Customer Relationship Management System

Responder Training Manual

Telephone number: 304-348-2311

Email Address: cwv311@cityofcharleston.org

City of Charleston

CWV 311

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Responder Series Help Sheets

These help sheets will give you step by step directions for different tasks in CWV311.

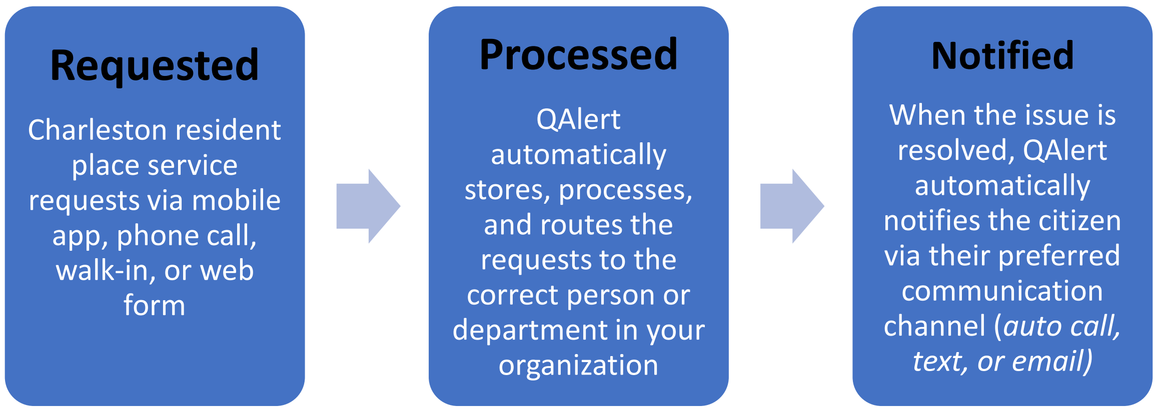
Responder Series Help Sheets (cont.)

CWV311 MISSION

To provide quality customer service to the residents of Charleston, WV and ensure that issues and questions are addressed in a timely manner.

QAlert Executive Summary

Below is a general overview of how the CWV311 customer relationship management system functions. The resident can issue a service request via the mobile app, by calling in (internal staff tools make logging a call quick and easy for staff), or by visiting the web portal.



Entering a call internally

Citizens are calling for one of three reasons: to report something new, check on something already reported, or ask a question. The CWV311 system provides an ease space to log every call in a matter of seconds.

Viewing and Updating Service Requests

Staff responders have a clean, customizable dashboard to view their assignments. Logging in, they will only see requests that they are directly responsible for or have permission to see. Staff will be able to track and update progress on each task within the system.

Customizable views allow each individual to predefine what they would like to see. The view "save" feature allows for quick future access. Finding information is easy for staff, the sidebar knowledge base feature allows staff to search for information about different departments across the city in seconds.

Staff FAQs for Using CWV311

Q. What is CWV311?

A. CWV311 allows residents to alert City of Charleston staff members of various concerns online or via phone or mobile device. The system:

- Automatically notifies appropriate departments and responders of an issue.
- Logs the issue in a centralized database.
- Provides the history of a record and the steps taken to resolve an issue.
- Sends user-triggered updates to citizens on a service request.
- Provides residents with responses to common questions.

Q. Why is the City of Charleston using CWV311?

A. CWV311 will help us perform outstanding customer service by:

- Ensuring that no citizen service request is lost.
- Routing service requests directly to the party responsible for resolving it.
- Providing a record and resolution of each service request through the activities and attachments entered into the system.
- Enabling extensive reporting based on service request types, streets, districts, users, resolution time, and more.
- Assisting in making more data-driven decisions.

Q. What types of calls should be entered into CWV311?

A. Any call from a constituent about a problem that needs to be resolved by the City or a question for the City.

Questions that a call taker are able to answer and do not require follow-up action should be recorded under the appropriate department's "Ask us/General FAQs" service request type. You will need to log and close the ticket.

Calls about ongoing work (i.e. from a vendor or partner organization) do not need to be logged.

Internal services requests from one department to another should also be entered into the system (similar to the way the IT Helpdesk works).

Q. Why do I need to log a question if I am able to answer the question on the phone?

A. Logging questions in addition to issues is very important. City staff will be reviewing the CWV311 to see what types of questions we receive so that we can push needed information out into the community through the website, social media, and community events. For example, if we see through the CWV311 system that we receive a high volume of questions about how to start a new business or what pool hours are, we will be able to tailor the information disseminated to residents online and at events. The goal is to eventually reduce the call load by ensuring that residents have the information they need without having to call the City.

Q. How do I log a question?

A. To log a question, please follow the below steps:

1. In the drop-down list under "Request Type" select "Ask Us/General FAQs" and then select the department related to the question (this may be your department or another department).
2. Enter the question into the comments box.
3. Click "Save + Close"

You do not need to fill in the "where" section for a question unless the question is about a specific location (i.e. a specific P&R center).

Q. What do I do if the call is not for my department, and I <u>do not</u> know the answer, but I know who in the City can answer the question?

A. Transfer the call to that person without logging it into CWV311. The individual who answers the question should always be the one to log the question.

Q. Who in the City will take calls?

A. A new CWV311 Center will act as a central hotline for the City. The City will launch an education campaign to encourage citizens to submit requests throughout online system or call 304-348-2311. Some phone numbers for individual department will be removed from the website and other external materials. However, direct numbers will remain active so all departments will continue to receive constituent calls. The transition to the 304-348-2311 number will take time but should eventually reduce the number of constituent calls received by your department.

Q. Is it mandatory for all constituent calls to be logged?

A. Yes!! The CWV311 system is an important initiative that will significantly improve efficiency and customer service, but it will only work if everyone logs their calls. This needs to be a team effort in which all city staff who take calls or respond to requests fully participate. We appreciate that there will be a learning curve, but we expect staff to reach out with any questions and let us know if more training is needed.

Q. How should I explain CWV311 to the public?

A. CWV311 is a citizen request management system that allows us to handle and resolve your requests for service in a more efficient manner. It allows us to keep electronic records of all service requests and activities from creation to resolution and to improve the way we communicate our progress on your service request.

Q. What if the citizen is calling about a *problem* that is <u>not</u> my department's responsibility?

A. If the constituent is calling about a problem, enter their information directly into the CWV311 system, and it will be routed directly to the individual responsible for taking care of the services request. Let the constituent know that their problem has been reported, and the City will be in touch regarding the progress on the issue.

Q. How does the City of Charleston wish to update residents on their citizen service requests?

A. The CWV311 updates residents about progress on their service request in three ways: automatic calls, text messages and emails. The preferred communication method is email.

Q. What if a resident is hesitant to provide an e-mail address or phone number for updates?

A. Explain to the resident that they can receive progress updates on their service request. Assure them, if need be, that their personal information is not shared with anyone other than those necessary to resolve the issue.

If they do not provide any contact info, please advise them they <u>will not</u> receive an update on progress with their issue.

Q. What if I field a call from a citizen who has called before?

A. Always ask for the citizen's name. As you begin to enter the name, a drop-down menu will appear for you to choose the correct individual. When you do, the rest of the personal information fields will auto-populate. You should request any missing information, especially e-mail.

Q. How are City of Charleston employees notified of CWV311 service requests?

A. CWV311 alerts responders via email of a new service request entered into the system. Responders then need to log in to address the issue, add activity, and close the request. Please remember that all City of Charleston policies apply to service request data.

Responders who have a city phone will be expected to have their city email accessible on the phone so that they can log in and respond to requests in the field. Please contact the IT helpdesk if you need support gaining access to your email on your phone.

Q. How quickly should the City of Charleston staff respond to a citizen service request?

A. A notification of progress should be sent within 3-5 business days. However, if no progress has been made on the issue, please respond letting the constituent know that the request has been received and provide as much detail as possible about when work will begin on the request.

Q. How long do I have to close an issue?

A. You should close all service requests as soon as possible. Department heads and managers have determined a timeframe appropriate for the closing of each request. If you exceed that timeframe, the service request is escalated to a manager.

Q. What happens when I check the box next to Notify submitter?

A. If a citizen has provided an e-mail address or phone number and selected a preferred notification type, CWV311 will e-mail, text, or auto call the individual with the information you included in the comment box.

Q. What if I place my closing action in the Activity Comments field and not the Closing Comments field?

A. Simply go back into the Manage & History tab, select Close and choose Save this activity. However, remember, if you forget to close a service request, subsequent escalations will occur if you leave that request open too long. You cannot go back to change the date of activity. The longer a resolved service request stays open, the longer your average time to close requests of that type will be.

Q. What if a request type is entered incorrectly and I receive a request that should go to someone else?

You can re-route a request by selecting re-route at the top of the request page. Under Users/Groups select the individual or group who should receive the request. If you do not know who should receive the request, you will be able to route it to the CWV311 Center staff with a note saying that you do not know who to route the request to.

RESPONDER HELP SHEETS

These help sheets will give you step by step directions for actions in the CWV311 system.

ACCOUNT AND VACATION SETTINGS

What are settings?

Users can set preferences in QAlert through Settings in the User menu.

Account Tab

- Change your email address
- Enter or change your mobile phone number
- Indicate messaging preference
- Change a password
- Enter a new password twice
- Click Save

General Tab

- Configure the section order
- Set the Activity list to ascending or descending order
- Adjust the timing of the submitter search delay while typing
- Opt to use a submitter's address as the request location
- Restore views to defaults

Call Center Tab

- Display a default tab at request entry
- Set the checkbox above related requests to default to checked to view related service requests first
- Set the search range to a default time period
- Sort request list by priority or status

Vacation Days Tab

- Set a default alternate using the drop-down menu
- Click Add Dates to enter a time period
- Click into the date boxes to select a date
- Click into the Alternate box to choose a user other than your default choice
- Delete any times by clicking on the delete icon that appears on mouse over

What are activities?

These are notes or actions related to how a service request is being resolved. Adding an activity is one of the most crucial things you can do in QAlert. A well-populated activity list allows anyone who needs to have a conversation regarding the issue to have updated information when they need it.

Adding Activity

- Select a service request. Then:
- Click Add Activity
- Type your notes in the Comments field, add files, and/or select a reusable comment.
- Opt to notify the submitter of key information.
- Click Add Activity.

Editing an Activity

- Select a service request. In the history section:
- Click on the activity to edit.
- Make your changes in the Comments field.
- Click Update.

Note: You cannot edit another user's activity.

Closing a Request

- Select a service request. Then:
- Click Close.
- Type your notes in the Comments field or select a reusable comment.
- Opt to notify the submitter, if the box isn't checked by default.
- Click Close Request.

Notes:

- When you close a request, the Close button changes to Re-Open.
- If you re-open a saved request, everyone on the route list, and the submitter, if you choose, receives notification.
- You can continue to add activity to a record without re-opening

Other Actions

- **Re-route** - direct the request to another user.
- **Link -** attach similar or nearby service requests together for easier management.

- **Print -** read service request details, maps, and attachments in a printable view in a new browser tab.

Consider

- You can only edit your own comments.
- You cannot delete any activity.
- When you re-route, in My Service Requests, the request is no longer visible, but in Open and In Progress, you still have access to it.
- Linking creates a master request that shows you a much broader and detailed activity list, depending upon how many requests are linked.

What does it mean to enter a request?

Entering a request means recording the who, what, and where of an issue as the information relates to contact with the public, or as it relates to you personally, or your department.

What Advice

- In this required field, search for a request type by typing in the box, and choose the appropriate item from the results.
  - If a blue box appears, check the prompt/script within to see if you need to relay information or answer specific questions. Enter that information in the comments box.
- If you choose a request type, and more fields appear, those are custom fields. If any have an asterisk, you should complete those fields, as well.

Where Advice

- Type in the street field and choose the appropriate location from the drop-down menu. Or search above the map.
- If this section has auto-populated with the submitter address, you can easily overwrite that information.
- While not required, through the control panel, be sure to enter information here so that the request you input displays on the system maps.

Who Advice

- Start with Find Submitter, searching by name, address, phone, or email, to name a few, to select an existing submitter.
- If there is no matching submitter, click Add New Submitter to manually complete the personal information.
- Ask if the submitter would like to be notified of updates, and note the delivery channel.

Save Options

- Choose Save to immediately route within QAlert and by email to the responsible party.
- Choose Save & Add to route within QAlert and by email, and to add another request from the same submitter. (You won’t have to complete the Who section again.)
- Choose Save & Close if you address the issue while entering it. The request will be relayed as closed to the responsible party, so no email notifications will be sent.

What does it mean to respond?

If you are a person to whom a service request is routed, you are a person expected to help work requests of that type to closure.

First

- Log in to QAlert.
- Select a request to work with by clicking on its line in the list.

Second

- Review the details of the request in the who what, and where sections.
- Review the entries in history section.

Third

- Act:
    - In the history section, add activity to include your action or notes, and close when complete. When you add activity or close, you can choose to notify the submitter of your update.
    - If you need to, re-route the request to another user or group, or link similar requests for easier management. If you'd like a paper copy, click print.
    - In the what section, check for any custom information you may have to add and track as a part of the request record.

What is a notification preference?

A notification preference is the way a submitter would like to be made aware of changes to the record, resolution updates, and closure.

Notification Options

- Email - the most cost-effective and efficient way for updating a submitter. Encourage this option. Any email address can only be used once in QAlert.
- Phone Call to - the submitter prefers a phone call from a staff member to email. If your municipality is using the auto-call option, QAlert will automatically make a call.
- Text Message to - submitter prefers updates by text, which will provide a link to a screen detailing the update. This option is available only if your municipality has chosen to offer it.
- Postal Mail - the most costly and least time efficient notification method because it is labor intensive and offers costs the other options don't. Your organization may prefer that you not offer this option.

Setting

- If you are entering a new request, offer email notifications first and phone second, and check the appropriate box(es) under Notification Preferences in the Who section.
- If you need to adjust a submitter's information, click edit in the Who section header, then select or deselect the box(es) as appropriate.

What is a knowledgebase?

A knowledge base is a centralized repository for information, a database of related information about a particular subject.

Viewing the KB

- Click the information icon to the upper right above the request list.
- You can search by keyword or view articles by category.
- If you are reviewing a request, when you slide out the KB, you will see articles or FAQs associated with the type being reviewed.

Emailing an Article

- Click the information icon to the upper right above the request list.
- Find an article by keyword or category search.
- Below the article you want to send, click Email Article.
- Add the recipient’s email address, if necessary.
- Adjust the message, if necessary.
- Click Send Email.

What is version management?

Version management allows you to compare the changes to different versions of your knowledge base articles and restore a previously published article, if necessary or appropriate.

Reviewing Changes

In QAlert Administration, click Service Request Types, then:

- Select a knowledge base tab.
- Choose an article to review.
- Click the last update at the bottom of the screen.
- If an article has multiple versions, select one from the previous version drop-down menu.
    - You can see deletions marked in red, and additions marked in green.

Restore a Previous Version

- As you are reviewing a previous version, if you would like to restore to live, simply click Restore, then confirm and save.

What is linking?

Linking is the process of attaching related service requests for ease of management. It creates a master request, marked with an asterisk; linked requests are visible and accessible through the request summary.

How do I manage multiple requests?

- Click on a request in your list.
- Click Link in common tasks.
- Define the search filters, then click Search.
- In the list to the left, to select more than one request:
    - Hold the Ctrl key while left clicking requests throughout the list, or
    - Select a request in the list, hold the shift key, and click on another request to select a range, or
    - Click and drag across several request to select a range.
- Link selected requests.

What are the benefits to linking?

Whether you add activity or close:

- Activity added to any of the linked requests is added to the master but master activity is only added to the master list.
- Notification to the submitter of a linked request is noted in that activity list and the master activity list.
- Checking notify submitter on the master request triggers notification to all the linked requests (if turned on). Submitter contacted activity is added to all the linked request records.
- Notification to a single request is recorded on that request’s activity list and the master activity list.

Consider

- Linked requests cannot be closed, linked, or re-routed to other requests, except by taking action on the master.
- The oldest of the linked requests is designated as the master.

What does this feature do?

When you manage multiple requests through the service requests tab, you can add activity and close, change request type and priority, and re-route, while adding a note to each request record.

How do I manage multiple requests?

In the service request tab, from the list view:

- Select more than one request:
    - Hold the Ctrl key while left clicking requests throughout the list, or
    - Select a request in the list, hold the shift key, and click on another request to select a range, or
    - Click and drag across several request to select a range.
- Click Edit in common tasks.
- Choose an action type.
- Type your notes in the comments box.
- Click Save.

You cannot manage multiple requests if master or closed requests are in your list of selected items.

What is a notice?

A notice is a piece of information you need to get out to staff, for a period of time or in a specific moment, as people handle calls or work to resolve requests.

Working with Notices

As a QAlert notices manager, you always see one of the notification icons (bell or triangle) in upper right corner of the QScend menu bar.

To add a notice:

- Click the notification icon, then add in the toolbar atop the slider.
- Add your headline in the title field and opt to make the notice urgent by checking the box.
- Add body text.
- Opt to associate the notice with request types by clicking the gray bar beneath service request types.
- Opt to add a geographic area by selecting an existing map layer or by drawing your own polygon or circle.
- Set the publish date to the current day (default) or to any future day.
- Set the expire date to the day your notice no longer needs to be visible. If you do not set an expire date, your notice will remain forever archived and available for reuse.
- Click Save.

To edit a notice:

- Click the edit icon.
- Make any necessary changes to any item.
- Click Save. This restores the notice as unread for every user.

To archive a notice:

- Click the archive icon. Because you are a manager, this removes the item from everyone's list.

To restore a notice:

- Click the archive icon in the slider toolbar.
- Click the restore icon. This restores the notice as unread for every user

To delete a notice:

- If you do not intend to reuse a notice, or a notice is for a specific time only, be sure to set an expire date. **This is the only way a message will be deleted from your system.**

What are map views?

Areas that display your service requests as markers on a map that help you see patterns and hotspots, and adjust your work schedule.

Maps Tab

In the QScend tab strip, you can filter your requests by date range, status, city, and/or district. Filter your requests by GIS layer, if your organization has them set. Using the map control, you can enhance your search by selecting one or more request types.

Map View

In the Service Requests tab, click Map above the list to the right to see a snapshot of the view you are clicked on. Select a different view and the map will adjust.

Using the map control, you can pan and zoom, search for a particular street, view map layers if available, and change the map type.

Where Section

In the Where section, use the map control to zoom, view GIS layers if available, and change the map type. Drag and release the location marker onto the map; the address details will update with the location of the marker. View a Google Street view by dragging and dropping the person icon over the marker. Return to the map by selecting the back arrow.

What does it mean to print?

Printing will provide you a record of the entire request - from Who, What (private comments, too), and Where to the activity list. A view will open in a new tab, where you can opt to include maps and/or files, and right-click to print using your printer properties.

How do I print?

Printing a Single Request

- Select a request in your list view using the CTRL key and left-click. Then click Print in common tasks, or...
- Click on a request to review the details, then click Print in common tasks.

Printing Multiple Requests

- To select more than one request
  - Hold the Ctrl key while left clicking on requests throughout the list, or...
  - Select a request in the list, hold the shift key, and click on another request to select a range, or...
  - Click and drag across several requests to select a range.
- Click Print in common tasks

What is priority?

Priority is used to identify the speed at which a request must be resolved, or the order in which you intend to work on issues in your list. Priority can be set globally by type or by you per request.

Adjust Priority

For a single request:

- Click on a service request.
- Move the slider in the What section.
- Click Save in common tasks.

For multiple requests:

- In your list, to select more than one request:
  - Hold the Ctrl key while left clicking requests throughout the list, or
  - Select a request in the list, hold the shift key, and click on another request to select a range, or
  - Click and drag across several request to select a range.
- Click Edit in common tasks.
- Choose Change Priority in the Action Type drop-down, then adjust the slider.
- Type in your notes.
- Click Save.

Note: You cannot change priority level on a linked or closed request.

Sort Your List by Priority

- Click on the word Priority in blue header bar once for ascending order (#1first) and twice for descending order (#1 last).

What is re-routing?

Re-routing allows another QAlert user to view information, add activity, notify a submitter, and close a request.

Re-routing a Service Request

- Click on a service request to open.
- Click Re-Route.
- Find a user or group by typing atop the drop-down menu and select. (Service requests can be re-routed to multiple users and groups.)
- Type your notes or insert a reusable comment.
- Click Re-Route Request. Seeing a Re-routed Request
- If you are using the default views, re-routed items are no longer visible in the My Service Requests view. But because you still have access to the item, it is visible in the Open and In Progress view.

What are reusable comments?

Information snippets that you may use over and over again. You can add your own or use a global comment that has been added for everyone's use. Access them near any comments box by clicking the speech bubble.

Inserting

- Click a speech bubble.
- In the sidebar that opens from the right, find the comment you need.
- Click Insert.

Note: You can add as many comments as make sense to the comments box.

Adding

- Click a speech bubble.
- In the sidebar that opens from the right, select Add.
- Type or paste your text and click Save.

Editing

- Click a speech bubble.
- In the sidebar that opens from the right, find your comment and click Edit.
- Make your changes and save.

Deleting

- Click a speech bubble.
- In the sidebar that opens from the right, find your comment, select edit, and click Delete.
- Confirm your action.

Importing and Exporting

- Click a speech bubble.
- In the sidebar that opens from the right, click the settings icon atop the list.
    - Import Comments - Click the Import link, select a file, click open. Keep what you want, delete what you don't
    - Export Comments - Click the Export link to export your personal reusable comments. Rename the file appropriately. Email to other users, as desired.

Save Options for Service Requests

What are save options?

Save options are different ways to process the entry of a service request. Although each one stores the request in QAlert, they are slightly different.

Save

Routes the request in the system, and sends an email notification, to the user(s)responsible for the type chosen.

Save & Add

Routes the request in the system, and sends an email notification, to the user(s)responsible for the type chosen, and re-populates the Who section for another entry from the same submitter.

Save & Close

Routes the request in the system, as closed, to the user(s) responsible for the type chosen. But because the issue is resolved, **QAlert does not trigger any notification email.**

Where is the search?

To find specific service requests that you can work with, use the search atop the list area.

What can I search?

Use the search box to quickly search for the following:

- Request types
- Streets
- Service request ID numbers
- Request comments, private notes, and activities Enhance your search and create more detailed, segmented views of the requests routed to you, using criteria in the search drop down including:
- Requests for other people who are routes on the same types as you
- Request status
- Specific service request types
- Address number range, street, city and/or geographic areas
- Priority
- Submitter name, email, phone, and Twitter handle
- Escalation that has or has not happened, and within a certain period

Searches as Views

- Click the arrow to the right of the search field, and all the search criteria options appear.

- Complete a search and QAlert will remember the criteria when you are sure you have what you need, expand the window, and click Save as View. Consider You can search for more than one type. Set new views to include multiple types.

Selecting multiple items

If you're linking, managing multiple requests, or printing several for the day's work, you can select multiple items in three different ways.

- To select several non-consecutive requests, use the Ctrl key and mouse click each request.
- To select several consecutive items, use the click and drag feature.
- To select a range, use the Ctrl key and click first item, then use the Shift key and click the last item

What are status levels?

A status level indicates where a service request is in the resolution process. As a responder, you see the issues requiring attention - open and in progress - first.

Open

Green ID numbers mean that a service request has been entered into the system and is OPEN. These are tickets awaiting attention and action.

In Progress

Blue ID numbers indicate that a service request is in the process of being resolved – IN PROGRESS. At least one staff member has reviewed the details and taken some sort of action by adding activity.

Closed

Red service requests have been CLOSED. Generally, that means that a staff member has reviewed, worked on, and resolved the issue for the submitter.

What is History?

History is the ongoing record of actions, notes, and files. The area displays only when you are reviewing an existing request, and by default, at the top of the screen. That can be adjusted in Settings in the User Menu.

Activity List

- By default, the list displays oldest to newest, but that can be adjusted in Settings in the User Menu.
- When viewing oldest first, you will see one or two activities when you first review a request - Created (because it was entered) and perhaps Submitter Contacted (if email notification is on).
- When you notify a submitter of an action, the immediately following entries indicated QAlert's action.
- Activities that you enter, if QAlert is configured to allow it, can be edited. No activity can be deleted and you cannot edit another user's activity.
- You'll notice a paperclip on an activity that has a file associated with it. You can view the file larger and/or delete.

Options

- **Show System Activities,** such as printing and notifications.
- **Accept Twitter Comments** appears in the list if a request has been generated through a tweet. It is enabled by default.
- **Show Linked Activities** appears when a request is a master. It can be toggled off, but is reset each time a request is viewed.

What is What?

The What section contains the reason for the contact with your organization, including the request type, comments, private notes, priority, knowledge base, prompts and scripts, custom fields, and files. Responders see this section as they review a service request and as they enter a service request.

Responding to a ServiceRequest

When you review an existing request, the type and priority are already noted.

- There may be information in comments and private notes that may help you resolve the issue faster.
- Below those fields you may see images or files uploaded by a submitter.
- If there is a number next to Knowledge Base in the section header, you can click to review articles relating to the type.
- You can edit any field in the section.

Entering a Service Request

When you add a new service request, the What section is empty.

- As you choose a type (required) you may see prompts and scripts and knowledge base articles appear. These may help you complete the comments and private notes fields. You can insert reusable comments in either field.
- You may also see custom fields display between the comment areas and the files section. Complete them as required.
- Add files that may be important to have in the record.

What is Where?

This is the information about the location of an issue. While not required, this section should always be completed for faster resolution, mapping, and reporting.

Responding to a ServiceRequest

Information about the location of the issue displays in the Where section. You can edit any field and view GIS layers. Remember to save changes.

Entering a Service Request

To choose a location:

- Type in the street or cross street fields to search for a street. As your results narrow, click on the desired entry in the drop-down menu. Or...
- Search above the map and choose an item from the results.
- Moving the location marker will update the address details automatically.
- Depending upon your organization’s configuration, the submitter’s address may or may not be the default request location. This can be adjusted in Settings, General tab.

Consider

- When your municipality has GIS overlays installed, clicking on the location marker will give you a variety of information, as well as a copy link you can use to paste data in the comments box of the What section.

What is Who?

This area contains personal information of the submitter, such as name, address, contact information, and notification preferences.

Responding to a Service Request

When you review an existing request, some submitter information and notification preferences may already be noted.

- The edit icon in the section header allows you to change any field. **Click save after making any edits**.
- Click remove to clear submitter data and/or find or add a new submitter.
- You may see custom fields in the Additional Information area of the Who section, with or without data, and you may see a Resend Password link if your organization accepts citizen accounts.

Entering a Service Request

When you enter a new request, the Who section displays Find Submitter and Add New Submitter.

- Use find submitter to see if a submitter's personal data exists in your system. Choose the appropriate person.
- If no choices are returned, click Add New Submitter and complete as many fields as you can, including notification preferences.
- Email is the preferred notification preference, followed by phone. Text messaging is only available if activated by your organization.

What are files?

Files are typically images, such as jpgs, and documents, such as PDFs. They are anything related to a request that enhances a record

Adding

- When working on a request, add an activity in common tasks. Click Add Files, browse to select a file from your computer, and click open. Add an optional comment, then click Add Activity.
- When entering a request, you can add files in the What section.

Deleting

- Hover over an uploaded file and click delete.
- Confirm your action.

Consider

- Files in the What section are generally uploaded during the request entry process, while files in the History section are generally uploaded as a request is being resolved.
- Hovering over an uploaded file displays a callout containing the file's details (user who uploaded, date uploaded, file size, file name).

What are channels?

A channel is the way a submitter can communicate with QAlert - Web form, phone call, smartphone app, text, tweet, and email. As a user, you can add a Twitter account or email address to QAlert to provide additional ways of receiving requests. Be sure you use specially dedicated accounts for cleaner use, such as department Twitter or email accounts.

Setting up Twitter

- In the Tools menu, go to Incoming Accounts.
- Click Add Twitter Account.
- Click Authorize.
- Enter your twitter name and password.
- Click Authorize App.

Setting up Email

- It is best to work with your network administrator to be sure all the properties are correct.
- Click Add Email Account and fill in the required fields. Click save.

What are notices?

A notice is a piece of information that you need to know as you work in QAlert. Every user sees notices posted by administrators, or designated managers of the feature.

Viewing Notices

- **To view notices,** click the bell icon for general messages, or the triangle with an exclamation point for urgent ones, in the upper right of the QScend menu bar.
  - Urgent notices appear in yellow atop the list.
  - General notices always appear below.
  - A solid green marker to the right of each notice indicates that it hasn't been marked as read.
  - If the globe icon is green, the notice relates to a geographic area. Click to view a map.
  - If the list icon is orange, the notice relates to specific service request types. Click to view related types.
- **To mark a notice as read,** click the blue bell icon.
- **To hide a notice from your view,** click the archive icon. **You cannot undo this.**
- **To see a notice's effective dates,** click the yellow clock icon.
- **Search** for any notice in your list using the field below the slider title.

Notices and Request Entry

- If you are entering a request and choose either a location or a service request type for which a notice has been posted, a red dialog box will appear in the upper right corner to encourage you to review existing messages.

What is a view?

A view is a way of looking at data. In this case, it is a way of looking at the service requests assigned to you in different ways. The default views are My Requests, Open and In Progress, Escalating Soon, and Closed.

Adding a View

- Click Add View at the bottom of the navigation area.
- Give your view a name and description.
- Choose from the available criteria.
- Click Save as View.

Editing a View

- Click the edit icon of the view you need to adjust.
- Make the necessary changes to the name, description, or criteria.
- Click Save Changes.

Deleting a View

- Click the edit icon of the view you need to adjust.
- Click More... at the bottom of the search box.
- Click Delete, then OK to confirm.

Ordering Views

- Simply drag and drop the views into the order you would like to see them.
- The view at the top of the list will be the first one you see when logging in or switching to the tab.

Viewing Request Types

- To view parent level requests, click Request Types atop the navigation area. Click forward to view sub-types.
- This view cannot be saved as a user preference.

What is this?

The Service Requests tab is the area of QAlert where users who respond to and add service requests do their work.

Common Tasks

- **When you first enter the tab**, the actions in common tasks are the ones you need right away - add, edit, delete, and print.
- **When you add a new request**, common tasks adjusts to show save, save and add, save and close, and clear form.
- **When you review a request,** common tasks adjusts to show save, add activity, re-route, close, link, print, delete, and add request.

Views

- A view is a way of looking at data, a way of looking at the service requests assigned to you in different ways.
- My Requests, Open and In Progress, Escalating Soon, and Closed are the default views. These can be edited and deleted, as well as restored through Setting in the User Menu.
- You can add any custom view that you wish, as well as edit and delete your custom views. These cannot be restored.
- You can order your views any way you like by dragging and dropping.
- By clicking on Request Types, you can see the parent types and sub-types you are responsible for. You cannot save this view as a preference, and your view is reset each time you enter the tab.
- You can add a custom view whether you are seeing your views or request types.

QAlert

Ultimate Cheat Sheet

Effectively Managing Service Requests

Log In

Review your requests in a list or on a map, and assess status and order of work.

Open

In Progress

Closed

Select a Request

Click a request ID number, choose a view, or search above the list.

ID	Request Type
11336	Litter Cans Damaged/Full
11870	Missed Collection - Garbage
11032	Junk and Debris (not at curb)

Take Action

Use common tasks to take the most appropriate action and comment.

- **Back** – Return to your request list
- **Save** – Save any edits you make to the record
- **Add Activity** – More than 1 step? Note what you've done
- **Re-Route** – Work with another employee on an issue
- **Close** – Finished? Note what you've done
- **Link** – Link multiple calls about same issue
- **Print** – Get a paper copy of the whole record
- **Delete** – Permanently delete a request
- **Add Request** – Add a new request

Click speech bubble to add a reusable comment.

Don't see one that applies? Click the Add icon to create one.

GET INTO THE KNOWLEDGE ZONE

QAlert™

Tips & Tricks for Working in the Service Request Tab

Get Wise! Personalize!

See your requests in a list or on a map through a variety of default views or create a custom view from scratch. Drag your views up and down to re-order the list to your preference.

In Settings, you can personalize:

- The section order of the request entry and request details screens
- The order of the activities history
- The delay before the submitter drop-down menu appears
- Whether the submitter address automatically populates the Where section
- Your "vacation" days and your route alternate.

Insert Here, Here, and Here

Create reusable comments, personal and accessible only by you, that you can use over and over anytime you add activities or comments.

Click any green speech bubble to access the slider to insert one or more comments. Once the slider is open, you can also add, delete, and edit your comments.

If you've set up quite a few comments, don't strain your eyes scrolling through the list. Search any word to find what you need.

NOTE: Organizations can set up GLOBAL reusable comments for everyone to use. You'll know these because you won't see an edit option beneath them.

Get More Done at Once

Take action on more than one request at once by using your control key and mouse click to select one or more items in your list. If all the items you want to manage are sequential, click and drag to highlight all the requests you want to work with.

Once you select requests, click Edit in common tasks to adjust the request type, add activity, close, re-route, or change priority. Choose an option, add a note, and save.

Your comments will appear in the history list of every request you selected, and others on the route list will receive the action update notification via email.

What's Next for You & QAlert?

It's in There!

Access QScend Academy right through your control panel by clicking on the logo in the upper righthand corner.

You'll see important subscriber information highlighted on the next screen. Access all the QAlert how-tos under Subscriber Login, then QAlert Instructional Videos.

You also can access QScend Academy directly at academy.qscend.com, and you'll need to log in. Write in your organization's username and password from your activity guide to keep it handy here.

Username:

Password:

Coming Soon - Your Power Booster

Within a few days of your learning session, your instructor will send you a link to complete the last piece of your training.

This spaced practice, which assumes that you'll forget some of what we went over in class, will strengthen your learning and recall for when you return to the QAlert control panel.

Complete this online class and you'll receive a certificate to show off your accomplishment.

Advanced Reporting & Certification

Eventually, you'll want to take advantage of all the data collected in QAlert. Learn how to work in the reporting section and create reports to review the exact stats you need with our online class.

This in-depth, self-paced course and guide requires you to complete exercises and build reports so that you gain a thorough understanding of this feature.

The QScend Learning Team will be standing by to assist you at any point.

Go to academy.qscend.com/reportingcourse to get started. Hit "Take a Break" whenever you need to stop, and watch your email for how to return to where you've left off.

Adding to the Request Record

What is a request record?

These are how a user notes actions related to how a service request is being resolved. A well-populated record allows anyone who needs to have a conversation regarding the issue to have updated information when they need it.

Adding Activity

- Tap on an item in the service requests list
- In the details to the right, tap the activity list icon, then Add Activity
- Tap into the text box to type your message; hold your finger a second to access Reusable Comments
  - You can also tap the microphone key on the keyboard to speak your message
- To trigger an update to a submitter, toggle Notify to on (green)
- Tap Save Activity

Closing

- Tap on an item in the service requests list
- In the details to the right, tap the activity list icon, then Close Request
- Tap into the text box to type your message; hold your finger a second to access Reusable Comments
  - You can also tap the microphone key on the keyboard to speak your message
- To trigger an update to a submitter, toggle Notify to on (green)
- Tap Close Request Re-routing
- Tap on an item in the service requests list
- In the details to the right, tap the activity list icon, then Re-Route
- Select a user from the list (or tap Groups atop the dialog box, then select a group)
- Tap into Add Comments to type, speak or insert a reusable comment
- Tap Reroute to:

Printing

- Tap on an item in the service requests list
- In the details to the right, tap the activity list icon, then Print
- On the next screen, which displays what will print, tap Print in the upper right corner
- If you tap Toggle Attachments, photos associated with the request will appear or disappear at the bottom of the screen

- Select a printer and choose the number of copies
- Tap Print

Consider

As QAlert Mobile relies on a data connection to update the service request record, any activity you enter when offline will be uploaded when your connection resumes

What does it mean to enter a request?

Entering a request means recording the who, what, and where of an issue as the information relates to contact with the public.

Basics of Entering

- Tap New Request to the right of the screen below the map.
- Once you've entered the submitter, request, and location details, tap Save in the upper right corner.

Submitter Details

- Search for the submitter first, in the first field in the upper left corner
    - If a similar user exists, tap on the desired record from the dialog box
    - If no similar user exists, tap manually through the personal information fields, typing in the data
- You can edit the submitter data if something is incorrect by tapping Unlock Submitter Fields
- Turn on and off notification options by tapping the toggle buttons next to email, phone and postal mail (green indicates that notification is ON)
- Tap Additional Submitter Fields to see if there are custom fields available, which may or may not be required

Request Type and Details

- In the upper right corner, tap Choose Type to select an issue
- In the Comments box, type additional information (or if your keyboard has a microphone key, speak the extra details)
- To insert a reusable comment, hold your finger an extra second in the comments box, then insert a reusable comment
- Your details can be included in the main Comments box, or in the Private Notes area (which are only hidden from a submitter until a request is printed for an FOI or Open Records request)
- If there are custom fields associated with the request type, tap More Data to view and complete
- Below the comments, you have options to take a new photo to attach to the record, or select an image from the camera roll

Location

- The iPad GPS service will pinpoint the location of your issue on the map in the bottom half of the screen
    - Tap Select Location in the Issue Location bubble to record.
- To choose a different location, use the search box above the map.
    - Tap Select Location in the Issue Location bubble to record.

Log In

For the first time, or after each time you log out or turn off your iPad:

- Tap the QAlert Mobile icon
- Enter your user name and password
- Enter your domain, without http:// or /qalert (training.qscend.com rather than http://training.qscend.com/qalert)
- Enter a pass code twice Upon waking the app:
- Tap the QAlert Mobile icon
- Enter your pass code

Log Out

Upon waking the app:

- Tap the QAlert Mobile icon
- Tap LOGOUT on pass code entry

After using QAlert Mobile:

- Tap Settings in the upper left corner
- Tap Log Out on the next screen

What Do I See?

When you log in, you will see a map on the top third of the screen in portrait view, your service requests on the left side of the screen, and the details fields to the right.

VIEWING A REQUEST

In the service requests list, blue ID numbers indicate items being addressed (in progress) and green ID numbers indicate items not yet acted on (open). To view requests via Views:

- In common tasks, click views. The standard views are:
  - My Service Requests: Requests routed to you
  - Open and In Progress: Requests routed to you and those you've re-routed.
  - Escalating Soon: Requests that will escalate in next 7 days.
  - Closed: All closed service requests

To view a request, tap on any line of data in the request list.

- A pushpin will display on the map
- A service request (the one you've chosen) will be highlighted in gray
- Submitter details will be visible atop the right-hand column
- The request history (activities) will be visible in the bottom right corner
-

To get directions to the location of the request being viewed:

- Tap the traffic sign icon in the address line
- Apple Maps will provide directions to the issue's location

What You Can Do Next

- At the top of the screen, above the map you can search for a location or tap Find Near Map Center to view all requests nearest your location.
- Below the map, you can:
  - Search – tap Search and the options box will appear with several filtering options. You can change as many variables as you wish.
  - Requests – tap here and or pull down on the column to update the requests pulled into your device.
  - New Request – tap here to enter a new service request
- By tapping the Activity List icon next to the priority indicator, tap:
  - Re-Route – to send the request to another user or group
  - Add Activity – to record action taken on a request
  - Close Request – to indicate when and how the issue was resolved
  - Print – to re-route a request, add an activity, close a request, or print the details
  - Edit – to make changes to the request details
  - View Photos – when there are attachments to the request record

What Is a View?

A view is a way of looking at data. In this case, it is a way of looking at the service requests assigned to you in different ways. The default views are My Service Requests, Open and In Progress, Escalating Soon, and Closed.

Defining Default Views

- My Service Requests - All requests routed directly to you
- Open and In Progress - All requests routed to me as well as those requests you've re-routed to another user
- Escalating Soon - Requests that will escalate in the next 7 days
- Closed - All closed requests
- Switching Views
- Below the map, you can change the views by clicking Views.
- Choose your preferred view, and the request list will adjust.

Managing Views

You can manage default views, add a custom view, and reorder views ONLY through the QAlert control panel.

- You can add any custom view that you wish, as well as edit and delete your custom views. These cannot be restored.
- You can order your views any way you like by dragging and dropping.

What photos are in a record?

Submitters can add photos to a request. A user can also add “before and after “photos to a record.

Viewing

- After tapping on the request, click the activity list icon
- If View Attachments is visible at the bottom of the list, tap to review pictures (if you do not see the option to View Attachments, there are no images associated with that request)
- Tap on a photo to view it larger, and tap Back in the upper left when finished
- Tap Done in the upper left when finished viewing attached photos

Attaching Photos to Existing Request

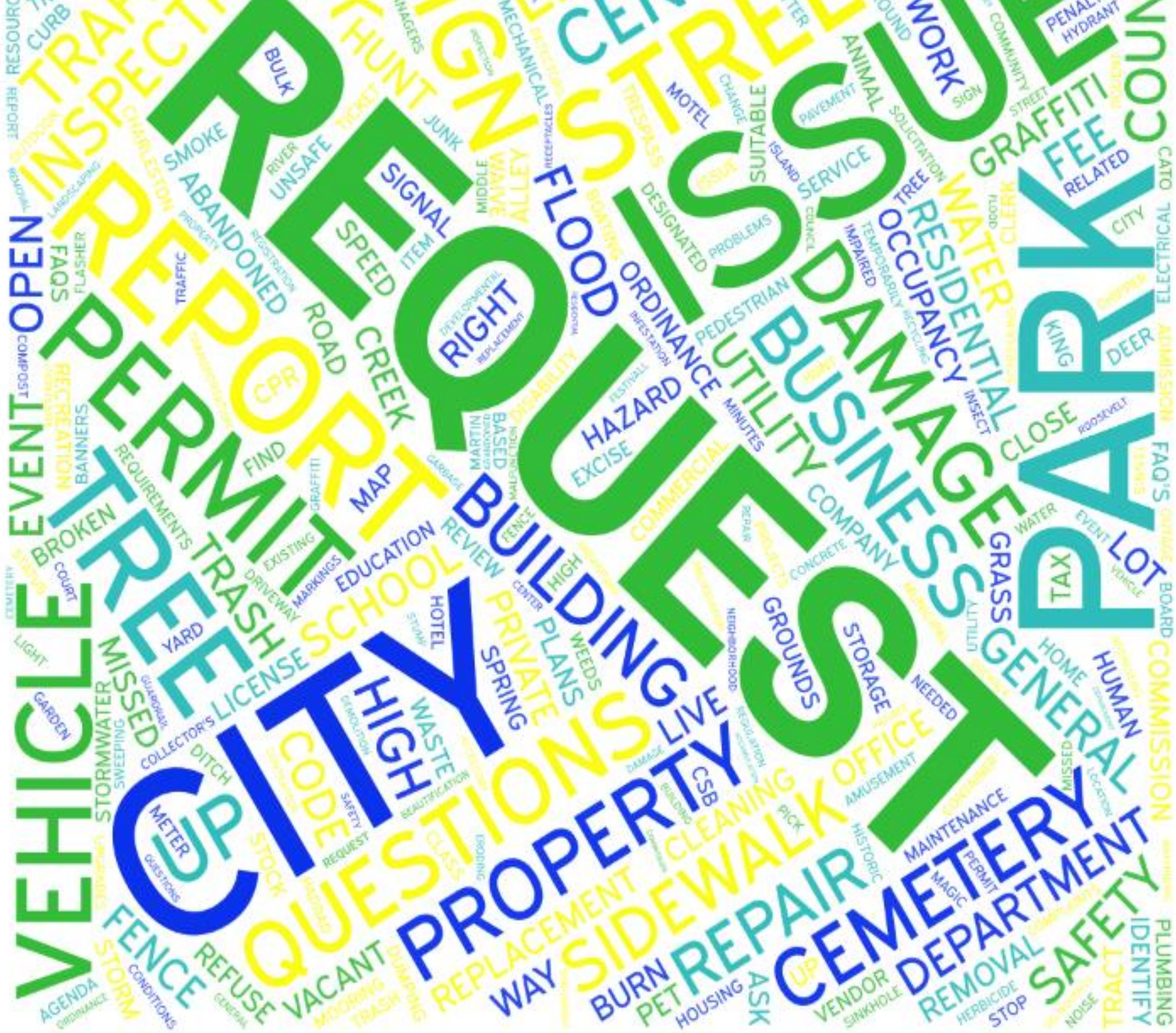
- After tapping on the request, to add photos, tap Edit activity list icon
- In the middle of the right side of the screen, tap the Camera to take a photo and attach, or tap Camera Roll to choose an existing photo
- Tap Save in the upper right corner

Removing Photos from Existing Request

- After tapping on the request, select the activity list icon and then View
- Attachments
- Tap Edit in the upper right corner
- Select one or more images
- Tap the Trash icon in the upper right corner to delete, and confirm
- Tap Done in the upper left corner to return to the service request screen
  Or...
- After tapping on the request, select the activity list icon and then Edit
- Tap the photos attached link
- Select Edit in the upper right corner
- Select one or more images
- Tap the Trash icon in the upper right corner to delete, and confirm
- Tap Done in the upper left corner to return to the service request screen

Attaching Photos to New Request

- Tap New Request to the right of the screen below the map
- In the middle of the screen, tap the Camera to take a photo and attach, or tap Camera Roll to choose an existing photo
- When finished entering the details and comments for the new request, tap Save in the upper right corner


REQUEST
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PARK
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QUESTIONS
PROPERTY
SIDEWALK
CEMETERY
BUILDING
BUSINESS
DAMAGE
CENTER
INSPECTION
TRAFFIC
VEHICLE
DEPARTMENT
REPAIR
SCHOOL
LIGHT
TAX
LINE
COUNCIL
PICK
RESIDENTIAL
WATER
OCCUPANCY
FLOOD
UTILITY
GENERAL
SAFETY
COMMISSION
REPLACEMENT
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CODE
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HILL
MEETING
RIVER
HUNT
ORDINANCE
HAZARD
TRASH
FENCE
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CLEANING
OFFICE
PRIVATE
VACANT
WAY
BURN
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EDUCATION
REVIEW
PLANS
SPRING
WASTE
FAQS
MAINTENANCE
REMOVAL
IDENTIFY
PLUMBING
TRACT
LOT
BOARD
COMPANY
CLOSE
GRASS
HUMAN
HOME
DEER
KING
CITY
ELECTRICAL
RELATED
PENALTIES
HYDRANT
DISTRICT
FLASH
WORK
DRAIN
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BRICK
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MIRRORS
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POLLUTION
ENGINEERING
SCHOOL
WORK
GRAVEL
TRIMMING
CURB
RESOURCES
STORMWATER
MISSED
BROKEN
BANNERS
REQUIREMENTS
YARD
DRIVEWAY
MAP
FIND
CPR
EXCISE
COMMERCIAL
PEDESTRIAN
SERVICE
ANIMAL
PLAYGROUND
MOTEL
TRESPASS
SUITABLE
DESIGNATED
MECHANICAL
ALLEY
UNSAFE
JUNK
TICKET
BULK
DITCH
METER
STOCK
REFUSE
STORM
AGENDA
HOUSING
ASK
VENDOR
SINKHOLE
HERBICIDE
STOP
NOISE
AMUSEMENT
HISTORIC
CSB
COLLECTOR'S
CONDITIONS
MAGIC
PERMIT
NEEDED