

This TechNote describes the new **UserVoice** tool available within **Agency Integrator**. This tool will be used to prioritize and discuss **Enhancement Requests** submitted by users of the system.

Contents

Introduction 2

Accessing UserVoice 2

Using UserVoice 3

 Submitting New Enhancement Requests 3

 Reviewing Enhancement Requests..... 6

 Discussing Enhancement Requests..... 7

 Voting on Enhancement Requests..... 8

UserVoice Settings 9

Introduction

At our annual User Conference in March 2011, we held an open forum discussion about the list of the Top 50 Enhancements to be voted on by the User Group. During this discussion, several participants expressed the desire to change the existing enhancement request and voting process. On June 25, 2011 we released a new tool called **UserVoice** that will help create a more interactive, dynamic, community-driven process for implementing enhancement requests. **UserVoice** will allow for:

- An active discussion on each item by allowing users to post comments for each idea
- A better understanding, through this interaction, of the kind of effort each enhancement could be expected to take
- An up-to-date list of “hot” items
- Faster response in implementing highly regarded requests

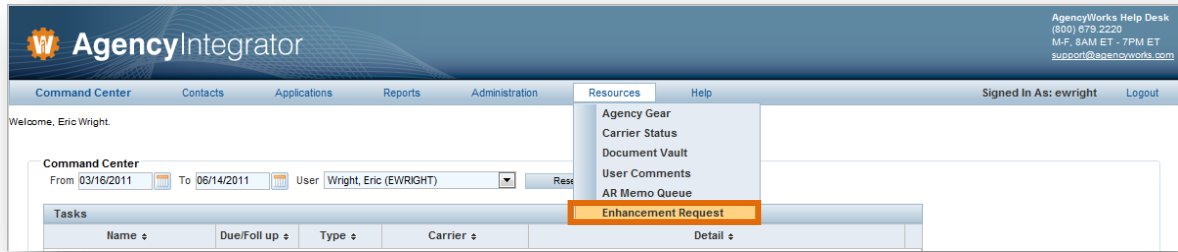
Note: **UserVoice** is only accessible from the **New Agency Integrator** and is not available through the legacy system.

Accessing UserVoice

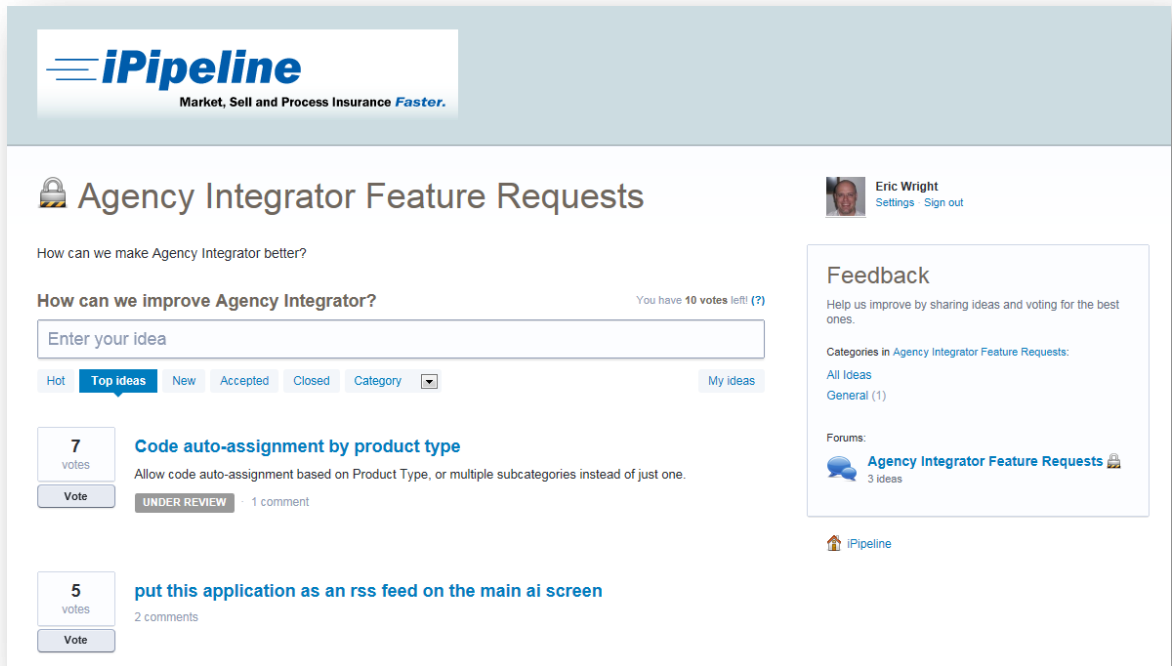
Log in to Agency Integrator at <https://ai.ipipeline.com>



Once logged in, hover over **Resources** on the top menu bar and click **Enhancement Request**.



You will be logged in seamlessly to the new **UserVoice** tool:



Using UserVoice

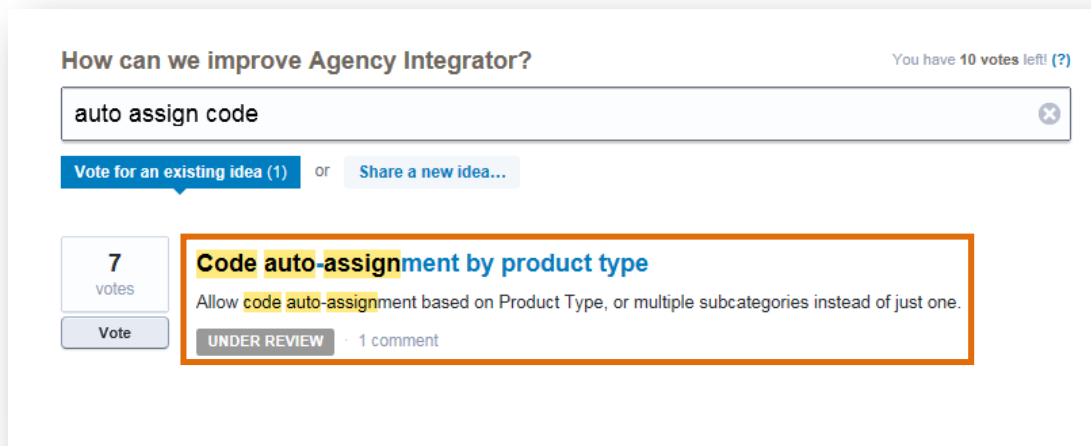
UserVoice allows you to submit, review, discuss, and vote on **Enhancement Requests**. We'll review each function:

Submitting New Enhancement Requests

To submit a new idea for improving **Agency Integrator**, type in the box labeled **Enter your idea**:

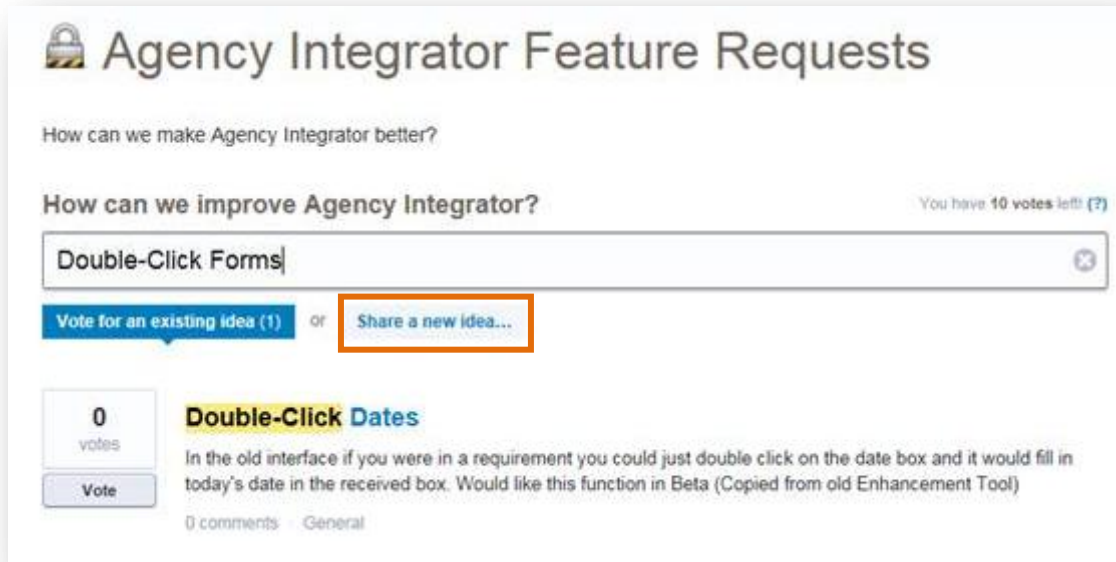


As you do so, a search of the current list of Enhancement Requests will be performed automatically to help you determine if your idea has already been submitted:

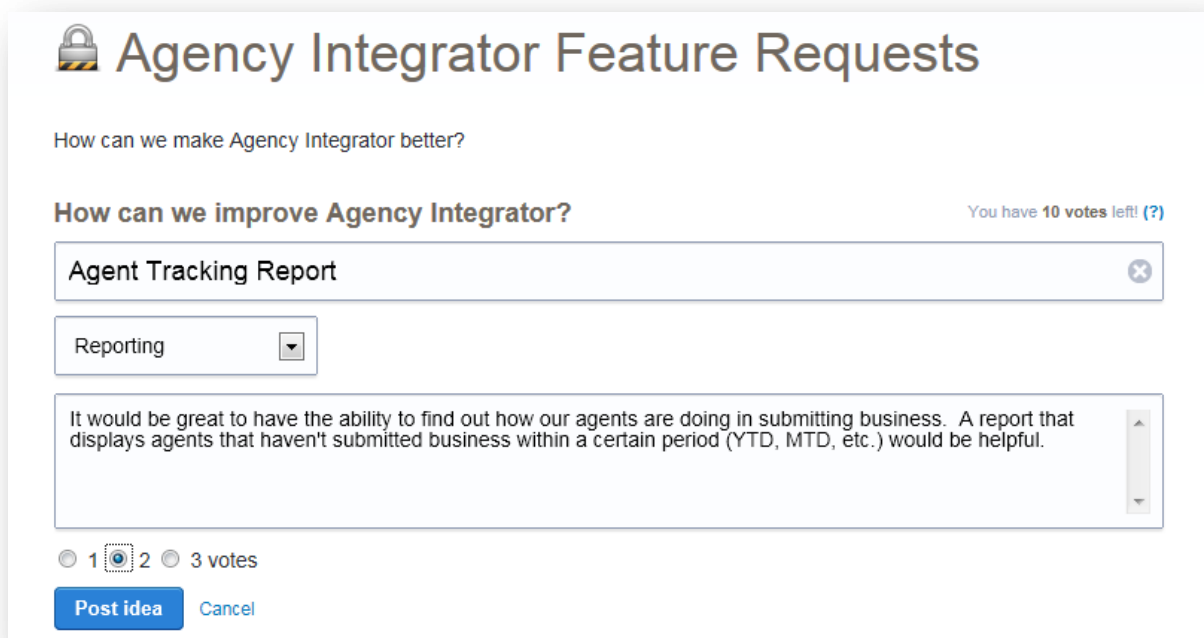


If the search returns a similar idea that has already been submitted, you may want to vote on it, and/or participate in the discussion surrounding it.

If your idea hasn't already been submitted, you can do so by clicking the **Share a new idea** button.



A new screen will appear. Complete the fields shown and then click the **Post idea** button:



Keep in mind that the text you enter in the main field will become the title of your new idea that others will view and search for. Make sure it's descriptive, specific, and representative of your idea as a whole. You may also decide to allocate some of your **Votes** on this new idea as well. Voting will be described later in this TechNote.

Reviewing Enhancement Requests

UserVoice allows you to review existing Enhancement Requests right on the main page. By default, the list of enhancements you see are those with the highest number of votes.

Agency Integrator Feature Requests

How can we make Agency Integrator better?

How can we improve Agency Integrator? You have 10 votes left! (?)

Enter your idea

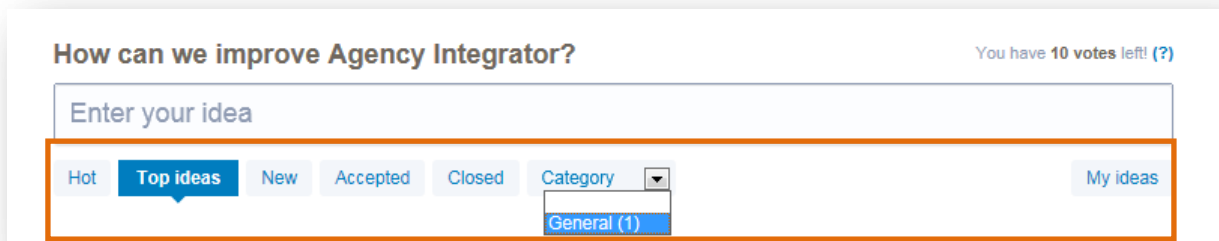
Hot **Top ideas** New Accepted Closed Category My ideas

7 votes
Vote **UNDER REVIEW** 1 comment
Code auto-assignment by product type
Allow code auto-assignment based on Product Type, or multiple subcategories instead of just one.

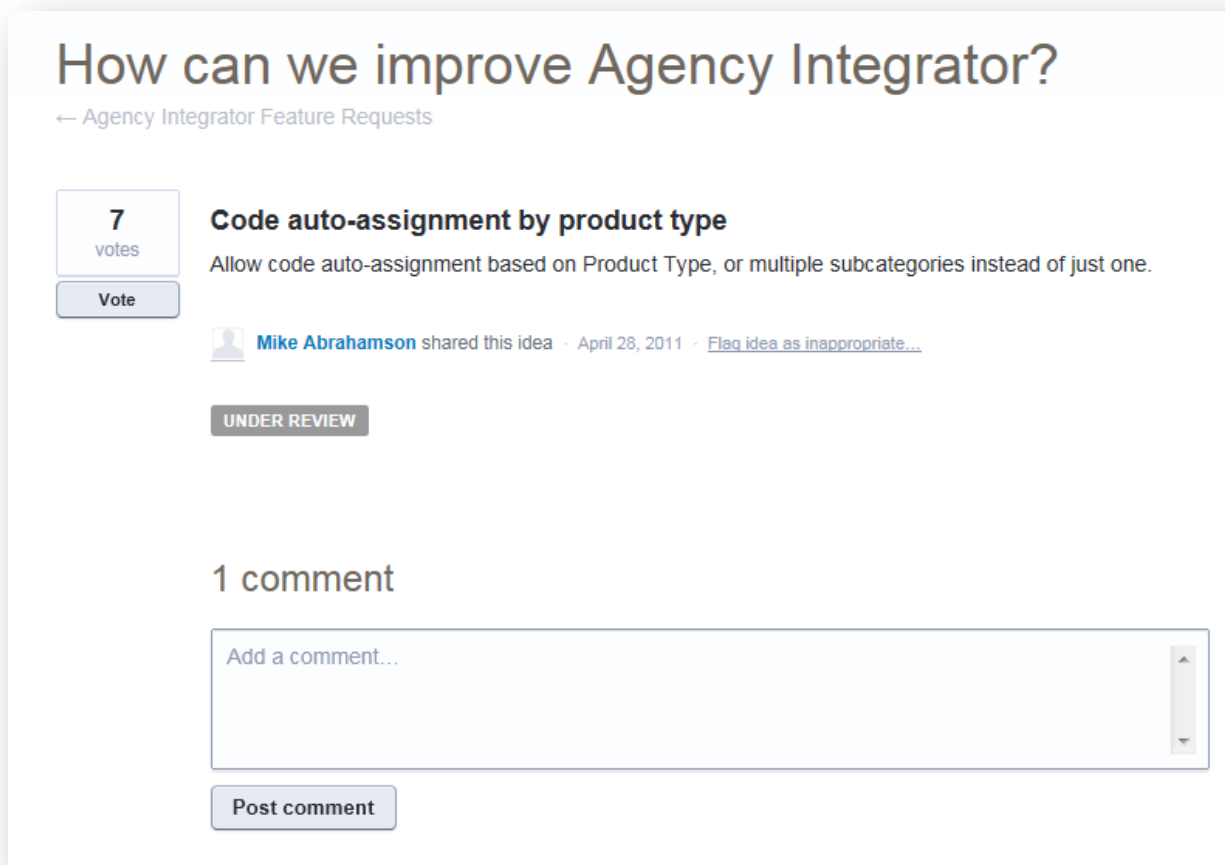
5 votes
Vote **put this application as an rss feed on the main ai screen**
2 comments

However, you can also choose to view the list of enhancements by the following:

- **Hot Ideas:** Those Enhancement Requests with the most discussion surrounding them
- **New Ideas:** The most recently submitted Enhancement Requests
- **Accepted Ideas:** Enhancements that the iPipeline development team has accepted to be worked on next
- **Closed Ideas:** Enhancement Requests that have either already been done, or have been closed due to a lack of information, interest, or feasibility
- **Category:** Lists of Enhancement Requests based on their categorization, such as **Reporting**, **Case Management** or **Administrative**
- **My Ideas:** Shows a list of Enhancement Requests that your user ID has submitted



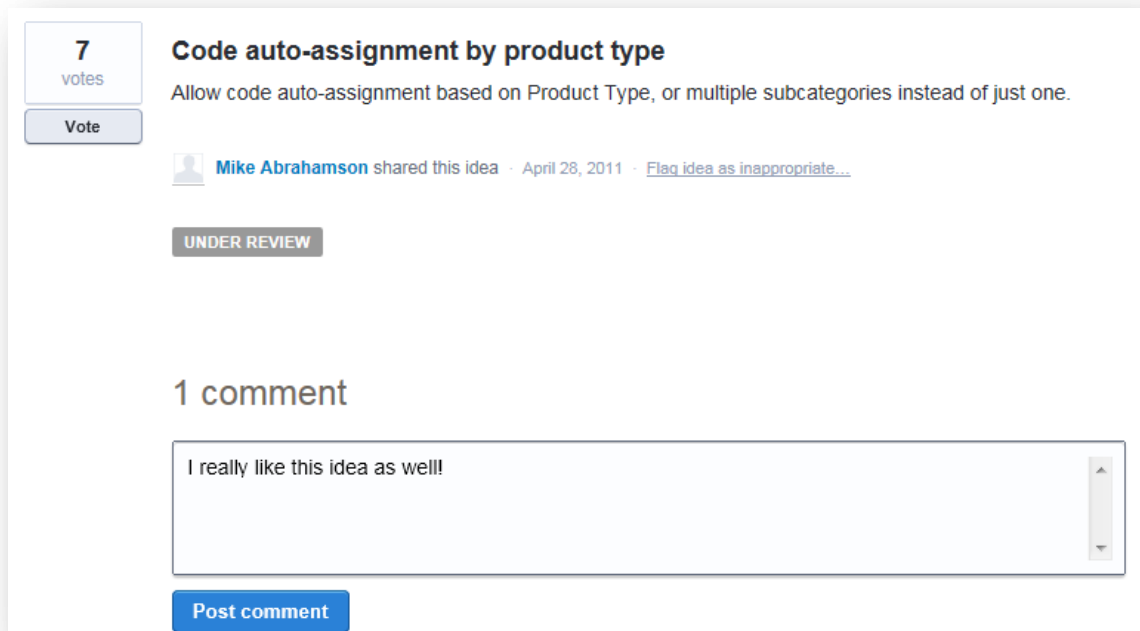
If you would like to see more information about a specific Enhancement Request, simply click on the title of the idea and the full detail will be displayed, along with any comments submitted by iPipeline staff, our **User Group Advisory Board** members, and other **Agency Integrator** users.



Discussing Enhancement Requests

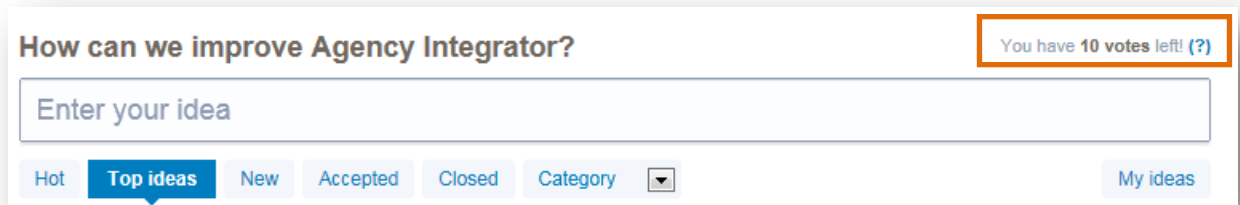
Perhaps you have a question as to how a particular enhancement could be implemented or incorporated to be of the most use to your agency. Perhaps your agency has already discovered a process that makes the enhancement less impactful. Or, perhaps you really like the enhancement

and want to show your support with more than just a vote. **UserVoice** allows for an active discussion on each item by allowing users to post **Comments** for each idea.



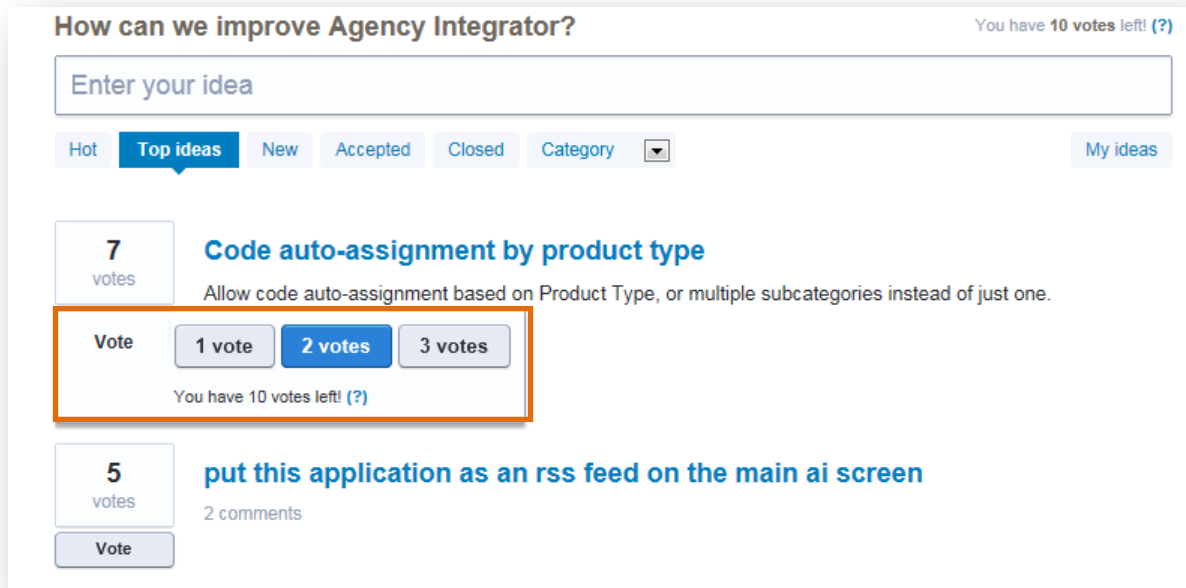
Voting on Enhancement Requests

Each user has a total of 10 votes to use. The number of votes you have left will appear in the upper right of the **Enter your idea** field:



This notation will also update each time you use votes to indicate how many you have remaining.

Voting on Enhancement Requests is simple. Click on the **Vote** button to log your vote.



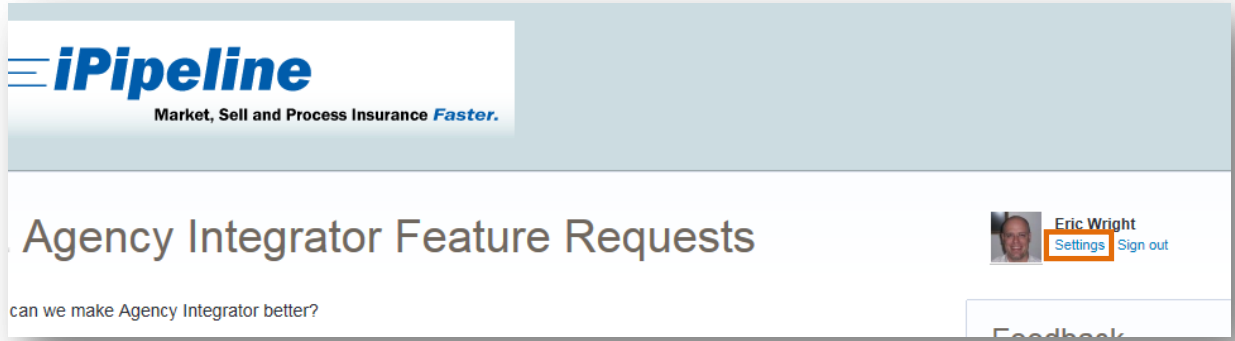
You also have the option to vote multiple times on a single idea. You're allowed to allocate up to three votes on an Enhancement Requests.

Once you've used up all 10 of your votes, you may not vote any more enhancements. However, there are two ways to get your votes back:

- 1- You can remove your votes from any previously voted on enhancements by clicking on the **Remove Votes** button.
- 2- Once an Enhancement Request is closed (e.g. completed), any votes allocated to that Enhancement are returned to those who voted on it.

UserVoice Settings

In addition to the main features of **UserVoice**, there are some optional components that you may wish to take advantage of. Click on **Settings** under your name in the upper right of the page to view a list of these optional settings:



Within this **Settings** area, you can add an **Avatar** (such as a picture of yourself) and choose how you are notified by **UserVoice** when updates are made to your ideas.