

# Feedback User Guide

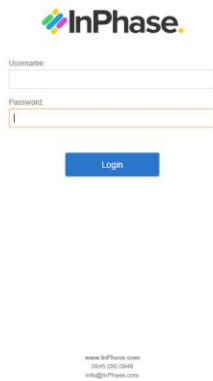
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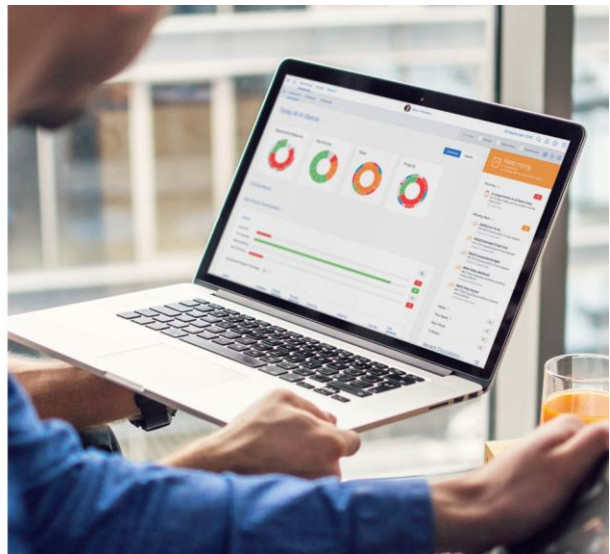
## General Navigation and User Preferences

### Accessing the Site

To access InPhase please enter your InPhase URL into any web browser.



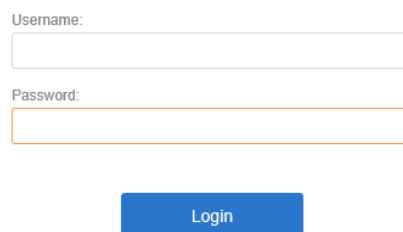
The screenshot shows the InPhase login page. At the top is the InPhase logo. Below it are two input fields: 'Username' and 'Password'. The 'Password' field has a small eye icon to toggle visibility. A blue 'Login' button is positioned below the fields. At the bottom, there is a footer with the website URL 'www.inphase.com', a phone number '01454 200100', and an email address 'info@inphase.com'.



### Username and Password

Usernames and passwords can be granted by an administrator.

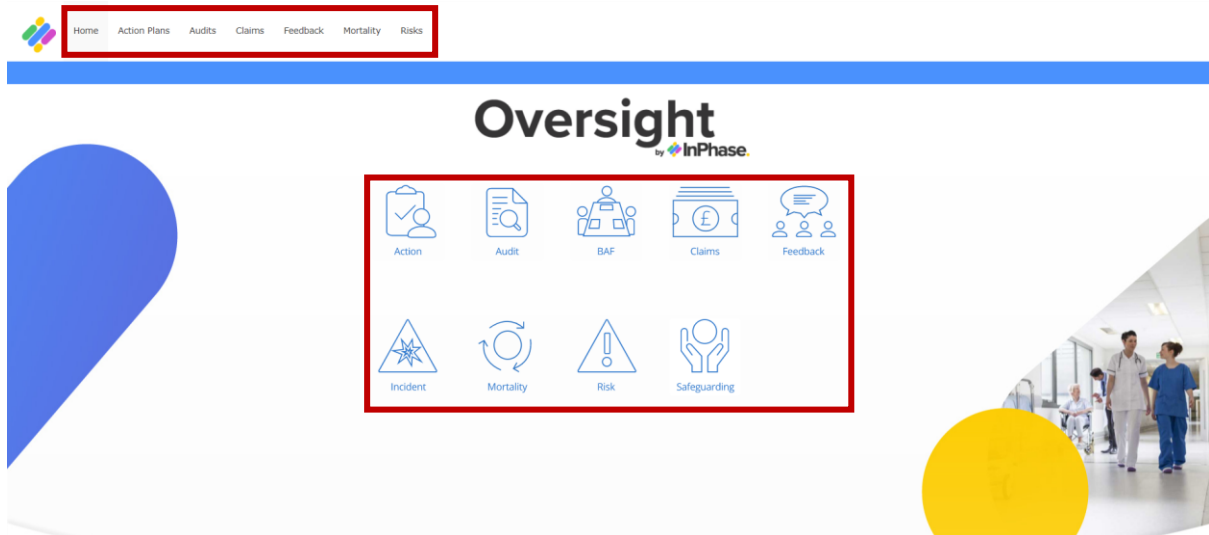
The username format is; ***FirstName Surname***



The screenshot shows a close-up of the login form. It features the InPhase logo at the top. Below the logo are two input fields: 'Username:' and 'Password:'. The 'Password' field has a small eye icon. A blue 'Login' button is located below the fields.

## Navigation

To navigate to a page, click on the icon in the main menu, or the relevant option on the menu at the top of the page.

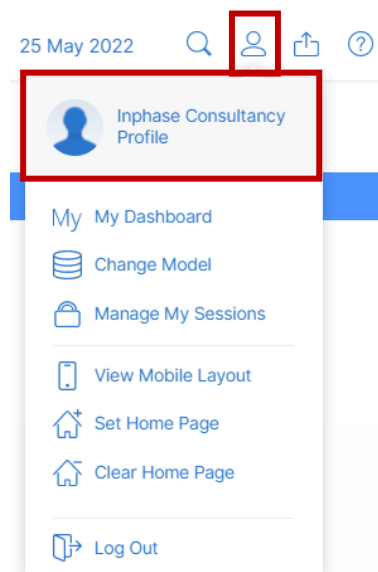


To return to the HOME page, to access your personal dashboard or to refresh the page you are on use the icons in the top left-hand corner of the screen

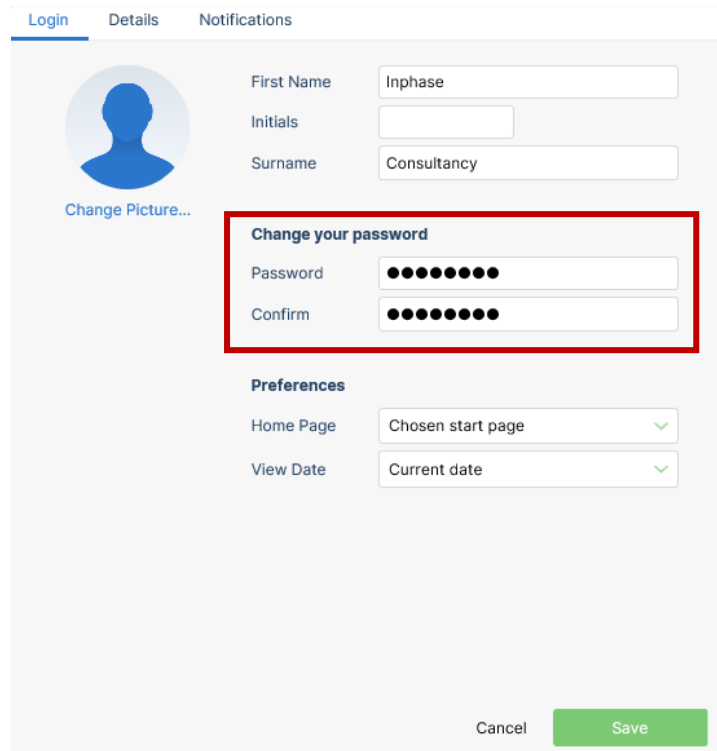


## Changing Password

Click on the person icon at the top right-hand corner of the screen. Select **Profile** from the drop-down menu



Enter your new password in the fields provided and click save.



The image shows a user profile settings form with the following sections:

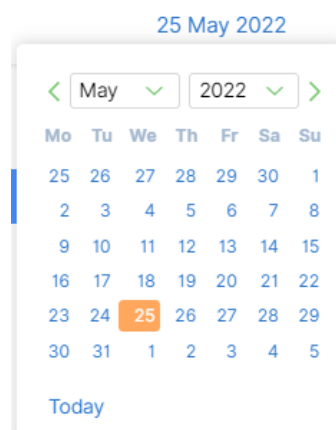
- Navigation:** Login, Details, Notifications
- Profile Information:** First Name (Inphase), Initials (empty), Surname (Consultancy)
- Change your password:** Password (masked with 10 dots), Confirm (masked with 10 dots)
- Preferences:** Home Page (Chosen start page), View Date (Current date)
- Buttons:** Cancel, Save

You will notice that you have other preferences that you can change on the profile pop up also.

## View Date

Data entered and displayed in InPhase is tracked by date. This means that if you wish to see past date or future time periods you can by simply changing the view date.

The view date is in the top right-hand corner of the screen. Click the date to produce the calendar.



## Adding an Action

In each App there are icons or buttons to add Actions. Adding an action regardless of the App or page you are on requires the same process.

### Actions

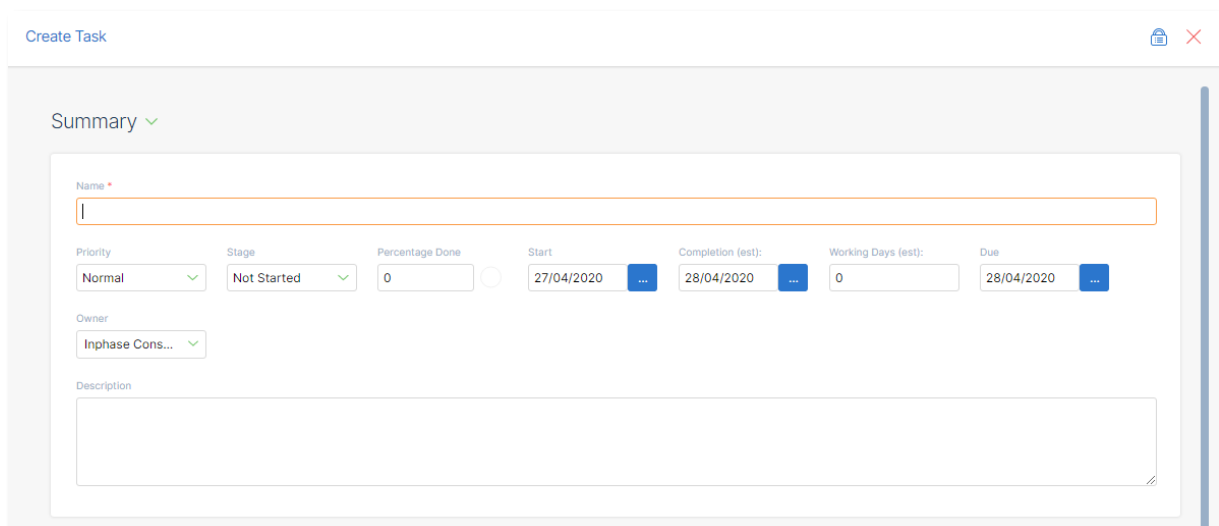
Please click the icon to create any Actions if required



Clicking on either an Add Action button or Icon will produce the Action pop.

The following fields need to be completed:

- Name
  - Limited to 100 Characters. Should be clear and concise to what the action is.
- Start
  - Calendar Selector. Date of when action will start
- Completion (est)
  - Calendar Selector. Data of when action is estimated (or actually) completed. When first adding an Action this should be set as the same as the Due Date
- Due
  - Calendar Selector. Date of when action is due to be completed by
- Owner
  - Defaults to the user adding the action. Can be changed if someone else will be responsible for completing the action.



Once you have completed the required fields click Create.

## Feedback

### Feedback Management

This page displays all feedback in the site. The infographics display a count of each feedback type.

Home
Feedback
Feedback Search

Feedback Actions

## InPhase Feedback Management

Welcome to the InPhase Feedback Management App.

In this section you are able to record, update and report on complaints and compliments

[Add Feedback →](#)

Comments

0

Complaints

1

Concerns

0


Compliments

0


ID	View	Record Type	Description	Method of receipt	First Received	Subject
Feedback 00000001	<a href="#" style="color: #007bff; text-decoration: none;">View →</a>	Complaint	the description will go here as a test	By telephone	11 Jul 1991	Clinical Treatment

To view the details of a feedback record, click on the 'View button'. This will take you to the Feedback Form.

Back



#1 READ ONLY Completed



Details

What type of record is this? \*

Origin Team \*

Is this a significant complaint?

Method of receipt \*

Does the complaint involve any of the following \*

First received \*

Incident Date

Description \*

Complaint

Complaints

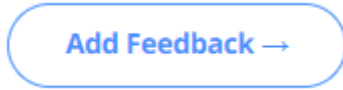
Autism

11 Jul 1991

the description will go here as a test

## Add Feedback

To create a new Feedback record, click on the 'Add Feedback' button.

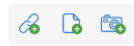


This will open the Feedback Form. Please fill in the required fields, and then click 'Submit'.

Remove this section

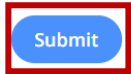
+ Additional Person Details

### Documents



Would you like to attach any documents? \*  
Please use the icons to upload your files

Yes No



The buttons available to you at the bottom of the form may be different, depending on the stage of your Feedback record.

## Feedback Actions

This page displays details of all Actions that have been added against Feedback records. You can filter the table using the slicers at the top and can edit the Actions by clicking on the 'Data Entry Mode' icon. If needed, the Action table can be exported to Excel by clicking on the icon in the top right corner.

Home Feedback Feedback Search

Feedback Actions

### Feedback Action Tracker

Owner: Inphase Consultancy | Due Date Between: | Stage: Not Started

Action	Details	Add Sub-Action	Owner	% Complete	Start Date	Due Date	Completion Date (est)	Late by Working Days	Action Update
This is a test action			Inphase Consultancy	0%	10/10/2022	31/10/2022	31/10/2022	0	n/r

## Feedback Search

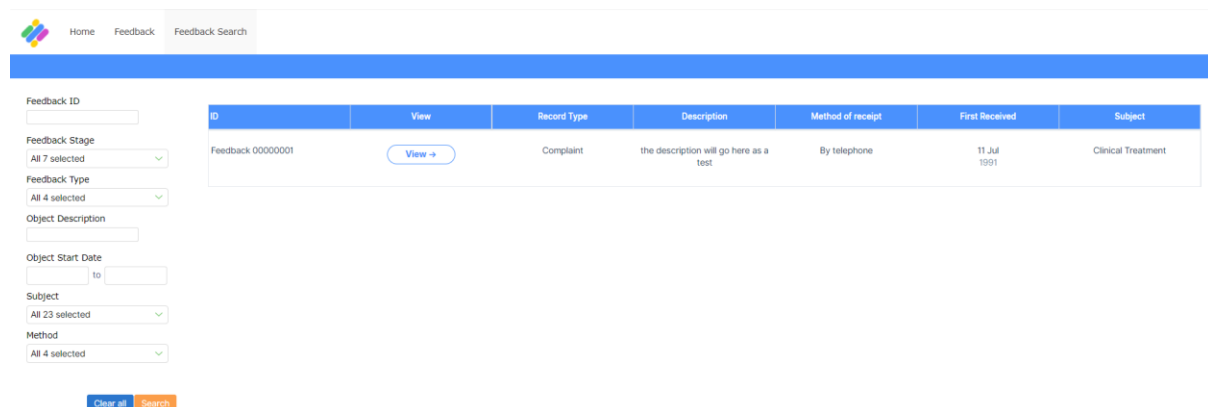
This page allows you to search for a Feedback record.

You can enter your search criteria into the fields running down the left hand side of the page, and then click 'Search' once all your search criteria have been entered.

The search results will then be populated in the table.

You can search by:

- Feedback ID
- Feedback Stage
- Feedback Type
- Description
- First received
- Subject
- Method



The screenshot shows the Feedback Search interface. On the left, there are search filters: Feedback ID (text input), Feedback Stage (dropdown: All 7 selected), Feedback Type (dropdown: All 4 selected), Object Description (text input), Object Start Date (date range input), Subject (dropdown: All 23 selected), and Method (dropdown: All 4 selected). At the bottom left are 'Clear all' and 'Search' buttons. The main area displays a table with one record:

ID	View	Record Type	Description	Method of receipt	First Received	Subject
Feedback 00000001	<a href="#">View -&gt;</a>	Complaint	the description will go here as a test	By telephone	11 Jul 1991	Clinical Treatment