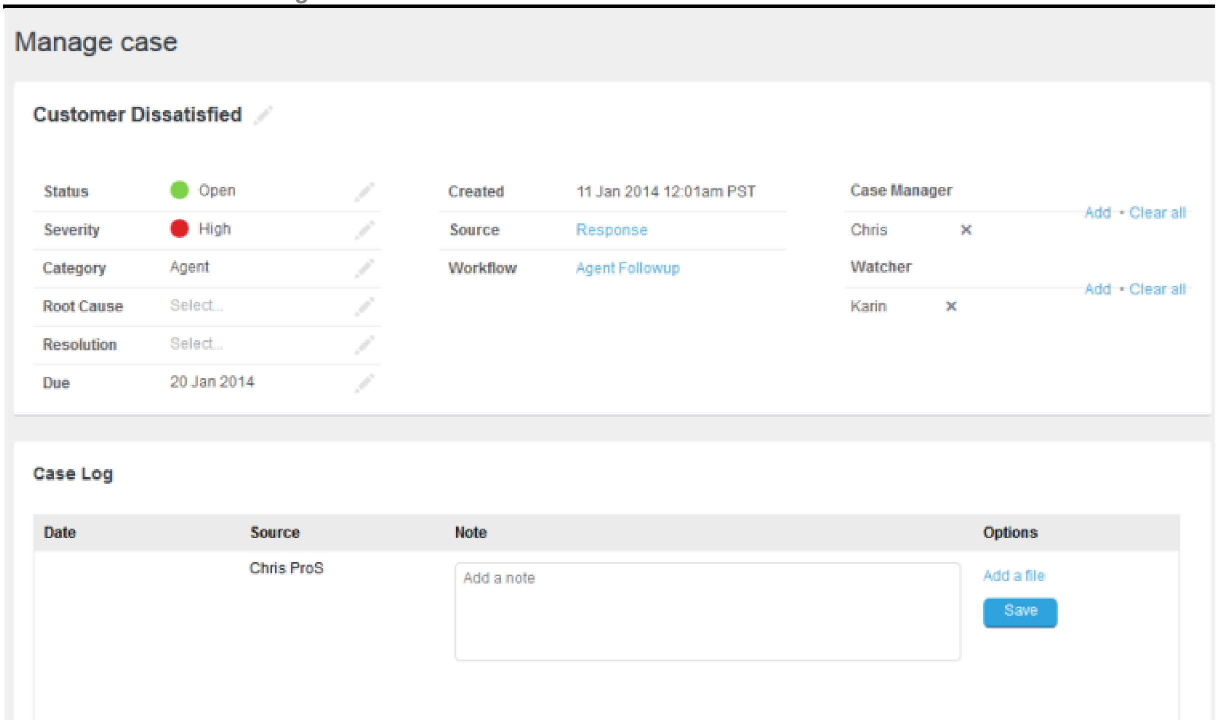


Figure 54 The Manage Case page

Chris can now see the case. He can click the **Response** link to see the survey response that triggered the case. If the customer's contact information is included, he can use that information to make contact. Once Chris has reviewed the information, he changes the Status to "Pending". This indicates that he has looked at the case and is now in the process of seeking a resolution.

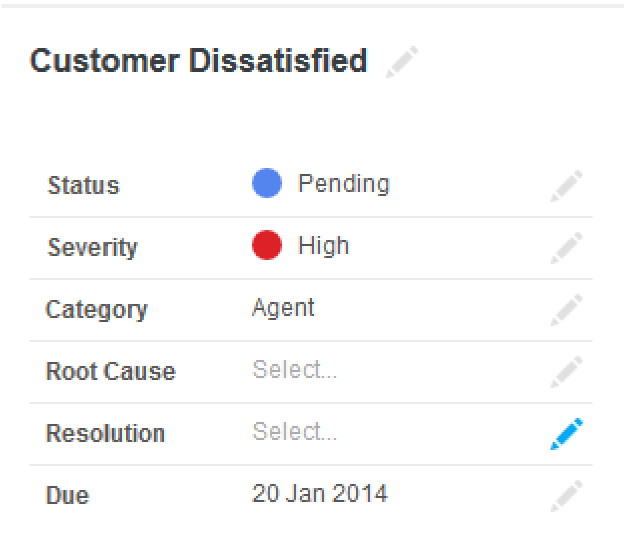


Figure 55 Setting the Status to Pending

Chris then contacts the customer to find out what happened. He keeps notes within the Manage Case screen.

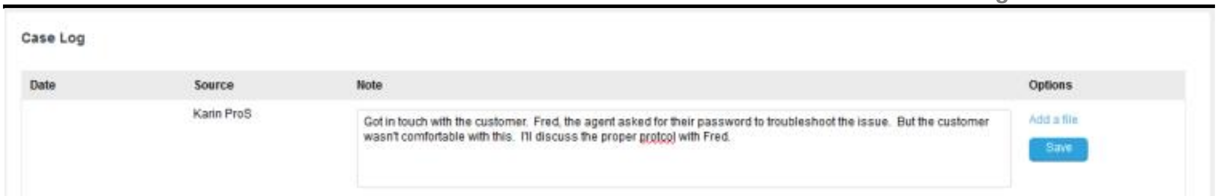


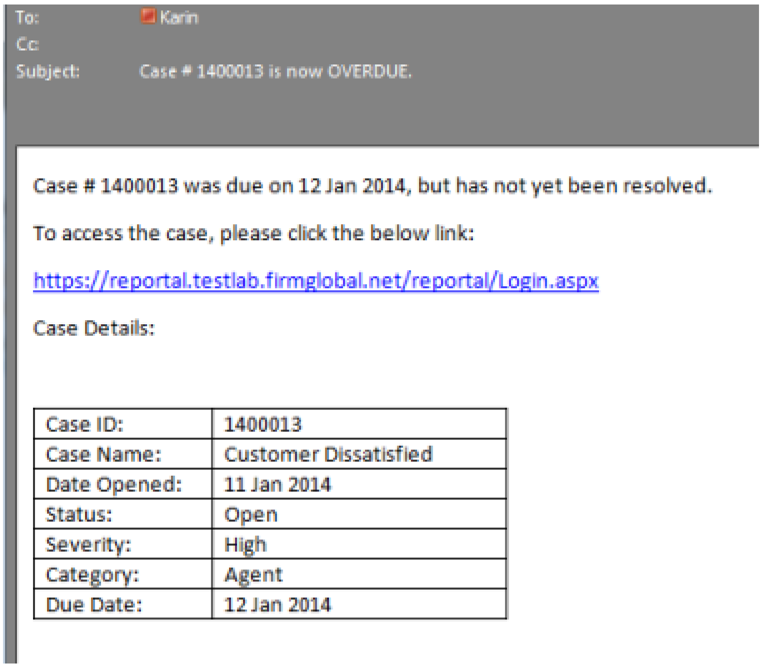
Figure 56 Adding notes to the Manage Case page

Once the issue has been resolved, Chris marks the Root Cause and Resolution fields and closes the case.

Figure 57 The case is closed

5.2. Scenario 2 - Overdue Cases

We have set up our "Watcher" role so that end users assigned in this position only receive notifications when cases go overdue. We will follow Karin as she receives a notification.


To: Karin
Cc:
Subject: Case # 1400013 is now OVERDUE.

Case # 1400013 was due on 12 Jan 2014, but has not yet been resolved.

To access the case, please click the below link:

https://reportal.testlab.firmglobal.net/reportal/Login.aspx

Case Details:

Case ID:	1400013
Case Name:	Customer Dissatisfied
Date Opened:	11 Jan 2014
Status:	Open
Severity:	High
Category:	Agent
Due Date:	12 Jan 2014

Figure 58 Example of an email notification

Karin receives the email in her inbox. She is VP of Customer Care and does not concern herself with the day-to-day managing of cases. But when a case goes overdue, she DOES get an email, so everyone knows their boss will be aware if they let things slip.

Karin clicks the link to go to the case:

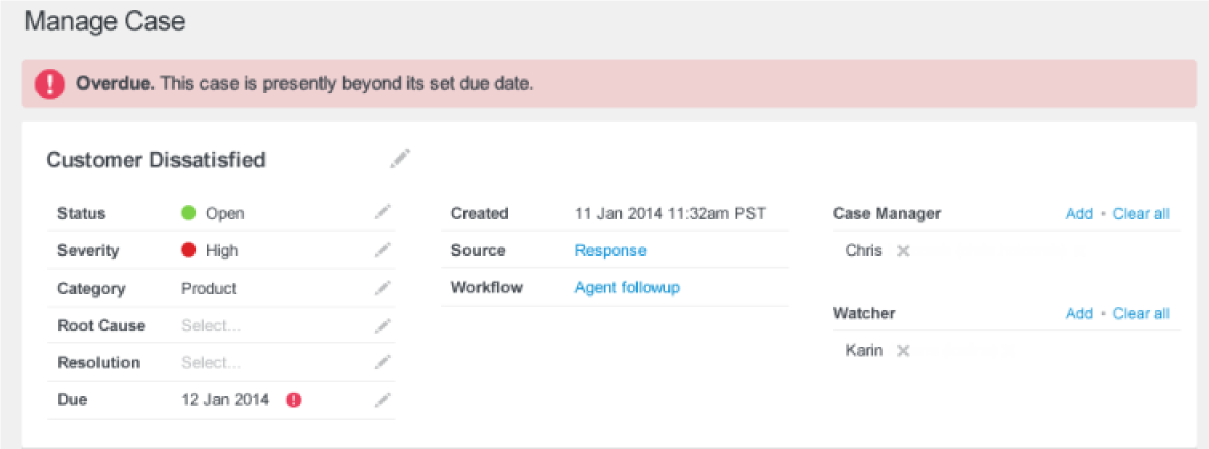


Figure 59 The Manage Case page

It seems the manager of the case is Chris, but the case needs to be handled by someone else.

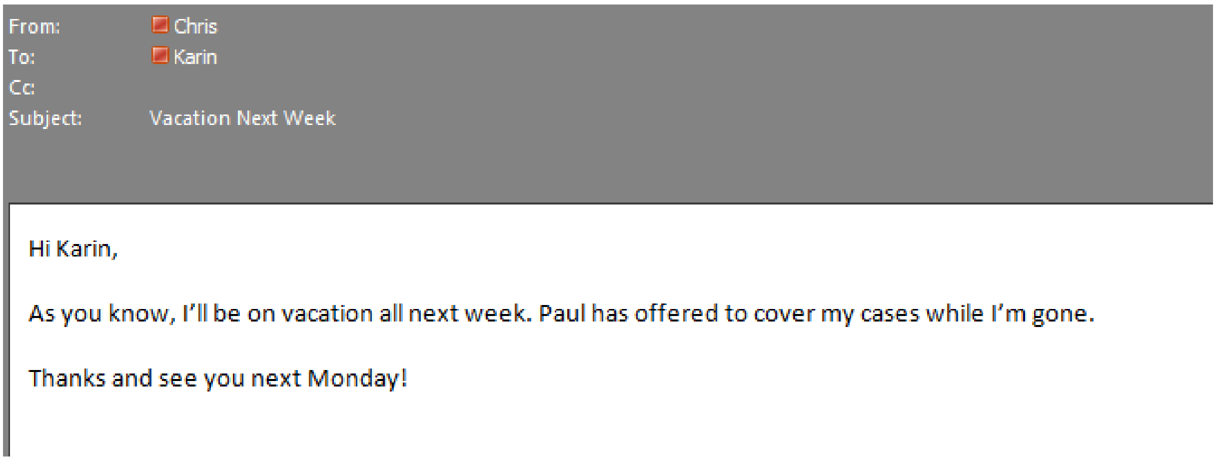


Figure 60 Chris can't take this case so it must be transferred to someone else

As we have empowered the "Watchers" of the case to assign users, Karin adds Paul to the list of Case Managers. She leaves Chris assigned as well, so he'll get email notifications too, and if he returns before the case is resolved he can take over again.

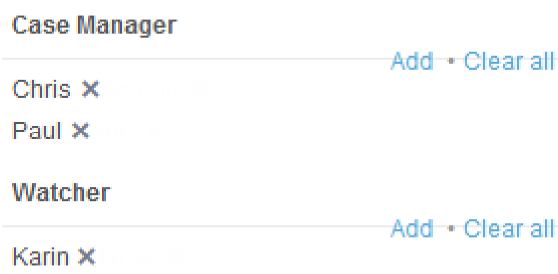


Figure 61 Adding Paul to the list of Case Managers

She also adjusts the due date so that Paul has time to solve the issue.

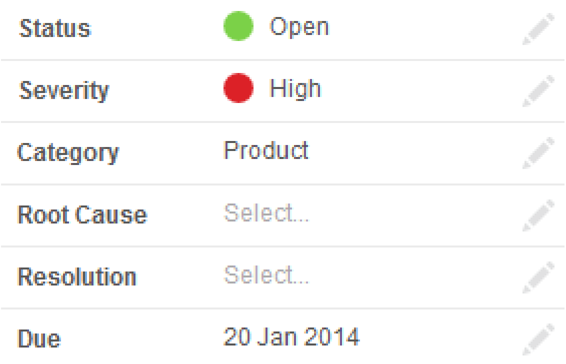


Figure 62 Changing the date due

At this point, she might send Paul an email (or just forward the one she got earlier) telling Paul he has a new case assigned.

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