

# Get Started with eCasework

Welcome to eCasework! This guide will show you how to get started. You'll be adding your first case in no time.



If at any point you get stuck, click this yellow button to speak directly with one of our support team. They'll be able to help guide you immediately.

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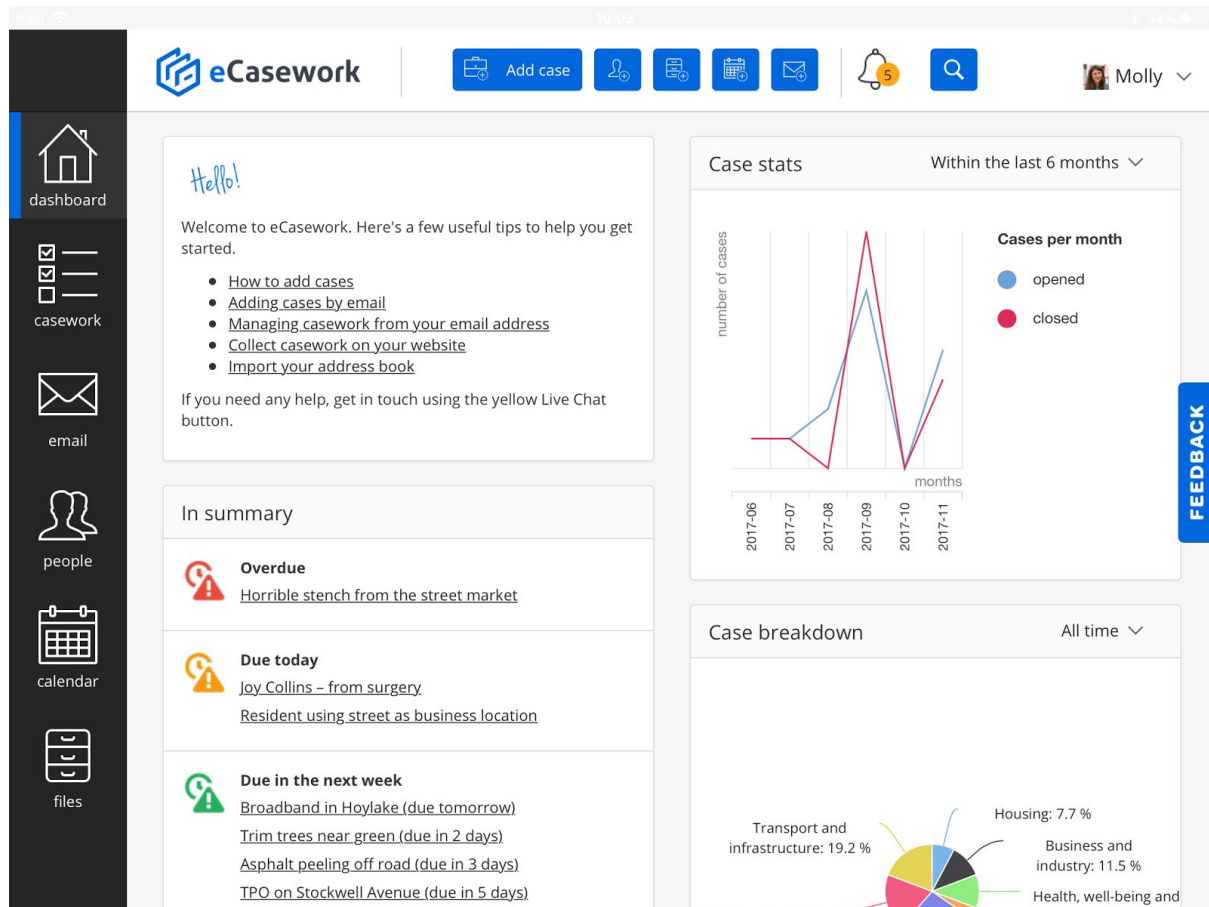
# Register

The easiest way to manage casework awaits, but first you need to get registered and logged in to the app.

1. Visit the registration page at <https://ecasework.com/account/newuser>
2. Enter your name and email address.
3. Choose the ward you represent.
4. Enter your phone number (optional) and we'll call to help you get set up.
5. It's free for the first 30 days, but choose whether you'd like to pay monthly or yearly. (You can change this later.)
6. Click 'Get started now'.
7. Open your email inbox and find the email we've sent. You may need to check your spam folder, but let us know if it doesn't arrive within 5 minutes.
8. Open the email from us and click 'Verify your email address' or the link.
9. You'll be asked to choose a password. Make sure it's at least 8 characters long, containing both letters and numbers. This makes it secure.
10. Click 'Set password'.
11. Choose an eCasework email address. We recommend `firstname.lastname` but be aware choices are permanent!

You're in! Now it's time to explore the app.

# Dashboard



This is the first thing you'll see when you log in to eCasework. The dashboard features an array of widgets designed to give you insight on your ward and your casework.

## In summary

Your casework 'at-a-glance' split by due date. Click a case title to see its details.

## Case stats

A graph showing the number of cases you've opened and closed recently. Click the drop-down to change the date period.

## Case breakdown

The different subjects covered by your casework. Useful for identifying recurrent problems.

Let's take a look at the other sections of the app – the black tabs with white icons.

# Casework

The screenshot displays the eCasework application interface. At the top, there's a header with the eCasework logo and a navigation bar with icons for 'Add case', user profile, calendar, mail, and search. A user profile 'Molly' is shown on the right. The left sidebar contains navigation icons for 'dashboard', 'casework', 'email', 'people', 'calendar', and 'files'. The main panel shows a list of cases under the heading 'View: All open cases'. The selected case is 'Resident using street as business location', which is 'Overdue' and assigned to 'you'. The case details include the due date '11/01/2018 19:00', assigned to 'John Griffith', case identifier 'TKRG5', and tags 'Business and industry', 'Public order, justice and rights', and 'Hoylake Road'. An associated contact 'Maude Horner' is listed with a red minus icon and an 'Add' button. The case description states: 'Case was opened by you on 31 May 17 at 13:18 and assigned to you. Due date was set as 06/06/2017 11:17. Constituent Maude Horner was associated with the case. Case was tagged with Hoylake Road, Business and industry, Public order, justice and rights.' A case update from 31 May 17 at 13:18 reports that Ms Horner's neighbour, Mr Cummings, is using the street for a car business, causing noise and oil leaks.

dashboard

casework

email

people

calendar

files

View: All open cases

Horrible stench from the street market  
**Overdue**, assigned to you

Joy Collins - from surgery  
Due today, assigned to you

**Resident using street as business location**  
Due today, assigned to John Griffith

Broadband in Hoylake  
Due tomorrow, assigned to you

Trim trees near green  
Due 13 January, assigned to you

Asphalt peeling off road  
Due 14 January, assigned to John Griffith

TPO on Stockwell Avenue  
Due 16 January, assigned to you

Pothole on Brixton Road  
Due 17 January, assigned to Roads and Highways

Case complete Update case Send email from case Attach file to case

**Resident using street as business location** Change

Due 11/01/2018 19:00

Assigned to John Griffith Change

Case identifier: TKRG5

Tags Business and industry, Public order, justice and rights, Hoylake Road Change

Associated contact: Maude Horner Add

23 Hoylake Road, WV6 7YS

Case was opened by you on 31 May 17 at 13:18 and assigned to you. Due date was set as 06/06/2017 11:17. Constituent Maude Horner was associated with the case. Case was tagged with Hoylake Road, Business and industry, Public order, justice and rights.

Case update by you on 31 May 17 at 13:18

Ms Horner has reported to me that her neighbour, Mr Cummings, is using the street they live on to run a car business. There are several cars lined up on the street daily and he can be seen working on them. Some of the cars are leaking oil onto the road.  
Is this legal? Can someone notify the police? What about the noise and disturbance from testing car engines?

FEEDBACK

This is where we expect you'll spend most of your time, the place where you'll record and complete all of your casework. The list on the left shows all of your cases, and clicking on a case will show its details.

We'll look at the Casework section in more detail later.

# Email

The screenshot shows the eCasework web interface. On the left is a dark sidebar with icons for dashboard, casework, email, people, calendar, and files. The 'email' icon is highlighted. The top header includes the eCasework logo, a navigation bar with 'Add case' and other icons, and a user profile 'Molly'. The main area is divided into an inbox list on the left and a detailed view of a selected email on the right. The selected email is from 'Joy Collins - from surgery' and contains text about a neighbor's health and safety. A 'FEEDBACK' button is visible on the right side of the email content area.

From	Date
Molly Richards	24th Nov
<b>Joy Collins - from surgery</b>	
Molly Richards, Benjamin ...	4th Oct
Horrible stench from street market [ec:...	
Molly Richards	22nd Sep
Fly-tipping on Regents Road AGAIN!!	
Molly Richards	22nd Sep
Damp in my house	
Malcolm Nicol (2)	20th Sep
RE: Pavement broken [ec:UKYU6]	
eCasework	20th Sep
Pothole [ec:C8PZB]	
Steven Messer	6th Jul
Brixton Road [ec:4DXMD]	
Steven Messer	16th Jun
NPS	
notifications@typeform.co...	8th Jun
Broadband in Hoylake	
Benjamin Asamoah	31st May
Horrible stench from the street market	

**Joy Collins - from surgery**

Email received from Molly Richards on 24 Nov, 2017 at 9:31 AM

This email is linked to a [case](#)

Joy mentioned that her neighbour hasn't been seen for a while and has been suffering from loss of mobility, and they care for her safety. They've not been able to make contact with her, although the parcels of food left for her have been taken. Worried for the lady's health.

**FEEDBACK**

- Picked up a case on your walk to the shops?
- Found a case while quickly sorting your council inbox?
- Want to accept casework over Twitter and see notifications?

Every eCasework account comes with its own email address, to help you sort the clutter of other inbox and provide a place dedicated to solving problems.

# People

The screenshot displays the 'People' tab in the eCasework application. The top navigation bar includes the eCasework logo, a list of icons for 'Add case', 'People', 'Cases', 'Calendar', 'Email', 'Notifications', and 'Search', and a user profile for 'Molly'. The left sidebar contains icons for 'dashboard', 'casework', 'email', 'people' (selected), 'calendar', and 'files'. The main content area is divided into three sections: a list of people, details for the selected person, and a map.

**View: All people** [dropdown arrow] [download icon]

**Benjamin Asamoah**  
Constituent

**Dipika Harries**  
Constituent

**Helen Messenger**  
Constituent

**Howard Messenger**  
Constituent

**John Griffith**  
Assistant

**Laura Dean**  
Constituent

**Maude Horner**  
Constituent

**Molly Richards**  
Councillor

**Paul Smith**  
Business Owner

**Paul Greenaway**  
Business Owner

**Benjamin Asamoah** Constituent

18 Manston Drive, Perton, WV6 7LP

bnjmnasamoah@gmail.com

**Contact history**

- Damp in house**  
Due 29 September, assigned to you
- Horrible stench from the street market**  
Overdue, assigned to you
- Stench from market street**  
Due 22 May, assigned to you
- Dangerous pot hole near pedestrian crossing**  
Due 28 July, assigned to you

**Map:** OpenStreetMap contributors. The map shows the location of Benjamin Asamoah at 18 Manston Drive, Perton, WV6 7LP. A red pin marks the location. A blue 'FEEDBACK' button is visible on the right side of the map.

Keep track of everyone you deal with on the People tab, from assistants to constituents and beyond. The list on the left shows each person, and you can quickly view their details, location and related cases on the right. Think of it as an advanced address book and you'll always be at your best when interacting with anyone.

# Calendar

10:07

100%

Add case

5

Molly ▾

dashboard

casework

email

people

calendar

files

Calendars

My cases

My events

<

>

today

01 — 31 Jan 2018

month

week

day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11 11:00 Joy Collins 19:00 Resident	12 00:00 Broadbar	13 00:00 Trim trees
14 00:00 Asphalt p	15	16 00:00 TPO on St	17 00:00 Pothole o	18	19	
21	22	23	24	25	26	
28	29	30	31	1	2	3
4	5	6	7	8	9	10

FEEDBACK

Organise your second life as a councillor using your calendar, and see when deadlines clash with events you're attending. Feed it directly into your personal calendar and never lose track of anything.



# Files

The screenshot displays the eCasework Files interface. On the left is a dark sidebar with icons for dashboard, casework, email, people, calendar, and files. The main area has a top header with the eCasework logo, navigation icons (Add case, user, calendar, mail, search), a notification bell, and a user profile 'Molly'. Below the header, a 'View: All my files' dropdown is present. A list of files is shown, with 'Mr Asamoah's letter' (Word document) selected. The right panel shows details for this file: a download icon, title 'Download Mr Asamoah's letter', and a note 'A Word document added on 11 October 2016'. A warning box states 'The file can not be deleted until it is detached from all cases'. The 'File details' section includes Title (Mr Asamoah's letter), Link (https://ecasework.com/file/agk4b), File name (Mr Asamoah's letter.docx), Added date (11/10/2016), Size (20.09 kb), File type (Word document), Tags (add tags), and Description (add a description). The 'File security' section shows options for who can see the file (Just me or Anyone I give the link to) and a 'Save security preference' button. A vertical 'FEEDBACK' button is on the far right.

**Files**

10:08

**eCasework**

Add case

5

Molly

**View: All my files**

**Regents Road flytipping 220917**  
Image

**Pothole on Brixton Rd**  
Image

**Letter to Mrs Horner**  
Word document

**Mr Asamoah's letter**  
Word document

**Trees need trimming**  
Image

**Pothole near Subway**  
Image

**Be A Councillor guide**  
PDF document

**Download Mr Asamoah's letter**  
A Word document added on 11 October 2016

*The file can not be deleted until it is detached from all cases*

**File details**

**Title**  
Mr Asamoah's letter [edit](#)

**Link**  
<https://ecasework.com/file/agk4b>

**File name**  
Mr Asamoah's letter.docx

**Added**  
11/10/2016, updated 11/10/2016

**Size**  
20.09 kb

**File type**  
Word document

**Tags**  
[add tags](#)

**Description**  
[add a description](#)

**File security**

Who should be able to see this file?

☐ Just me

☒ Anyone I give the link to

[Save security preference](#)

**FEEDBACK**

Never lose any of those important documents again. Anything you're sent that's related to a case will be automatically stored here and is accessible from anywhere in the world. All you need is access to eCasework.

## Add a case

Now it's time to add your first case. Adding and managing cases with eCasework makes it easy for councillors to handle their workload. Follow these instructions to add a case.

1. Click the 'Add Case' button at the top of the screen. A box will pop up.

**Case title \***

Local bars causing a nuisance

**Assigned to** you [Change](#)

**Tags** [tag this case to enable more detailed reporting](#)

**Due on** [18/01/2018 10:17](#)



**Attach file to case** [from your device](#) | [from eCasework](#)

**Associated contact** [no contact set](#)

**Case information**

**B** ***I*** **U**

Drunken people leaving the pub are causing a nuisance nearby, being rowdy and obnoxious. Pub manager doing little to curb this.

 **Add case**  [Take me to my new case](#)

2. Give your case a brief description in the 'Case title' box.
3. Cases are assigned to you by default. Click the 'Change' button to assign it to someone else.
4. Tags group cases into categories, and you can see which types of case are most common on your dashboard. We recommend adding tags to get more insight on your ward.
5. Set a due date for your case, either an initial or ultimate deadline, it's up to you!

6. If you need to add a photo, letter or other file to your case, attach a file to the case from your device.
7. Associate your case with the contact who raised it, if any. You can add them if they're not yet in your contacts list.
8. Describe the case and any action you would like taken to solve it.
9. Finally, click the 'Take me to my new case button' and click 'Add case'.

You've created your first case! It will show up in your case list on the Casework tab, and you can work on it however you see fit. Next we'll show you the different ways to work on and complete a case.

# How to complete casework

There's many different ways to complete casework and each councillor has their own method. We've designed the app to help you take whichever route you like, so here's a list of features and how to use them.

## **Update case**

The most common way to progress a case. It's good practice to communicate clearly with colleagues and constituents, to ensure that cases are solved satisfactorily. This is called 'signposting' and it allows people to see each step in a case's history. Use the 'Update case' button to mark down each step or record an instruction. It will help to change the case's due date for each new step.

## **Due date**

Whomever the case is assigned to, the due date gives that person an indication of when to complete a task. A case is marked 'Overdue' when today's date is later than the due date, meaning something has not been completed in time. We recommend setting due dates for tasks, not deadlines for cases.

## **Assign a case to an assistant**

If you have an assistant that helps you complete cases, you can pass a case to them. They'll receive a notification and will be able to use eCasework to manage cases.

## **Send email from a case**

If you don't have an assistant or need to contact a department, you can email them from within a case. All messages and any replies will be automatically added to the case history, meaning you'll never lose track of messages, instructions or key notes.

## **Manage casework from your email address**

You don't always need to log in to eCasework to manage your cases, you can do it from the comfort of your inbox. See page 13.

## **Mark case complete**

Solved the problem? Click the 'Case complete' button to mark the case as closed. Don't worry if you make a mistake, you're able to reopen the case whenever you need.

## Manage casework from your email address

You don't always need to log in to eCasework to manage your cases, you can do it from the comfort of your inbox.

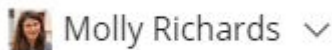
eCasework uses two key elements to record case updates from external sources.

- Emails sent to your eCasework email address, e.g. your.name@ecasework.com.
- A case identifier, e.g. RFHUP.

If your eCasework address is cc'ed into a message and the subject line contains the identifier, the message will be recorded in a case's history. We recommend raising cases in the app first, as you'll be able to copy the case identifier and use it in emails.

Follow these instructions to manage casework from another email.

1. Log in to your eCasework account.
2. In the top-right corner, click the arrow next to your name.



3. Click Add Case to add a new case.
4. Enter the case information and click Add Case to create the case.
5. You should now be viewing the case you created. Make a note of the case identifier.
6. Now head over to your other email inbox, e.g. yourname@council.gov.uk.
7. Compose a new message, making sure to add your @ecasework.com email as a recipient (usually in cc).
8. Add the case identifier to the subject line, e.g. [ec:RFHUP]. Make sure it's preceded by 'ec:' and that it's all encased in square brackets.
9. When you've finished composing your message, send the email.
10. The message should be added to your case in eCasework.

If you'd rather not copy the case identifier into your subject line, simply cc your @ecasework.com email into messages. You can then attach those emails to the relevant case or raise a new case from the Email tab.

If the person you've contacted hits 'Reply All' and copies in your eCasework address with the identifier in the subject line, replies from them will be picked up by the app too. You'll need to remember to log in to the app to update due dates on the case, but let us know if you have any feedback.

## Add a case by email

You needn't log in to eCasework to create cases, you can add cases automatically via email. It's especially helpful when residents send casework to many different email addresses.

1. Log in to eCasework.
2. In the top-right corner, click the arrow next to your name.



3. Click Settings.
4. Click Automatic case creation.
5. Type an email, e.g. yourname@council.gov.uk, in the box and click +.
6. Click Save Emails.

The email address you've added can create cases automatically by forwarding messages to your eCasework inbox. For example, when you're sorting through your council.gov.uk inbox and come across a case, forward it on to your eCasework inbox.



## Import your address book

You can import your existing address book from Outlook, Gmail, Nation Builder, mailing lists and canvassing software straight into eCasework. All you need to get started is a CSV or XLSX file with each column named (also known as a header row), which you can export from wherever your contacts list is currently held.

Follow these instructions to import your existing address book. This feature is not available on tablets or mobile devices.

1. Click the Add Person button.



2. Scroll down and click the Import button.



3. Choose your CSV or XLSX from your computer.
4. You'll need to match the columns in your file to the columns in our database. For each column, select the corresponding field using the drop-down. If the corresponding field doesn't exist in our database, you can use the Notes field or skip it.
5. Once you've finished matching or skipping columns, click Upload.  
Your file will be processed automatically and the contacts will be added to your contacts list in the People tab. Get in touch if you have any issues.

## Tips

### Set due dates for tasks, not deadlines for cases

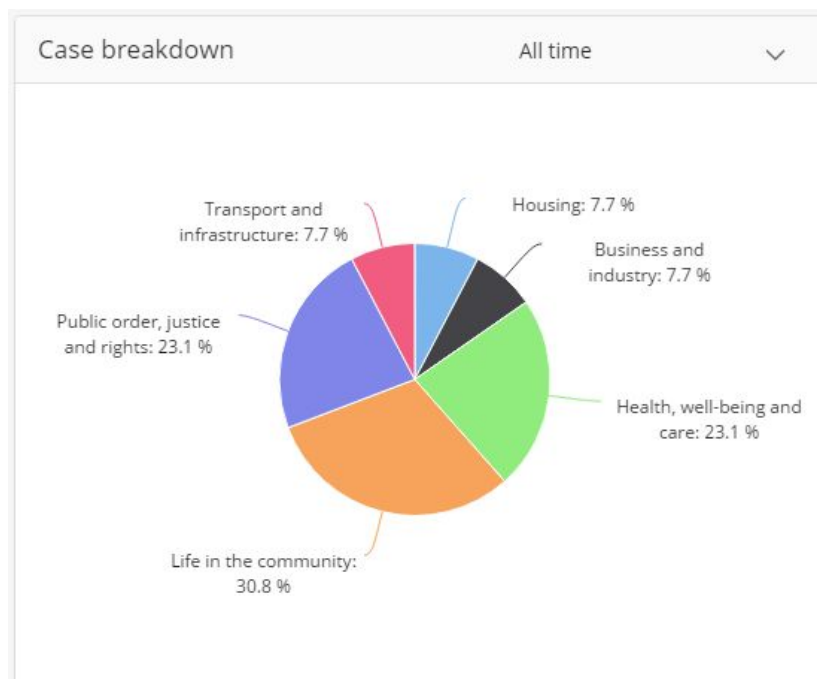
You can stay on top of your casework by breaking up the process into multiple tasks, and reviewing cases frequently. You'll be much more productive by focusing on completing small, achievable goals.

Next time you add a case, add a case update and describe the task that needs completing. Set the due date for a week's time, or whenever the task can be reasonably completed. You'll be prompted to review the case on the due date and can update the case. You can also set a default due date and time for your casework. See page 18.

Remember: a case often has several factors that determine when and how it can be solved. You don't need to solve each case immediately, but by completing each step in a timely manner, you're more likely to stay on top of your casework.

### Tagging cases builds a picture of local problems

When it comes to campaigning, you need to know the issues you'll be expected to face. If any particular issue prevails as the most common, you'll need to vow to tackle the related problems. By tagging your casework, you can build a picture of pertinent local issues and make your cases work for you.



### Quickly find cases, people, emails, events and files by searching

Have you tried the search tool? It'll help you find anything in eCasework quickly, whether that's a group of people or an individual case.

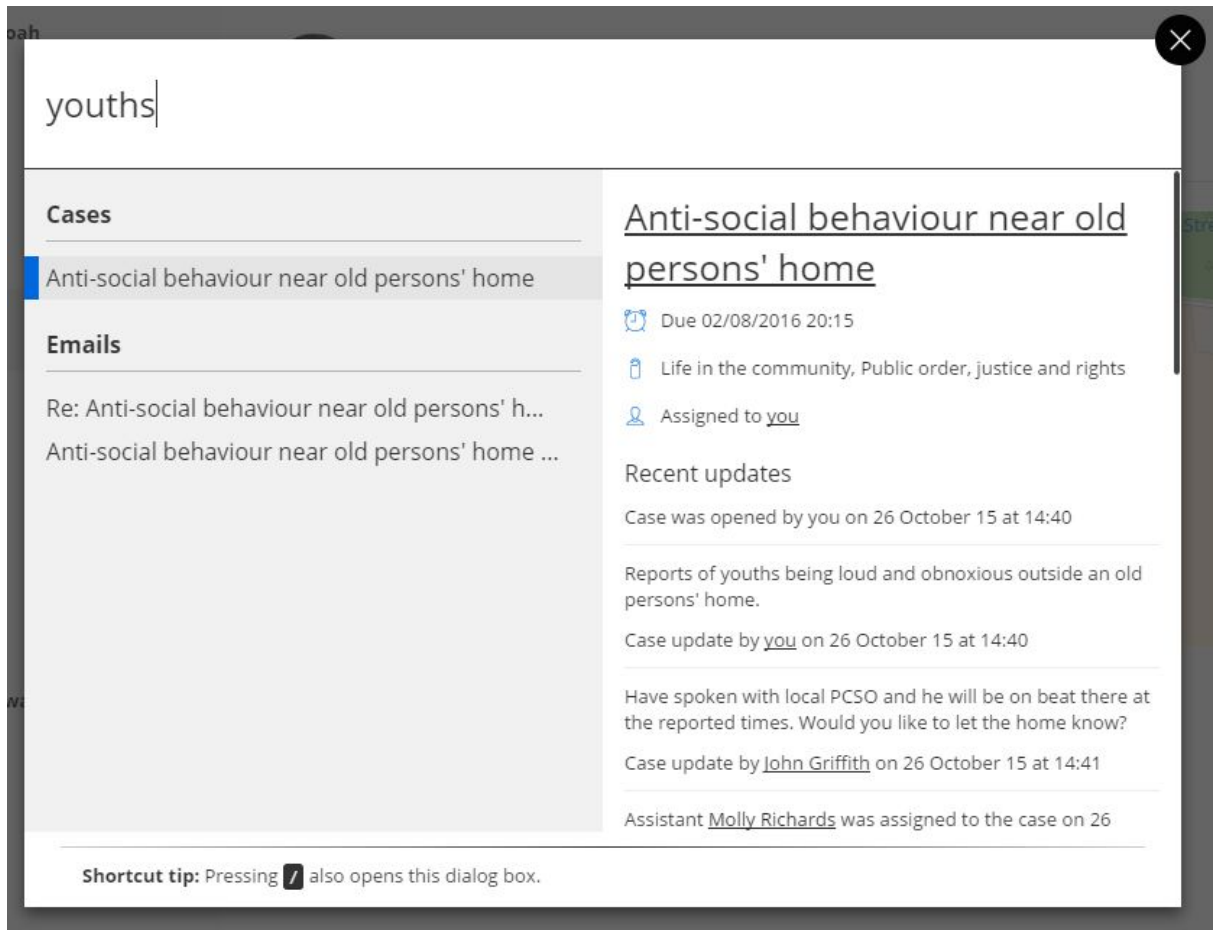


Follow these instructions to use the search tool (not supported on tablet or mobile).

1. Click the search button.



2. The search box will appear.
3. Start typing a word or tag to find the case, contact, email, event or file you're looking for.

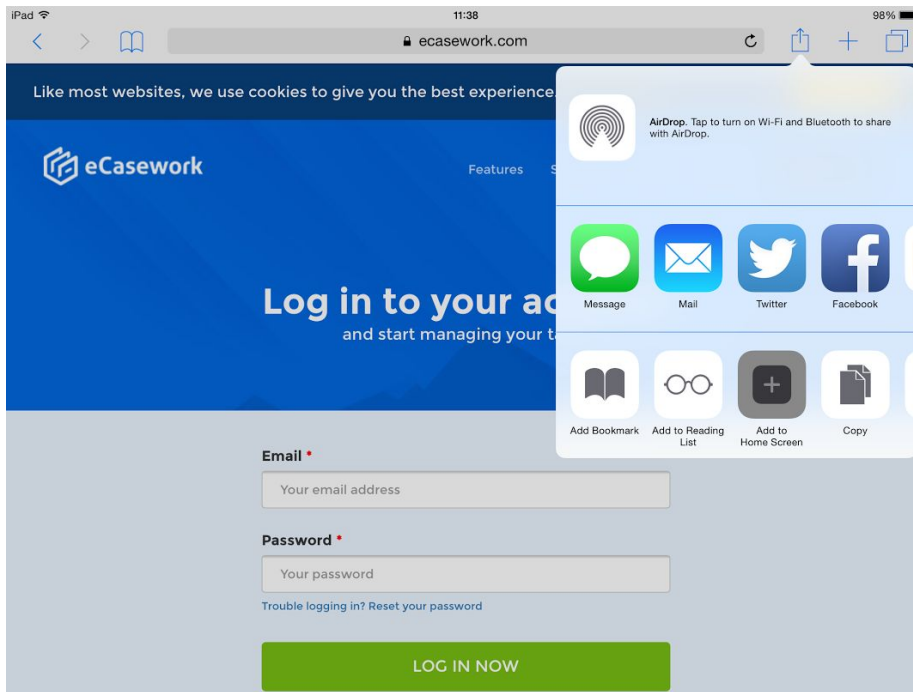


4. Use the Up and Down arrow keys to select a case, contact, email, event or file. Press the Enter key to view the case, contact, email, event or file.

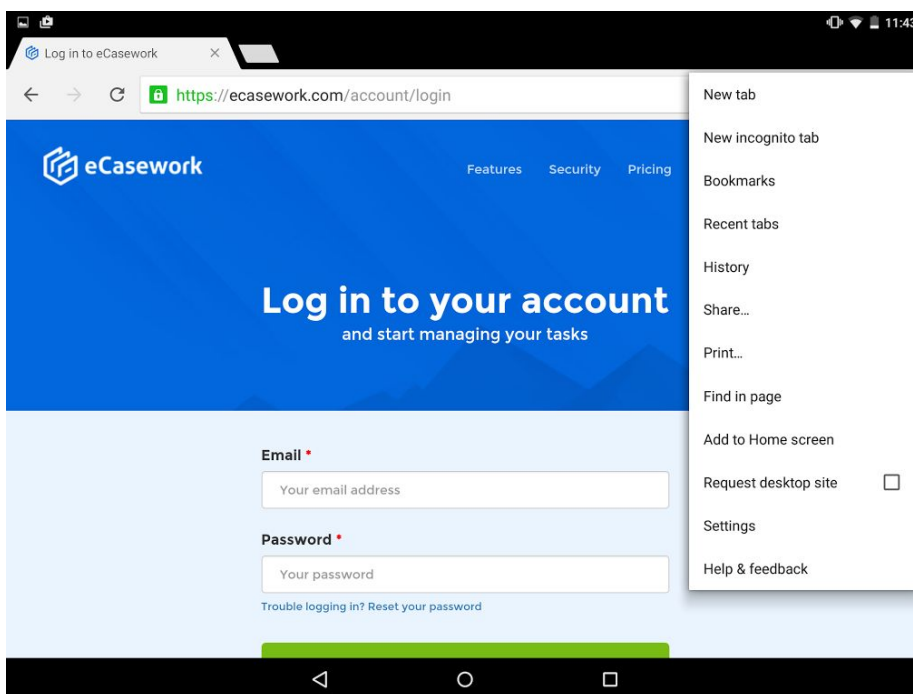
### Launch eCasework like an app

Instead of opening a web browser and typing in our web address on your iPad, tablet or smartphone, you can speed things up by adding the login page to your Home screen.

In Safari, tap the Share button, then tap Add to Home screen. Confirm you're happy with the title and then tap Add. An icon will appear on your Home screen.



In Chrome, tap the Settings button (the three dots in the top-right of the screen), then tap Add to Home screen. Confirm you're happy with the title and then tap Add. An icon will appear on your Home screen.



## Set a default due date and time for your cases

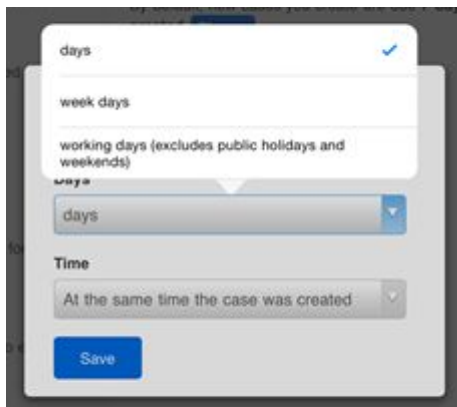
Due dates can help you stay on top of your casework, reminding you to revisit your casework frequently. Residents will expect to hear about your progress, and setting a default due date makes it easy to check in with them.

Follow these instructions to set a default due date and time for your casework.

1. Log in to eCasework.
2. In the top-right corner, click the arrow next to your name.



3. Click Settings.
4. Click SLA.
5. Click the 'Change' button.
6. Use the drop-downs to choose a default due date. We recommend 10 working days at the time the case was created.

A screenshot of a settings form for SLA (Service Level Agreement). It features two dropdown menus. The first dropdown is labeled 'days' and has a blue checkmark icon to its right. Below it, the text 'week days' and 'working days (excludes public holidays and weekends)' is visible. The second dropdown is labeled 'Time' and has the text 'At the same time the case was created' below it. A blue 'Save' button is at the bottom of the form.

7. Click Save.

### **Receive reminders for cases due today**

What's on your plate for today? With our Notifications feature, you'll be sent an email reminding you which cases are due today, helping you to keep on top of your casework.

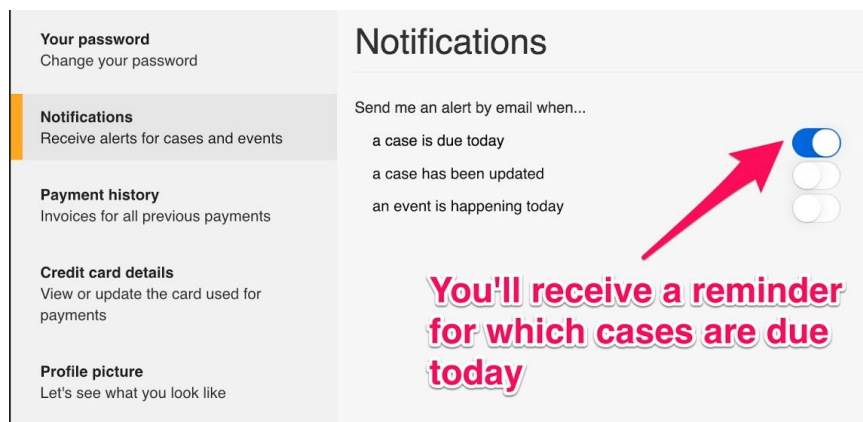
Follow these instructions to receive a reminder when cases are due today.

1. Log in to eCasework.
2. In the top-right corner, click the arrow next to your name.



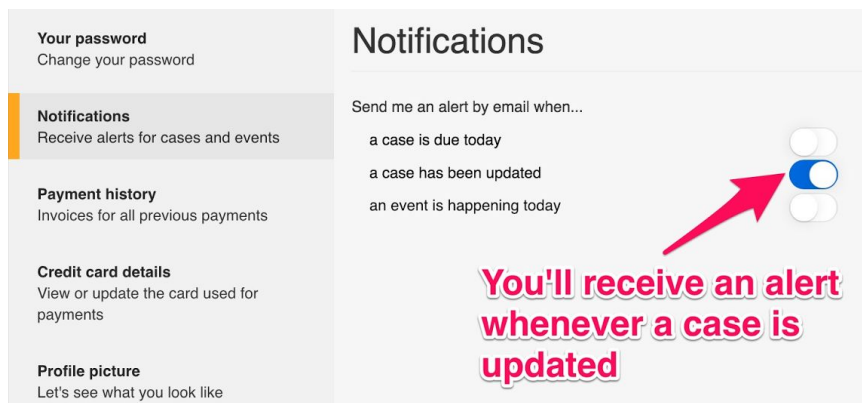
3. Click Settings.
4. Click Notifications.

5. Turn on the button next to 'a case is due today'.



If you have cases due today, we'll send you an email in the morning to remind you which cases need attention.

You can also receive alerts when a case is updated, helping you to keep track of officers, replies from the council and more.



## Join us for a product demo

Want to find out more about how eCasework works? We can give you a quick demonstration of its features via video conference. You don't need any special software or even a camera, and you can pick a time to suit you.



Click the yellow live chat button to speak to one of our support team and we'll arrange a time for the demo.

## Need more help?



If at any point you get stuck, click this yellow button to speak directly with one of our support team. They'll be able to help guide you immediately.

You can also find helpful videos on our YouTube channel. Search for us on [youtube.com](https://www.youtube.com)

We also have a help site with lots of step-by-step guides, which show you how to use all features of the software. Visit the help site at <http://help.ecasework.com>