

Iken Cloud Case Management Service Definition



iken
know what matters[®]

Introducing Iken

We are an integral technology partner connecting knowledge, people and systems to maximise productivity throughout hundreds of organisations across the UK.

As case management specialists, our technology supports customers in streamlining their processes, demonstrating their value, transforming their ability to share information securely, building resilient working practices and ultimately enhancing their productivity. We work with a wide variety of teams including Legal Services, HR, Information Governance, Trading Standards, Property & Estates and Social Care.

Our technology is highly configurable, allowing us to meet the requirements of different teams as they onboard with Iken Cloud Case Management.





Matters closed
15



Matters updated
27

Monthly Catch Up	DIS-12	2/4/2024
Meeting with Payroll	354	3/4/2024

Our company was founded in 1992 on the commitment to create a software solution to support case management for public sector teams. We are a proudly independent, customer-centric organisation, combining the highest standards of customer care with an advanced set of technologies.

Why work with us?



We offer clients:



A true Software as a Service solution, continuously developed to meet emerging user needs



A dedicated account manager focused on ensuring clients get the most from their subscription



Security: Established in 1992, we are both ISO 27001 and Cyber Essentials certified



A thriving user community with regular user group meetings, workshops and an opportunity to feed into the product roadmap and wider development of our service



Comprehensive onboarding assistance from our experienced project managers, trainers, data migration analysts and technical specialists



Expert industry knowledge: we recognise that you deal with complex and diverse work, often with pressures on time and resources. Our expert team is on hand to provide advice and support to assist you in navigating these evolving challenges



An experienced and highly responsive UK-based support team with excellent customer satisfaction ratings and a variety of tools to assist with incident management

What's included?

Secure access to Iken from anywhere.

Secure access to Iken from anywhere. Case management software which integrates with Microsoft Office 365 and Google Workspace, supporting remote, collaborative working for busy professionals across a wide range of public sector teams.

The screenshot displays the Iken Cloud Case Management interface. On the left, a sidebar shows navigation options: Matters (selected), Documents, and Time & Charges. The main area features a 'Matters' table with columns for Action, Matter, and Type. A 'Docs added' notification indicates 33 documents. A 'Selected documents (2)' panel lists 'Doc ref 134 - Discovery work' and 'Doc ref 102 - Research doc'. A 'Select matter *' dropdown menu is set to 'Sienna Cullen'. The bottom of the interface shows logos for Microsoft 365, Google Workspace, and bundledocs.

Action	Matter	Type
☐	Roman Jones	FOI: Information Request
☐	Dan Baker	Contract
☐	Sienna Cullen	Personal Work
☐	Jett Case	Training
☐	IT - Software	Information Technology
☐	Administrative Staff	Quality Standards
☐	Interon	Financial Services

Selected documents (2)

- Doc ref 134 - Discovery work
- Doc ref 102 - Research doc

Select matter *

Sienna Cullen

Microsoft 365

Google Workspace

bundledocs

Features

Comprehensive email and document management. Iken Cloud helps your team manage emails and documents from Microsoft 365 and Google Workspace:

- ✓ Email and document management with automatic indexing
- ✓ Pre-populate email and document templates with relevant case data
- ✓ Use powerful search capabilities to identify key documents and emails located across multiple files

Integrated, customisable workflow technology. Iken Cloud workflows support the management of processes, ensuring cases are consistently managed to the standards required:

- ✓ Configure each stage and step required to manage a process from start to finish, supporting adherence to industry best practice and legislation
- ✓ Automate routine tasks, capture case- critical data and populate the associated documentation with data recorded in the workflow at each stage of the process
- ✓ Create rules-based decision making and branching of processes based on criteria set by your team
- ✓ Record changes to the workflow, assisting with audit, security and risk management



Matters

Matters closed
15

Matters updated
27

Pinned Matters

Name	Ref
45 Barbican High Street	255
Fly Tipping Prosectution	4873
Sienna Cullen	asc-012
Jett Case	asc-013

Open Matters

Documents

Name	Ref	Matter
Land Sale Referral	71	1 Church Farm...
Prosecution Precedent	122	Jett Case
Re: First Warning	354	Yared
Privacy and Policy	393	Cranchester
Training Agenda	200	Accounts and...

Features

Management reporting and analytics.

The Iken Cloud reporting suite provides essential evidence to showcase the work your department delivers:

- ✓ Produce reports in multiple formats
- ✓ Access a selection of the most frequently used reports
- ✓ Review a summary of key analytics in a single dashboard
- ✓ Interactive reporting allows users to drill down into key metrics and case files from summary charts

Document bundling integration:

- ✓ Iken Cloud integrates with market-leading cloud bundling provider Bundledocs, supporting the effective creation and management of fully indexed and paginated document bundles for use in various situations

Iken diary and task management:

- ✓ Integrates with MS Office 365 and Google Workspace calendars
- ✓ Schedule tasks and appointments linked to your cases
- ✓ Manage key dates via Iken Cloud's diary or workflow as required

Integrated time recording, providing additional data for management information:

- ✓ Demonstrate value with team analytics
- ✓ Deploy resources effectively with detailed data on workload and activities
- ✓ Analyse the costs associated with effective service delivery

Reporting



Time recording

Stopwatch ✕

Select Matter*

Sienna Cullen

Select Activity*

Telephone conversation

00:10:00

Sienna Cullen
Telephone conv...

00:10:00

Benefits



Safeguard confidential data with case access restrictions



Instant and simple access to knowledge and information



Perfect for secure, collaborative and remote working between individuals and teams across a range of devices with information hosted in Microsoft UK data centres



Create additional capacity and improve consistency by streamlining and standardising your processes with Iken's integrated workflow technology



Iken Cloud Case Management offers an intuitive, accessible user interface. We want Iken Cloud to be of benefit to all users which is why we have designed and tested the product to adhere to the WCAG 2.2 AA accessibility standard



Benefit from predictable and controlled technology costs with reduced infrastructure overheads. The Iken Cloud subscription fee includes use of the software, support, hosting, security and maintenance



Demonstrate team value and support strategic decision-making with management reporting and analytics



Benefit from a continuously advancing technology supported by our expert product, onboarding, training and support services

The Customer Journey

The introduction of new software into most organisations brings an element of change, with varying levels of disruption during set up, roll out, training and end user adoption. We know from experience how to ensure a successful migration of data with minimum disruption to busy teams and organisations.

Our Project team has over 20 years of implementation experience covering a range of sectors and organisations. The team includes experienced data migration analysts and has developed a successful and structured approach to onboarding with Iken Cloud with the transition clearly divided into pre-defined stages.

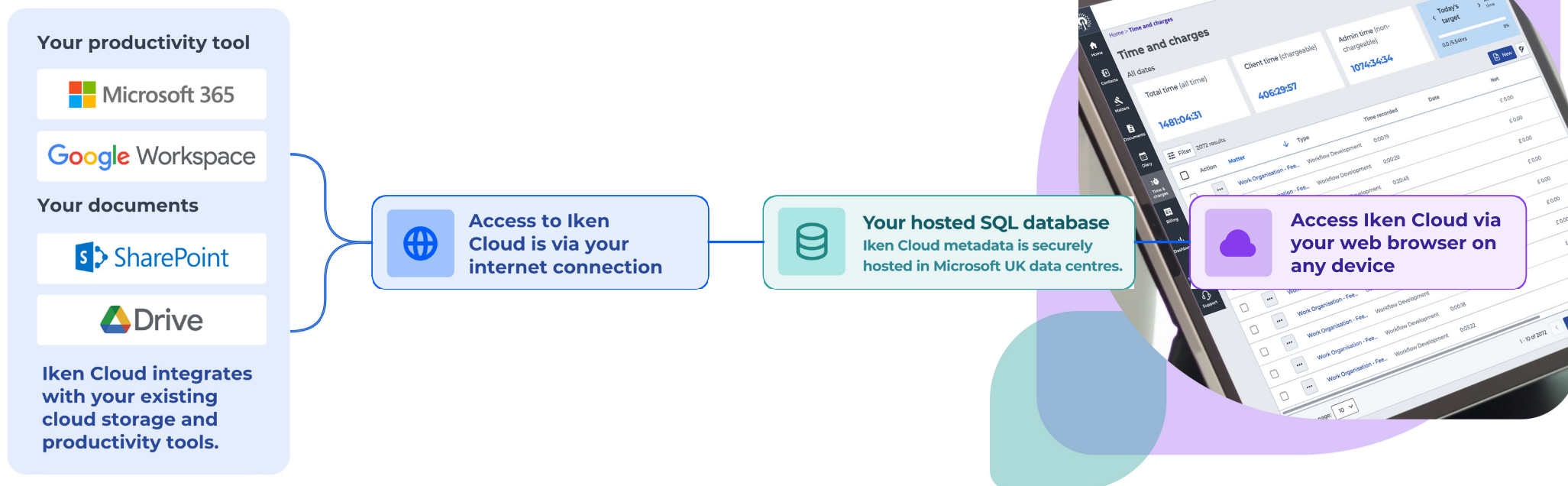
Each stage is designed to achieve specific objectives with a set of completion requirements to be fulfilled before moving onto the subsequent stage.

Project stakeholders (the client and Iken) work collaboratively to sign off at each stage.



Understanding the high-level architecture

The following is a high-level overview of the technical setup of the Iken application:



Customer Excellence Commitment

A clearly defined customer journey designed to ensure clients maximise their investment in Iken Cloud

We listen to feedback from clients in our user group, focus groups and account management meetings

We act to improve ROI, support tools, onboarding techniques, project delivery, product offerings, deployment methods and training



Iken Support Commitment



Our clients are at the core of everything we do.

That means when you onboard with Iken Cloud, you'll be fully supported no matter your location or scale of operation – ensuring you get the most from your investment. All of our products are developed and supported in Bristol including 1st to 3rd line support.

Iken Support Desk: The support desk is open 09.00 – 17.30 on weekdays and is contactable via email, Live Chat, the Iken Support Portal or by phone.

Iken Account Management: A dedicated Account Manager who'll arrange regular meetings throughout the year. This ensures clients are up to date with product developments and retain a voice in the future direction of our services.

Client-Centric Products: All our clients are encouraged to raise suggestions for new features and products which support their evolving needs. Our roadmap is published on the Iken Support Portal, allowing you to view upcoming features and updates.

Iken User Groups and online focus groups: Online meetings, giving you the opportunity to discuss and share best practice and common challenges along with tried and tested solutions.

Management Information: Iken's reporting includes multiple search parameters, allowing managers to identify the key data required to help demonstrate the value of their team whilst assisting with strategic decision making.

Availability: The availability we offer is 99.5% during normal business hours (9:00 am to 5:30 pm, excluding bank holidays), except for planned maintenance with an agreed period of advance notice and/or emergency maintenance. Planned and unscheduled maintenance will be carried out outside of normal business hours wherever possible.

Business Continuity and Disaster Recovery

All code and configurations are held in a separate area to our live production systems. In the event of a loss of service to our primary MS Azure location, our established Business Continuity and Disaster Recovery Plan would be enacted, including the deployment of new services and configuration to an alternate MS Azure location within the UK.

Backups of all critical system components are taken at regular intervals and are encrypted using industry- standard encryption technologies.



Offboarding

The first step in the offboarding process is for a plan to be agreed between Iken and the customer to initiate offboarding and complete the associated activities.

This includes extracting the customer's data and shutting down their database once the customer is in a position to cease their use of the service.



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