Customer Relationship Management (CRM)
-Employee Training Manual-

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Overview

GO*Request* software is a Customer Relationship Management (CRM) system designed for Cities Counties and other government agencies. It is a web based support application that provides citizens with access to information about your agency's services 24 x 7, while providing staff the tools they need to manage the resolution process. The system that your agency will be using has been customized to meet the specific support needs.

GO*Request* allows you to efficiently enter and track citizen service requests. Requests can be entered by employees when a support issue occurs on the phone, at the counter, by email, or on the web. Citizens can also enter their own service requests and have the ability to track them.

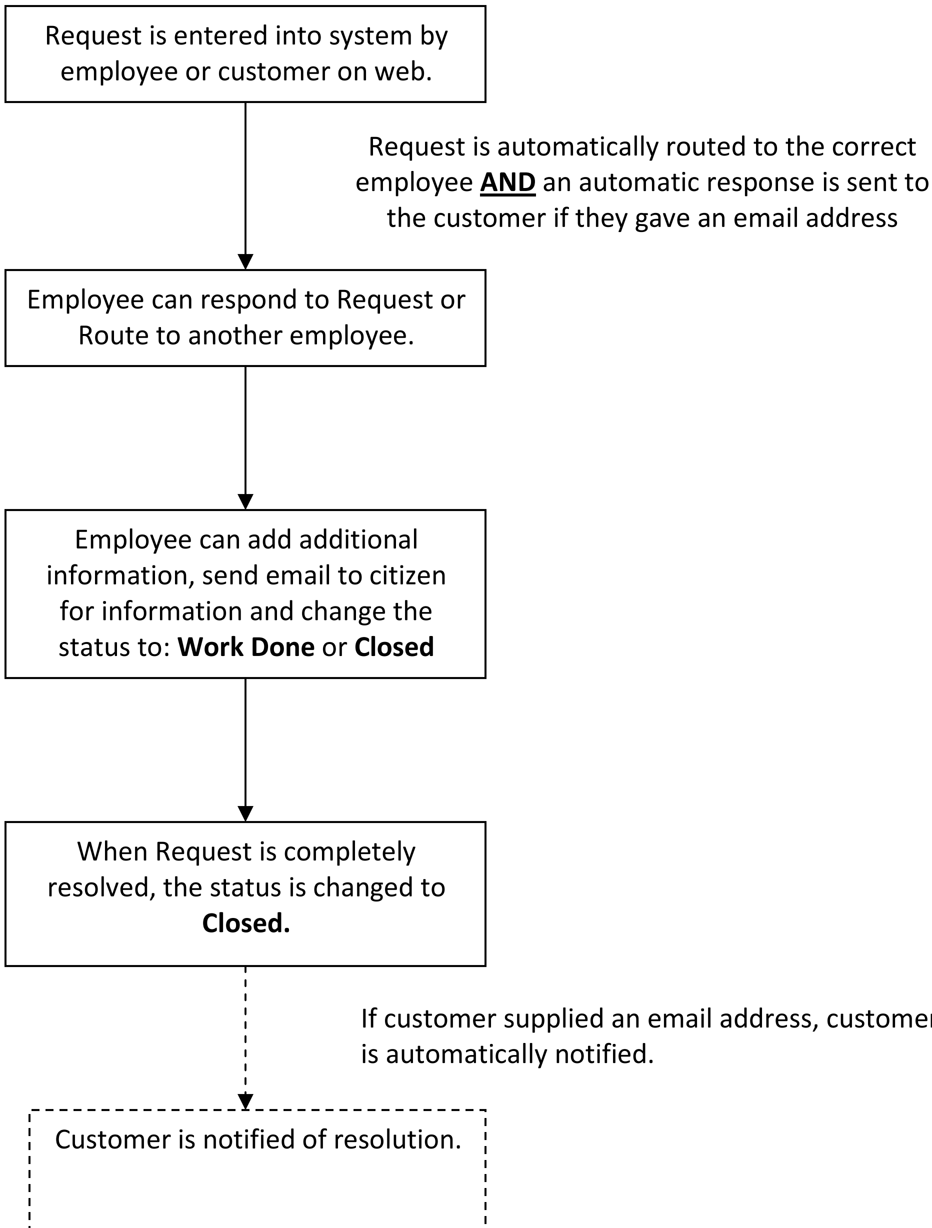
When a new request is entered into the system, the software automatically routes the request to the appropriate individual in the organization. The employee receiving the request will receive an email notification to let them know they need to resolve a request. They may re-assign it to another employee or let the system re-route the request automatically by selecting a new topic.

Each user of the system has been assigned a user name and a password. Sign into the system through your web browser. The first screen displayed is the Request Log with a summary of the customer support requests assigned to you. Based on your permissions, you may be able to see requests for others in your organization. Clicking on a request allows you to view detailed information and to update the information.

Each request in the system has a pre-assigned "Expected Close Date." This close date is given to the customer. The day before the request is due the system will send an email reminder to the employee. On the close date, the request should be closed, however, if it is still open, you will receive another email reminder. These notifications are here to make your job easier and to ensure that the expectations of the customer are met.

When you are done with a support request, you will set the Status of the request to ***Work Done*** or ***Closed.*** The request will then be removed from your summary log. If there is an email address for the customer of the request, the customer will receive an email as well, to let them know how the request was resolved. The customer can then fill out a Customer Satisfaction Survey to rate their experience with the organization.

Request Work Flow



Signing Into the System

Sign into the system by bringing up the web browser and going to the location:
http://user.govoutreach.com/CedarHill/employee

It is recommended that you add this location to your **Favorites** from your browser.

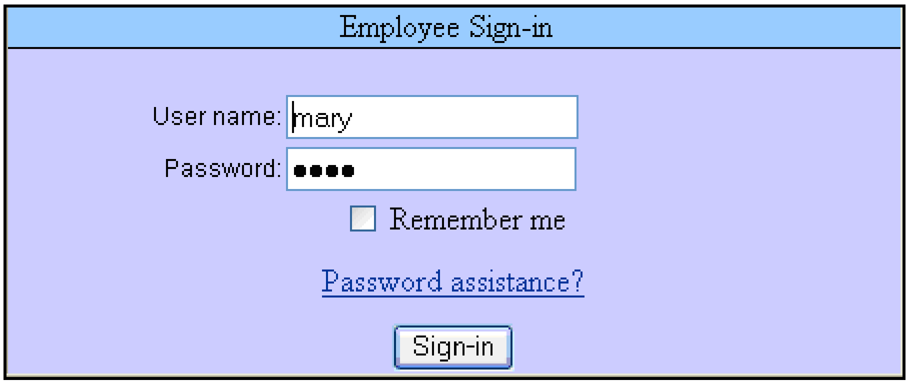


Figure 1 – Employee Sign-In Screen

To Sign-in to the system:

1) Enter your **User Name** and **Password** and press the **Sign-in** command. Do not share your username and password with others.

If you are using a computer that is not shared with others, you can mark the checkbox **Remember me** before pressing the **Sign-in** command. The next time you visit the Employee Sign-in screen, the system will have your User name and Password filled out for you.

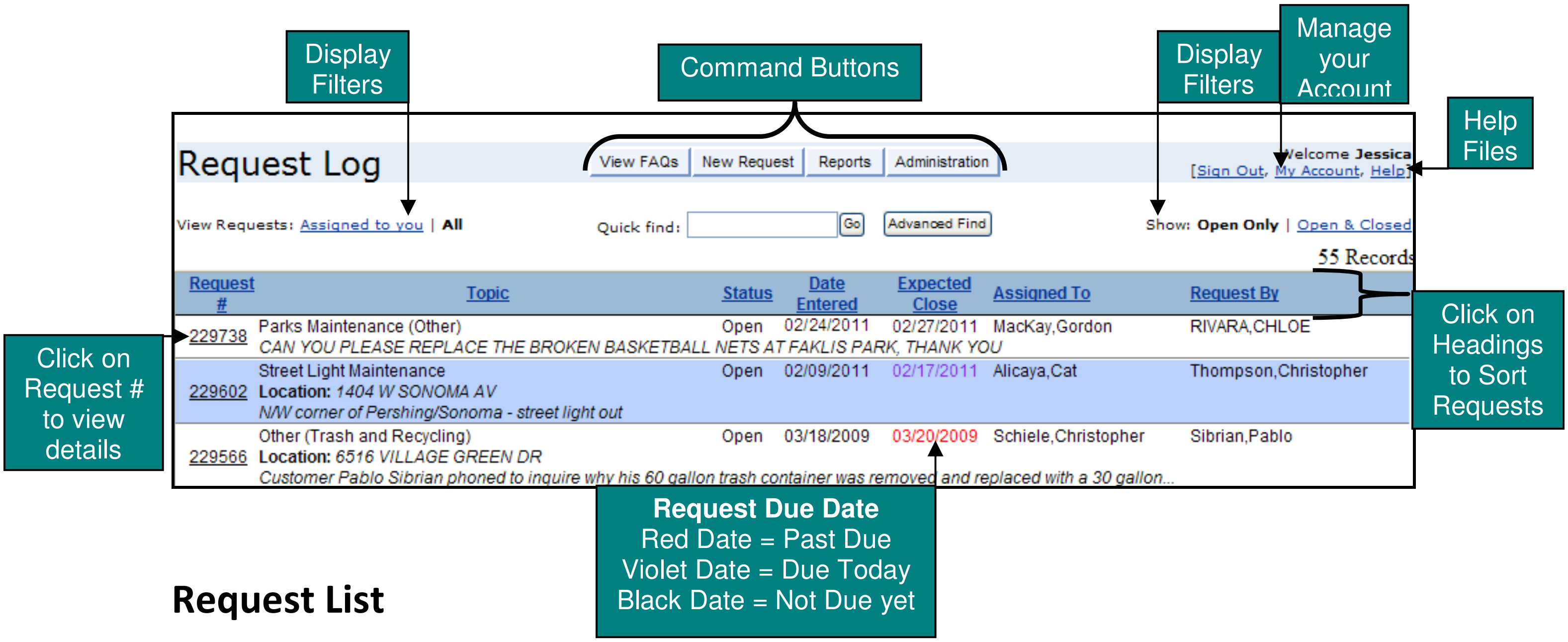
Forgot your User Name or Password?

If you forgot your sign-in information, click on the link "**Password assistance?"** Enter your email address and press the **Send me my sign-in information** command. You will then be sent an email with your user name and password.

Figure 2 – Password Assistance Dialog Box

Request Log

After signing into the system, the first screen displayed is the **Request Log.** The Request Log is like the Control Panel of your Account to view requests, create new requests, view & create new reports and view FAQs (See **Figure 3**).



Request List

The request list defaults to requests with an open status and are assigned to you. You may sort through the requests by clicking on any of the headings: Request #, Topic, Status, Date Entered etc... to display the heading in ascending or descending order.

Under the "Expected Close Date" heading, two dates appear in RED, which mean the request is overdue. Dates that appear in violet indicate the request is due today. To see detailed information about a request and/or to edit the request, click on the request number.

Display Filters on the Request Log

Display filters change the request view on the Request Log. There are two types of Display Filters, **1) View Requests:** Assigned to you | All and **2) Show:** Open Only | Open & Closed.

View Requests: Assigned to you | All **–** Selecting the **Assigned to you** link will display requests that you own and need to resolve. Selecting the **All** link will display requests assigned to you plus other requests assigned to other employees. Your account is based on permissions assigned by a system administrator. Most employee accounts are set to access all requests assigned to your department.

Show: Open Only | Open & Closed **–** Selecting the Open Only link will display requests with an open status. Open & Closed will display requests with a status of open & closed.

Command Buttons & Other Links on the Request Log

Figure 3 has several other features, which include:

- **Command Buttons**
  - **View FAQs** – Displays the FAQ page on your agency's website as the citizen would view it. Employees will be able to view internal topics[1] on this page as well.
  - **New Request** – Displays a new request screen. When you receive a support call or are approached about a support issue, click on "New Request"
  - **Reports** – Displays reports that are available to you. Typically department managers will gain the most benefit from this.
  - **Administration** – You will only see this button if you have been given administrative privileges. Administration is explained in a separate document. A Help link is provided on the Administration screen.
- **Sign Out** – You should always sign out after each session, especially if you are on a shared computer. When you are signed in to the system, every request you modify, records the changes and attaches your name to it with a timestamp.
- **My Account** – This allows you to change information about your account, such as your user name and password (See **Page 9** for additional details).
- **Help** – This link displays the online help files. It is organized in an Outline format with Topics, which includes this training document.

[1] **Internal topics** are used internally for your agency. There are Internal requests and Internal FAQs. Internal FAQs are informational only for employees to view (Ex. Human Resources benefit info). Internal Requests may include Help Desk or a building maintenance requests (Ex. Computer problems or Light Bulb replacement in office).

My Account Link – Request Log

The **My Account** link is located on the Request Log Screen (**See Figure 3**). This is where you can make changes to your account, including your name, phone number, email address, sign-in and your password information (**See Figure 4** for details).

Delegating Requests – Absent from work

The My Account link allows you to **Delegate Requests** to another employee when you are absent from work. The employee you delegate requests to will receive all requests assigned to you in their Request Log and receive all email notifications associated with your requests.

To delegate your requests, view the My Account link and simply select the appropriate employee from the field called "Delegate Requests to" and hit **Send** (**See Figure 4**). The screen will return to the Request Log and a message will appear at the top of the screen, "*You have delegated your requests to* [*employee's name*] (**See Figure 5**). The employee you are delegating requests to will see a similar message on their Request Log screen. For example, "*Jessica Taylor has delegated requests to you*."

Note: If you are delegating to an employee who is already in delegate mode, your requests will be forwarded to the next employee receiving requests. For example, if you chose to delegate your requests to Sandra, and Sandra is already delegating to Pam, your requests will automatically be forwarded to Pam.

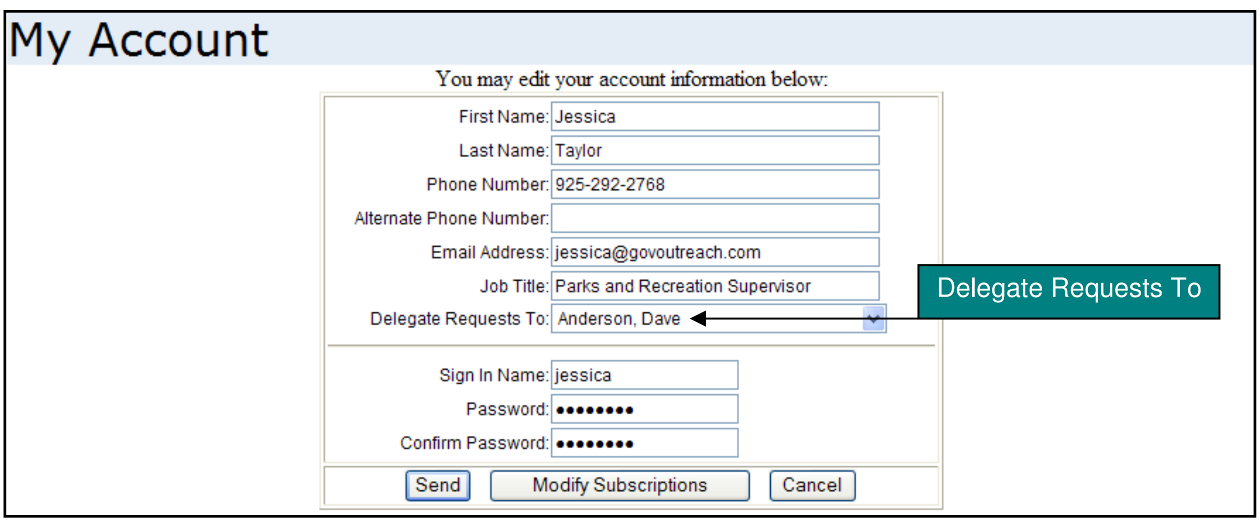


Figure 4 – My Account Screen

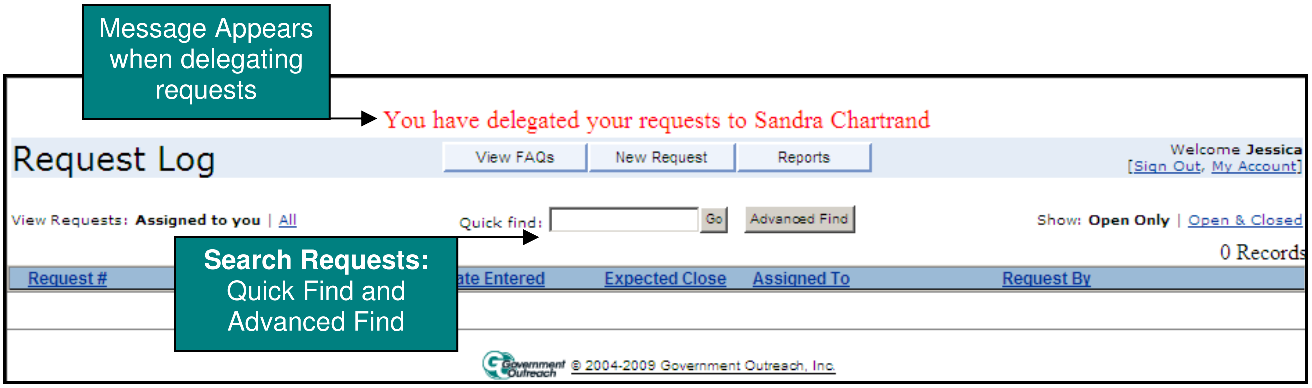


Figure 5 – Delegate Mode

Searching for Requests – Request Log

The **Quick Find** and **Advanced Find** tools are useful search features to find requests in the system quickly (See **Figure 5**).

Quick Find

The Quick Find will search by the address location of the request, the request number, the customer's first or last name or key words in the topic or content of the request. (**Note:** Typing only the beginning letters of the first or last name are necessary for the system to perform a search. For example, typing in the letters 'car' will return names such as Carson, Carey, or Carter. McCarthy will also display as a possible match). The Quick Find field searches on the description field.

Advanced Find

The **Advanced Find** tool is a more powerful way to search for requests. More search fields are available such as the Entered By employee, the Topic, Close Date, Customer Address and phone number, department etc…

To operate the advanced find feature, select the Advanced Find button in the Request Log view. This will display a dialog box (See **Figure 6**). To begin selecting search criteria, select a field from the "Choose Field" column. This will display and activate choices to search, on the right (See **Figure 7**).

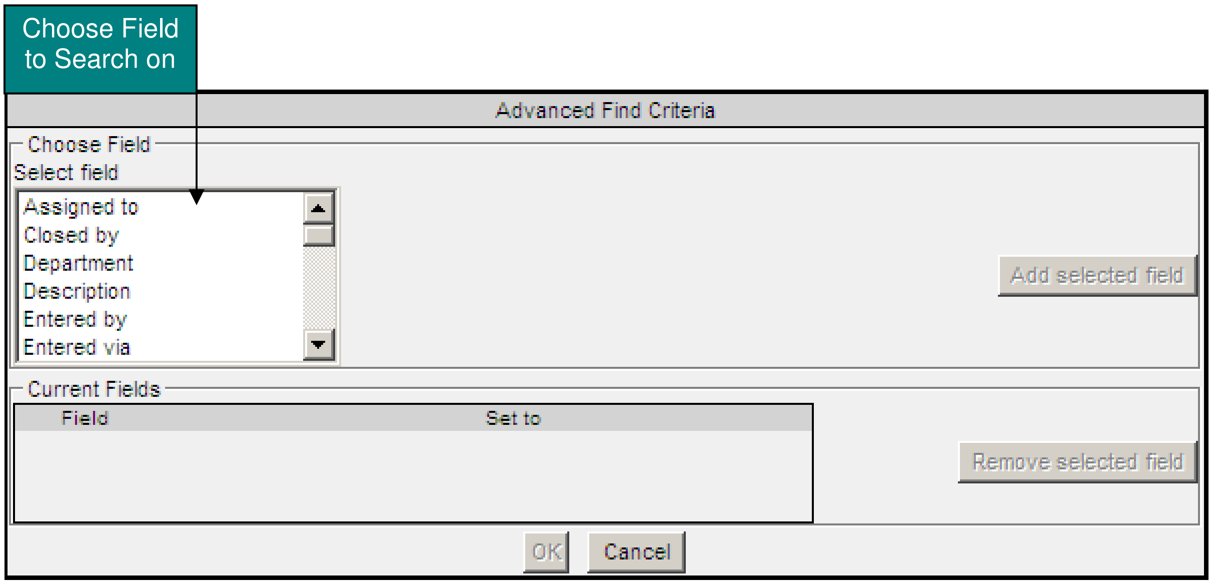


Figure 6 – Advanced Find Dialog Box

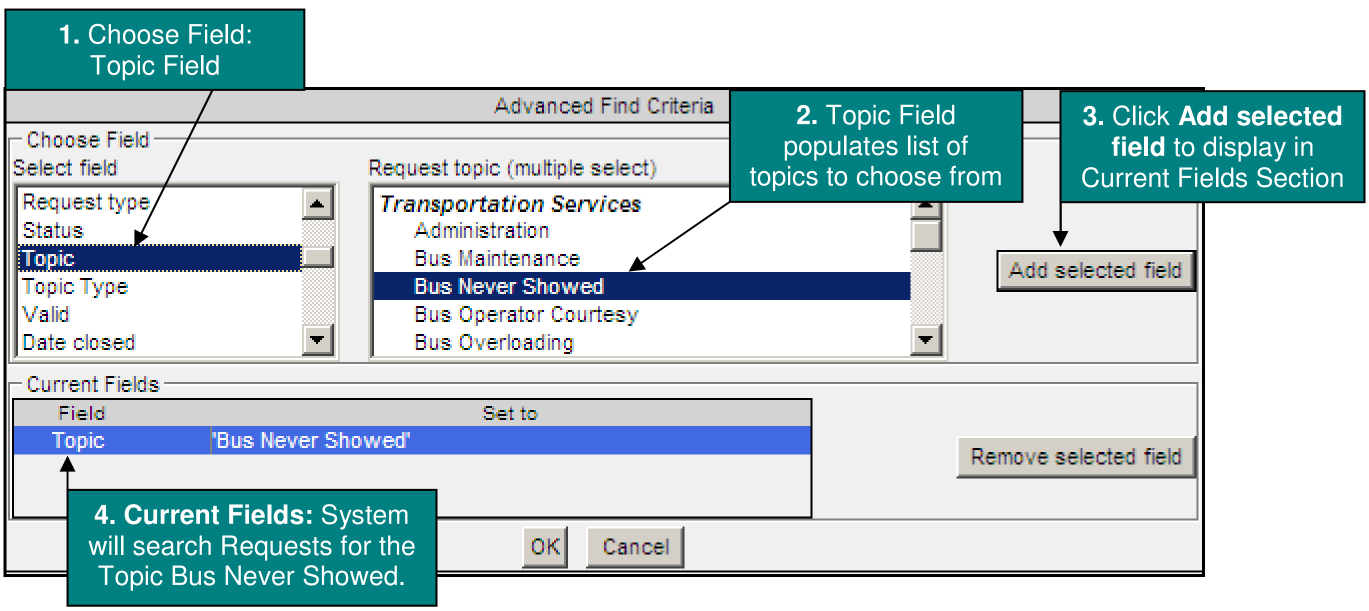


Figure 7 – Adding One Field to the Search Criteria

Figure 7, sets the search criteria for one field. First, select the "Topic" field (from the "Choose Field" column on the left)(step **1**). This will populate a list of Topics on the right (step **2**). In this case, "Bus Never Showed" was selected for the Topic. (**Note:** To select multiple topics at once, hold down the CTRL key). After selecting topic(s), click the "Add selected field" at the right (step **3**), to add this field to the search box. Your search criteria will appear in the Current Fields Section (step **4**).

Click OK at the bottom to view your search results. (**Note:** The system will only return requests you have permissions to access).

Figures 8 & **9** show a search across two fields that will find requests that are "Assigned to You" and requests that are entered in the system "Last Week."

In **Figure 8** the "date" field will display a pick list of dates to choose from. The dates are parameters instead of actual dates (i.e. 2010 for "Last Year") so the date values in the drop down menu can be used again. For example, selecting the date "Yesterday", will always display search results for the day before today.

To remove a field from the search criteria, select the field in the "Current Fields" area and select the "Remove selected field" button.

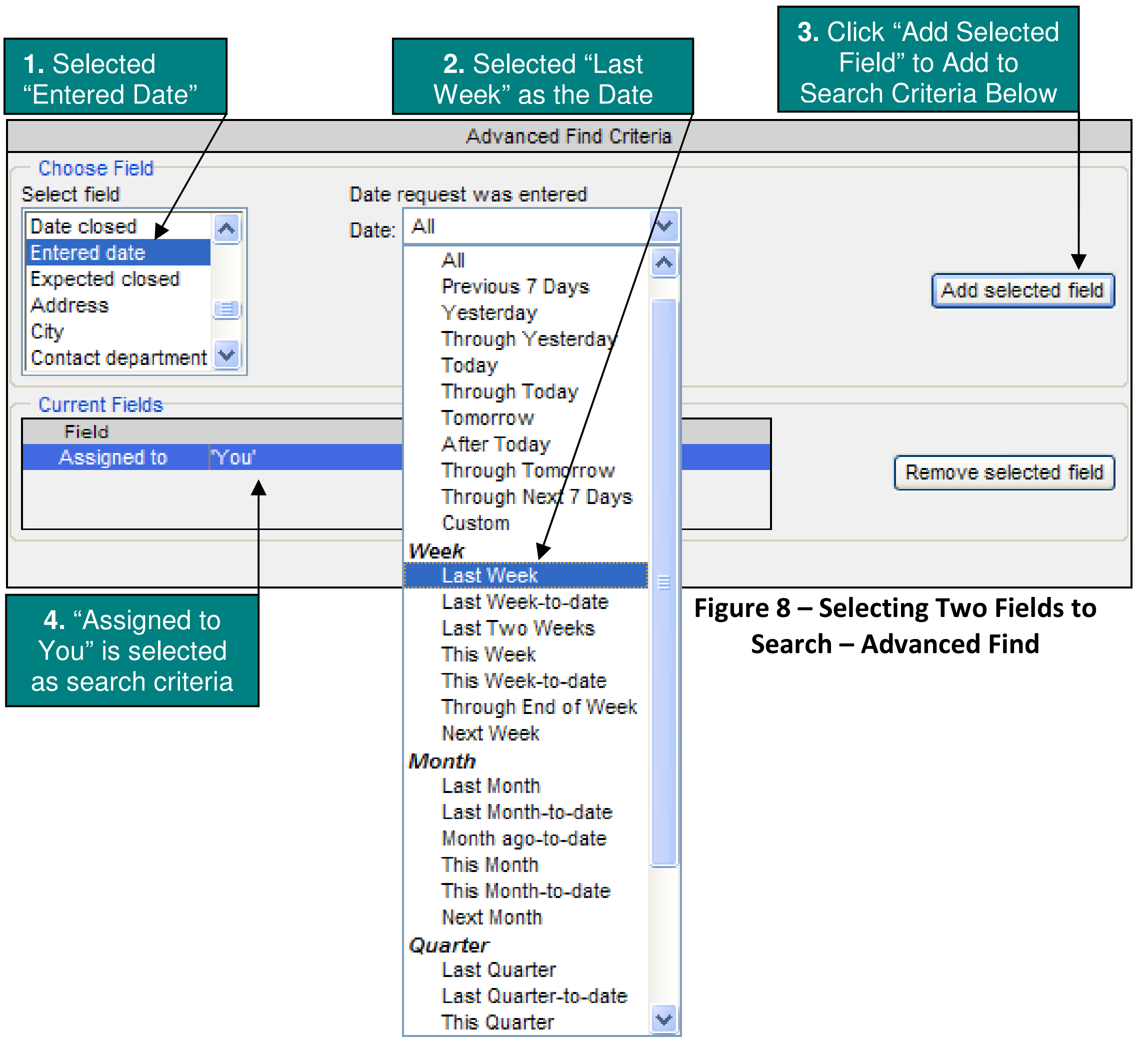


Figure 8 – Selecting Two Fields to Search – Advanced Find

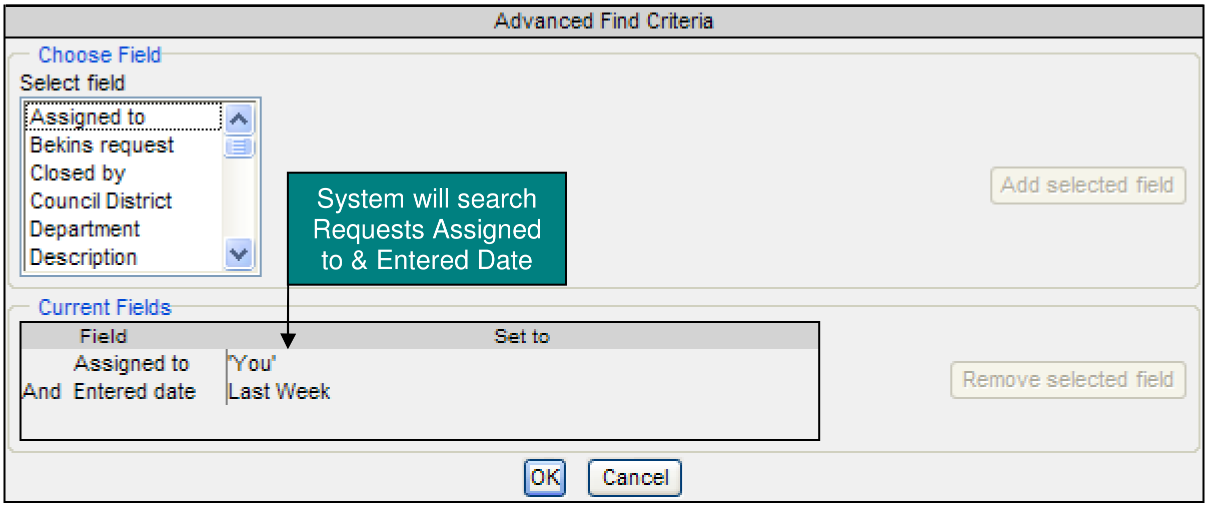


Figure 9 – Search Criteria is Set across Two Fields "Assigned to" And "Entered Date"

Entering a New Request

Overview

The Employee New Request Screen is where employees can enter incoming requests into the system, from a phone call, email, or in person. This screen is divided into three main sections:

1. Customer Contact Information
2. Request Classification
3. Request Description

To view the New Request Screen, simply click on the New Request Command at the Request Log screen. The Request form will then appear, shown in **Figure 10**.

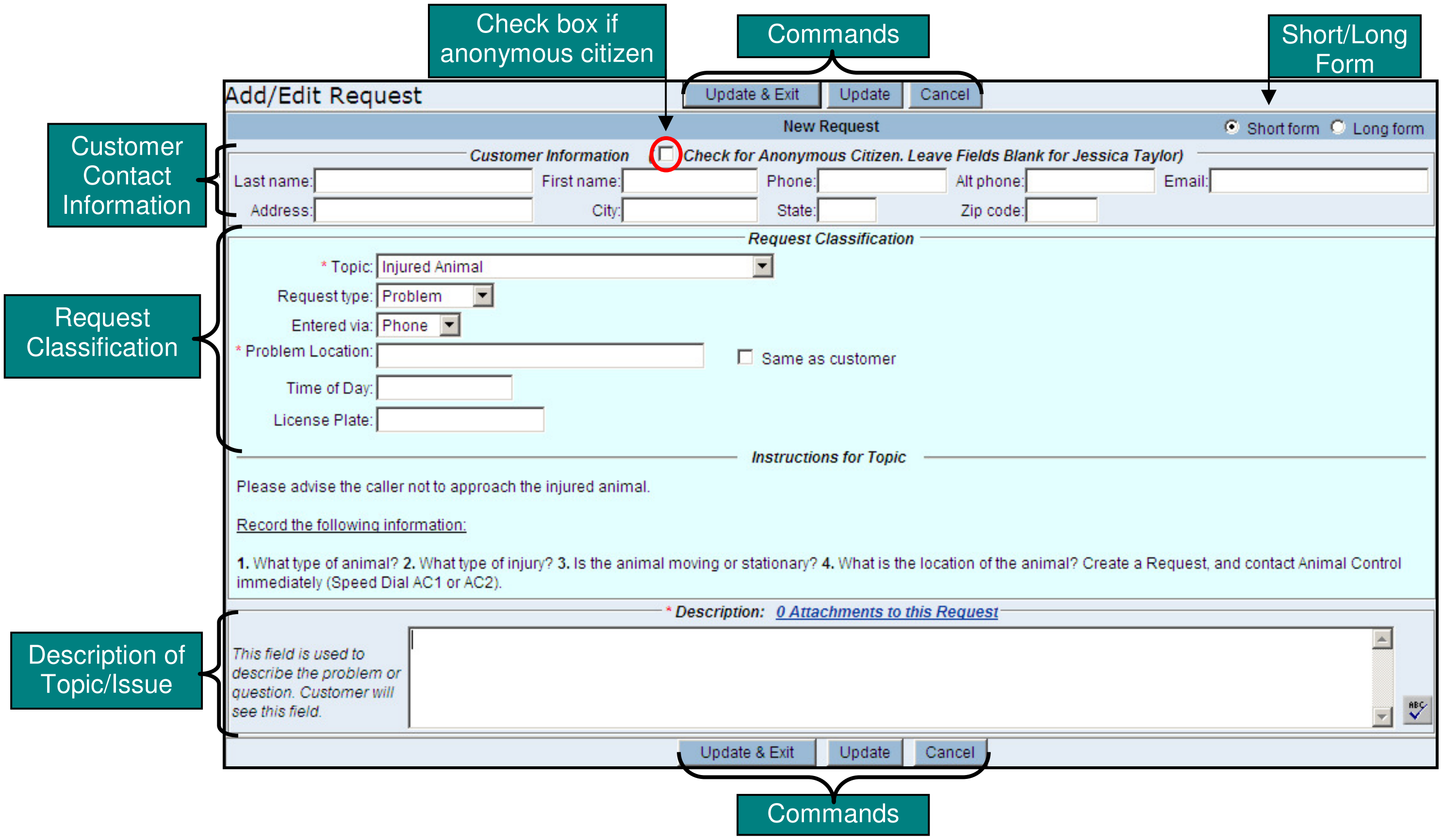


Figure 10 – Employee New Request Screen

Customer Contact Information

The top part of the screen is the customer contact information area. Fill in as much information as the customer will provide. Some fields may be required such as the Last Name, or Phone Number depending on the topic selected in the Request Classification section (Described in the next section). Required fields are indicated by a red asterisks, next to the field. The system will prompt you with a message after updating the request if a required field on the form is not filled out.

If the citizen would like to be kept informed about the request, certain fields are beneficial to record (even if they are not required), such as their email address and phone number. Email is especially useful as the system provides several forms of communication with the citizen.

With a citizen email address, the system will….

1. Automatically send an email notification to the customer when the request is closed. The email notification to the citizen will display the information in the Reason Closed box with a satisfaction survey link to report on the service.
2. Log all email communication with the citizen onto the Request Screen by using the Collaboration Tools. See **Page 24** for more information.

3. Provide the citizen with their account information, so they may sign-in online to submit and track the status of their own requests.

Anonymous Requests

Some topics will allow the citizen to submit an anonymous request if the contact fields are not required. To submit this section blank, you must check the box at the top labeled *"Check for Anonymous Citizen."* (**See Figure 10**). If you leave the Customer Contact Information blank without checking this box, the system will automatically fill in your own contact information and as an employee you are now the requestor.

Name Look-up List

Citizens will often have other requests in the system. If this is the case, a Name Look-up List will automatically appear on the screen once you type in their last name.

To use this feature:

Start typing the first few letters of their last name and press the TAB key or click on the next field on the screen. The system will automatically perform a search for names that begin with those letters. For example, if the citizen's last name is "Jones", type in the entire last name or just the letters "jon." A pop-up window will appear with a list of possible citizens. Select the correct citizen's first or last name and the information will be copied over to the request screen (See **Figure 11**).

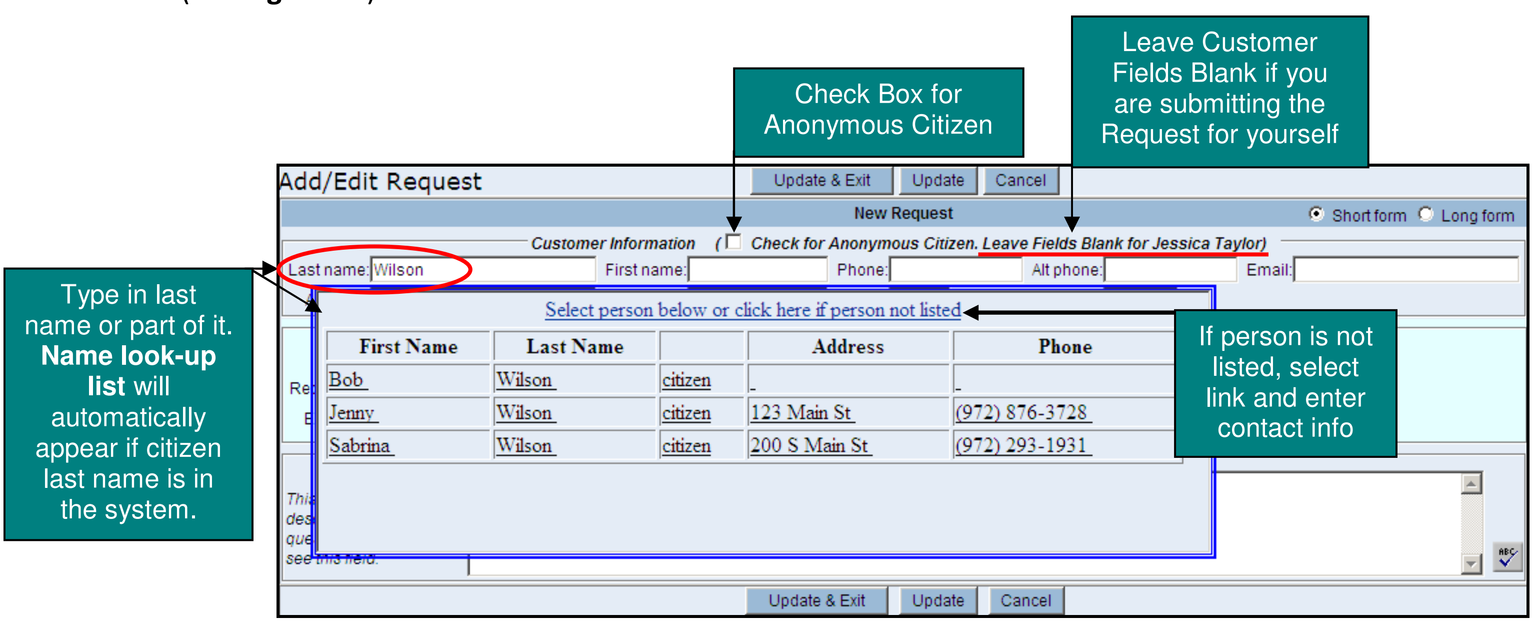


Figure 11 – Name Look-up List

Combining Accounts for same Citizen

It is important to use the Name Look-up list to keep requests for the same citizen on the same account. Choosing to ignore the Name Look-up list when the customer already has an account, will create two accounts and their new requests will not be linked to their previous requests. *Exception:* If the same email address matches their previous account, their requests will automatically link together.

Tracking Requests for a Customer

While you may use the Quick Find or Advanced Find search tools to find requests for a citizen, the New Request screen will also track the total number of requests for a citizen. If the citizen has more than one request filed, a link will appear next to their contact information (See **Figure 12**).

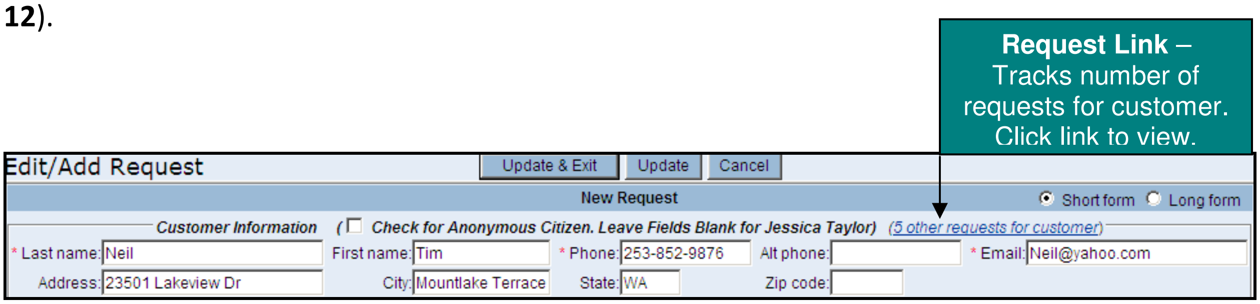
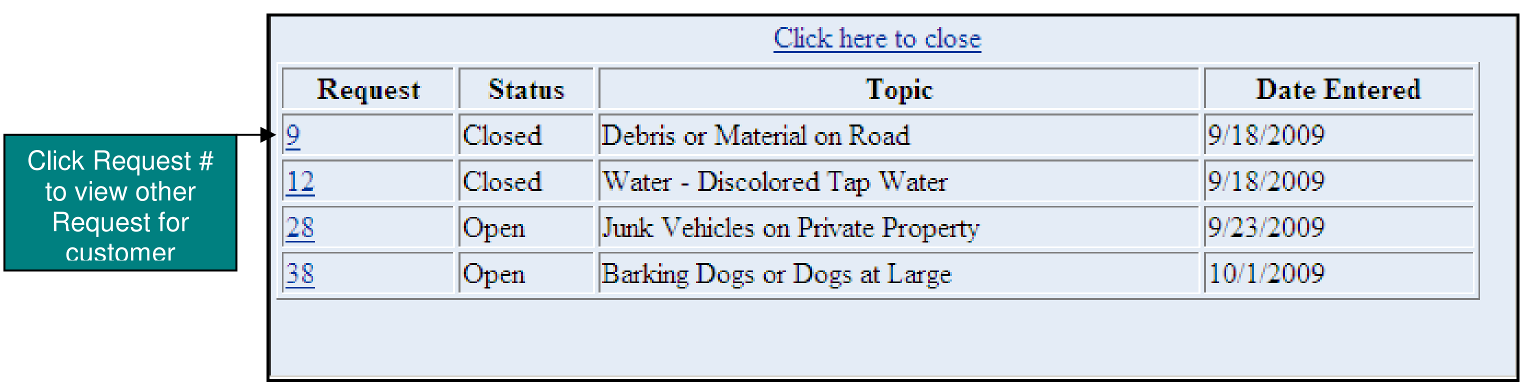


Figure 12 – Request Screen Displays link to Customer's requests

Clicking on the request link for the customer will display a dialog box (**See Figure 13**). Click on the Request # to view the details of the request.

(***Note** – You may only view the customer's other requests if you have permissions to view them. Otherwise, the system will display the message "*You do not have permissions to access the request*". The message will let you know the employee's name that can access the request, so you may forward the caller to the appropriate employee. See **Figure 14** to view the message. If you do have permissions to view the request, the system will take you to the request screen for that request).



Request	Status	Topic	Date Entered
9	Closed	Debris or Material on Road	9/18/2009
12	Closed	Water - Discolored Tap Water	9/18/2009
28	Open	Junk Vehicles on Private Property	9/23/2009
38	Open	Barking Dogs or Dogs at Large	10/1/2009

Figure 13 – Customer Display list of Requests

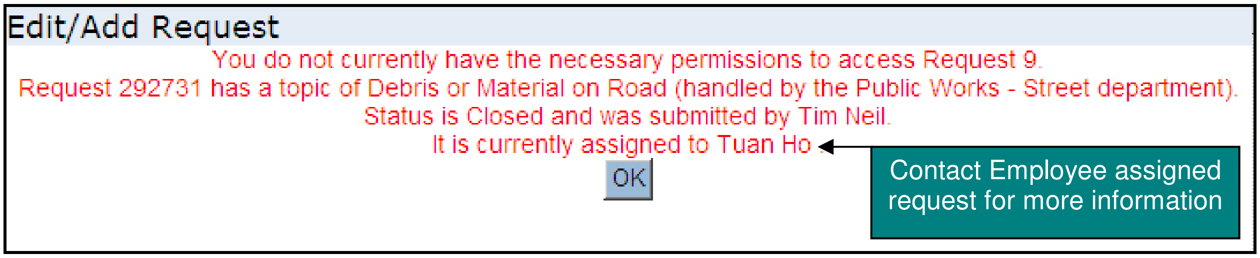


Figure 14 – Display message if you do <u>not</u> have access to view request

Request Classification

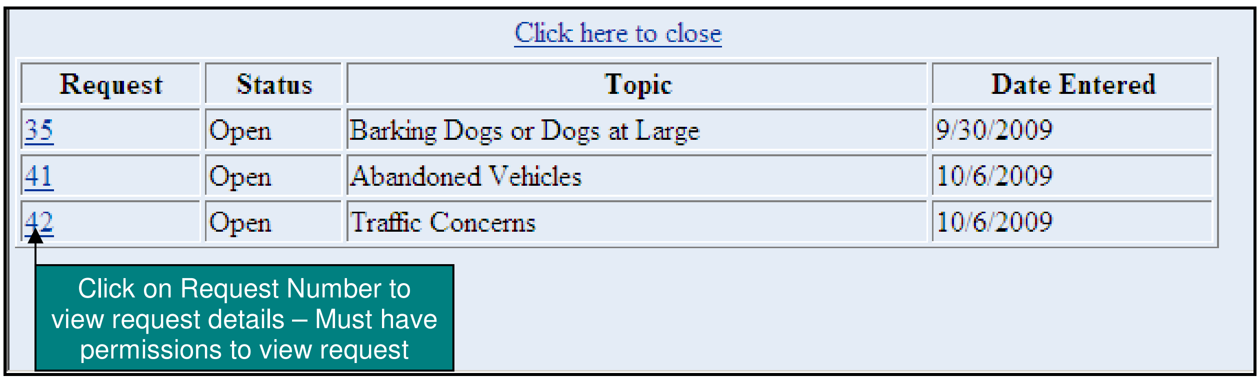
The Request Classification area is the section in the middle of the New Request Screen. It contains the details about the request, including the Topic name, Request Type, and how the request was entered. Depending on your agency's preferences for specific topics, various fields will automatically appear for additional information. In **Figure 15**, the topic "Water Main Break" displays the "Problem Location" and the "Time of Day" fields. Required fields display a Red Asterisks next to them. Other topics may display different fields to prompt the employee or citizen for the necessary information. These fields may include: License #, Park Name, Facility Name etc…

Figure 15 – Request Classification Screen

<u>**Each field is described below:**</u>

- **Select a Topic** – Select the topic of the concern that best fits the citizen's complaint or problem. Selecting the correct topic is important as it allows the request to be assigned to the correct employee.
- **Request Type** – Select Problem, Question, Compliment or Complaint to indicate the type of request.
- **Entered Via** – Select how this request was entered. The default is Phone. Additional choices are Web, Email, iPhone, Android, or Other.

- **Problem Location:** The problem location will display a Google map if an exact address (200 S Main St. Cedar Hill, Tx) or cross streets (ex. Houston & Cedar St) are typed in this field.
- **Tracking Requests at a Location:** The system will track all requests that have already been submitted at a location. In **Figure 15,** a blue link next to the Problem Location field will appear. By clicking on this link, a dialog box will display all the requests submitted at the location (See **Figure 16**). Clicking on one of the blue request numbers on the left, will display the request screen for that topic. **Note:** You may not have permissions to view other requests submitted at the Problem Location and a message in Red will display telling you which employee has access to it. See **Figure 14** to view message**.**
    1. **Note:** If you think you need access to a request that you do not have permissions to view, please contact your IT department or Government Outreach Support at Support@govoutreach.com.


Click here to close

Request	Status	Topic	Date Entered
35	Open	Barking Dogs or Dogs at Large	9/30/2009
41	Open	Abandoned Vehicles	10/6/2009
42	Open	Traffic Concerns	10/6/2009

Figure 16– Requests Listed at the Problem Location

Short and Long Form – Request Screen

In **Figure 17** at the top right corner of the New Request Screen, the request may be viewed as a **short** or **long form**. The Request screen defaults to the Short Form. Selecting the Long form will display additional fields, which include: Assigned to, Status, and Priority.

Long form additional fields:

- **Assigned to** – The topic selected will automatically assign the request to an employee after the request is updated. However, you may type in an employee's name to override automatic routing. The system will perform a name look up if you type in part of the employees first or last name and TAB out of the field or click on the next field. For example, if the employee's name is Jennifer Canter, typing in "Can" will find all employee names in the system containing these three letters such as Canfield, Duncan or Canter.
- **Status** – The status of a request may be Open or Closed. This field defaults to "Open" when a request is initially submitted.
    - Some employees may have a status option of "Work Done" instead of "Closed." A work done status means the request will be reassigned to their manager to review their response before the request is sent back to the citizen. For more

information about "Work Done" see **page 31, "Validate Mode"**.

- **Priority** – Select Normal, High or Low. High priority requests will display a Red exclamation point (!) next to the Request Number on the Request Log. Low priority requests will display a downward arrow next to the request number (↓).
- **Reason Closed** – A message is required to be typed in the Reason Closed box when the request has been resolved. For more information about the Reason Closed Box, see **Page 25** & **26**.

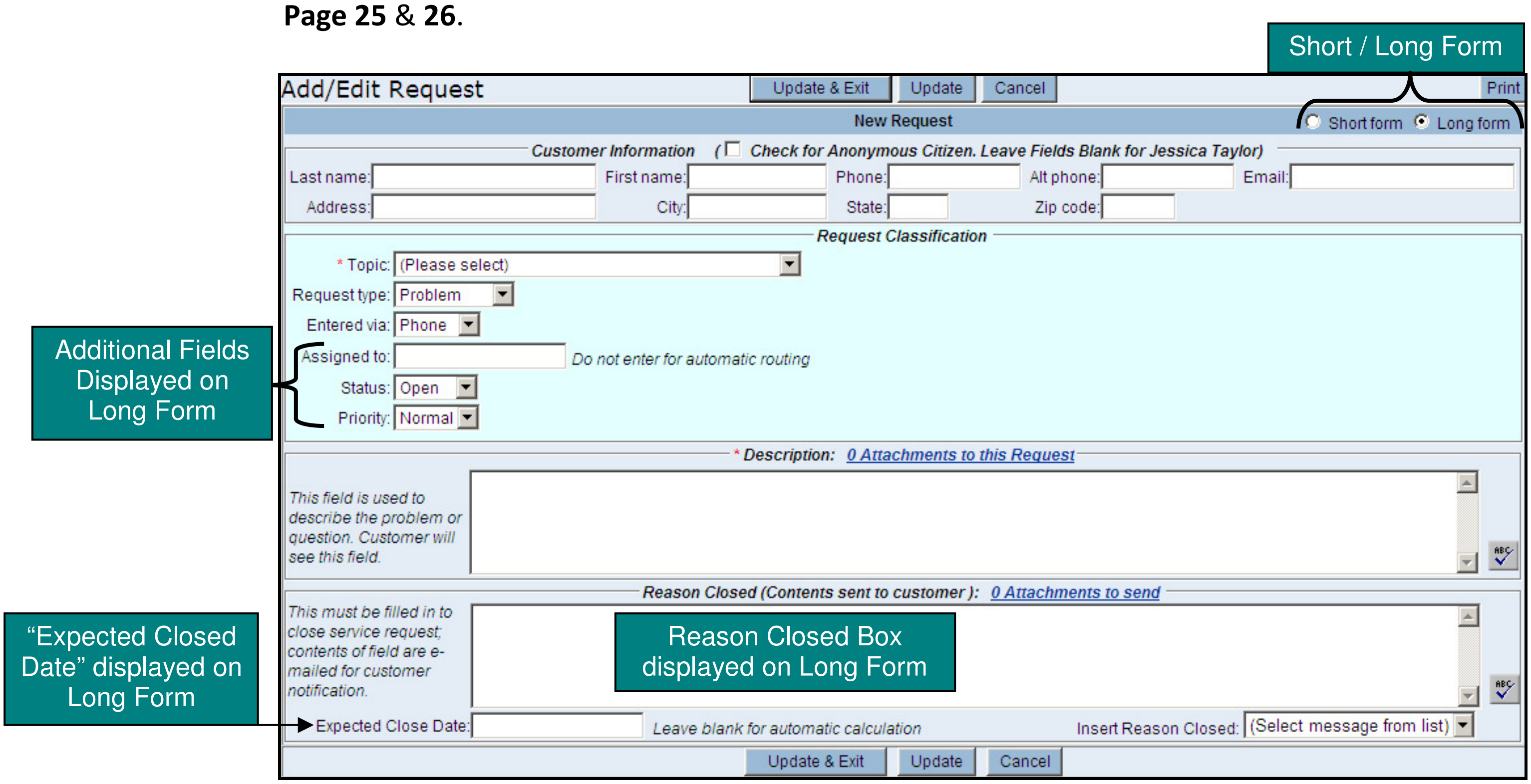


Figure 17 – New Request Screen: Long Form

Request Description

This is the last section of the New Request Screen. This field is used to describe the problem or question. A description about the Topic is required before you Update & Exit the screen. If the citizen has provided an email address, the citizen can view what you write here, when they log-in to their own account online or receive an email notification from the system.

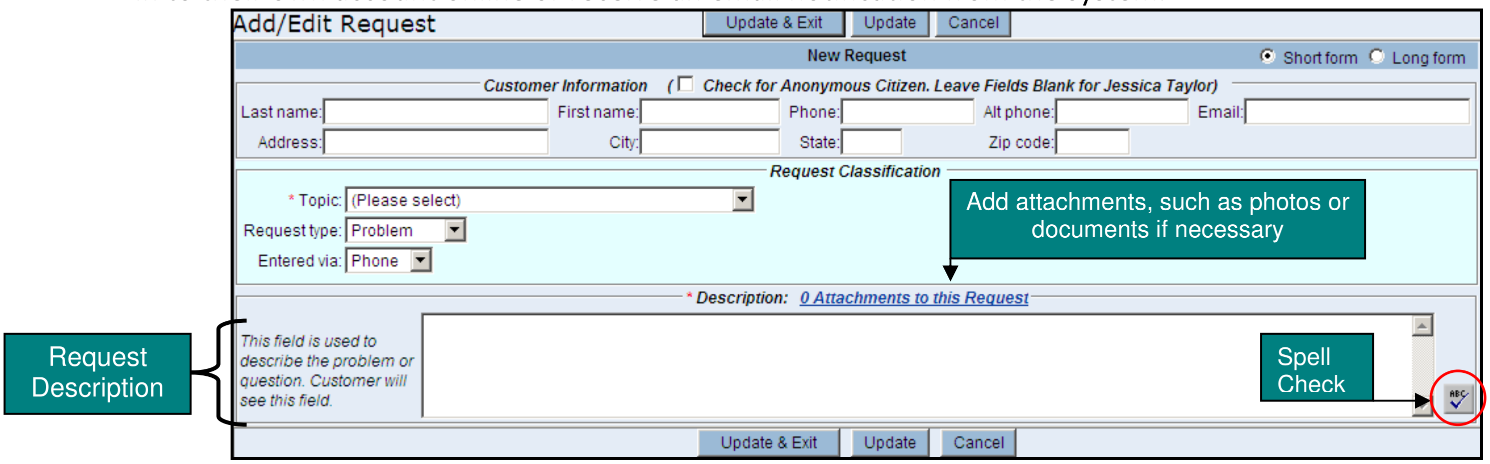


Figure 18 – New Request Screen: Request Description

- **Description** – Enter a detailed description for the request.
- **Spell Check Button** – The ABC button will check the spelling of any text in the Description field. It is important to use proper spelling as the citizen can view what is typed into the description field if they provide an email address.
- **Attachments to this Request** – You may attach jpeg photos, Word documents, scanned letters, PDF files etc… to a request by clicking on this link. The citizen can view the attachment if their email address is provided. The attachment may be hidden from the citizen by checking the box “Hide from Citizen.” The employee assigned the request will also receive the attachment(s) when they open the request (**Figure 19**).

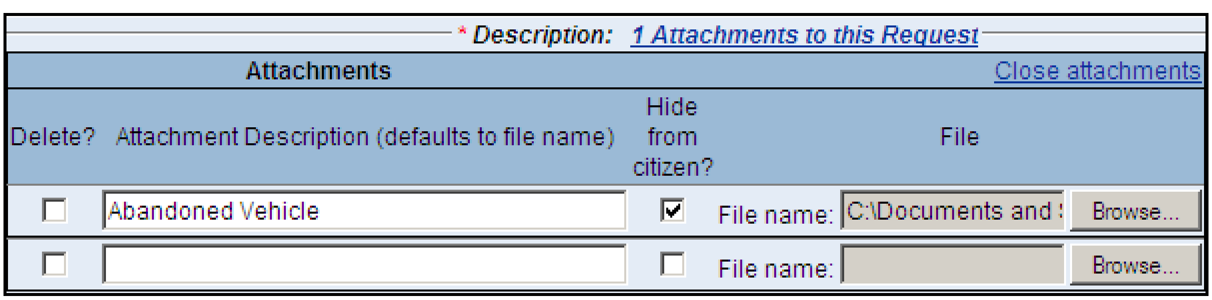


Figure 19 – Attachments

Update & Exit Command Buttons – What They Do

The command buttons at the top of the Request Screen include **Update & Exit, Update, or Cancel.** Both Update buttons will:

1. Save all the information on the request to a database
2. Send an email notification to the Employee assigned the request
3. Send an email confirmation to the citizen (if citizen provided email address). If it is the Citizen's first time submitting a request, the email will contain their account information to sign-in online.
4. The cancel button will exit the screen and <u>not</u> save the request.

<u>Update & Exit Command</u>

The Update & Exit commands will save the request and return to the Request Log screen. If the request description was just entered, a dialog box will display the request number and the number of days to resolve the request **(See Figure 20).** You should communicate this information to the customer as the request number is one way the citizen can call back to check on the status of the request.

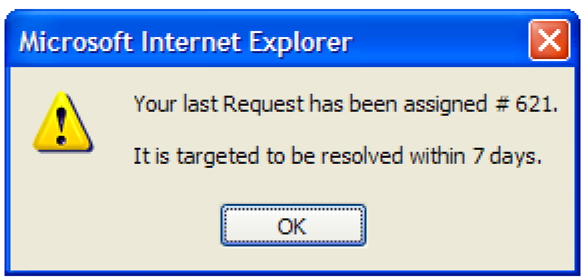


Figure 20 – Request Message

<u>Update Command</u>

The Update button will save the request and keep you on the same request screen. The request screen will change slightly, after Updating, by displaying extra fields and buttons (**See Figure 21**). Notice the request number and the expected close date are displayed on this screen as well. This information can be given to the customer, so they may track their request.

The other fields displayed include the employee's name assigned the request, and a gray button called "Create another Request for Customer." Selecting the "Create another Request for Customer" this will open a new request screen for the same customer. The customer contact info will be copied from the existing request to the new request for your convenience. Simply select a new topic and fill out the description of the issue. This is useful when a citizen calls in for two or three different problems at once. Each request must be submitted under a separate topic, so the correct issue is routed to the correct employee.

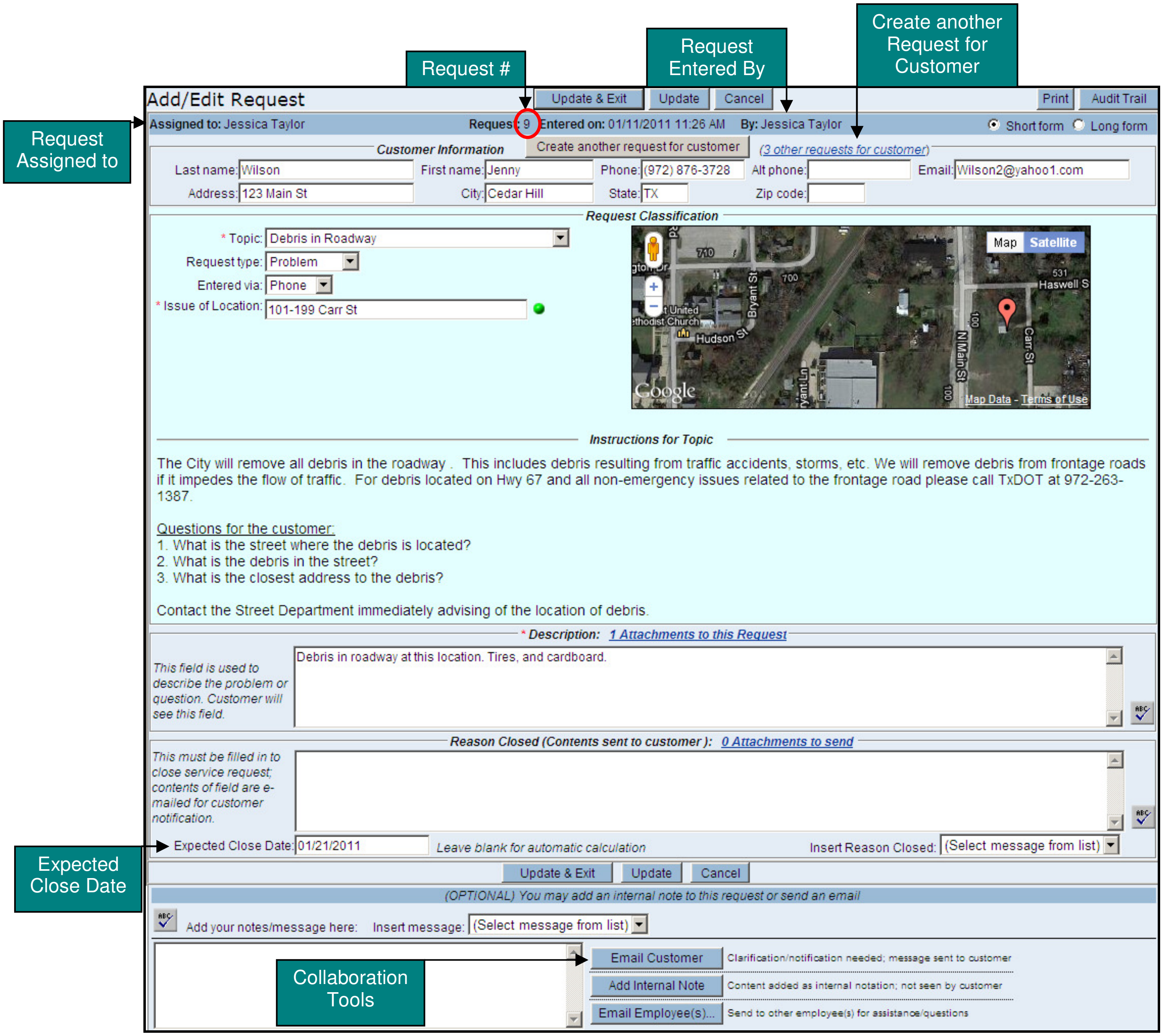


Figure 21 – Request Screen after Updating

A Request Assigned to You

If a request has been assigned to you, there are two ways to view the request:

1) Email notifications are sent for every request that is assigned to you. The email includes a request summary, the request number, the due date and a link to access the request. Clicking on the request link in the email will open the request screen and by-pass the Request Log. If you are not currently logged in, the system will prompt you to Sign-in before you can proceed (**Figure 22**).

2) The second way to access a request assigned to you is at the request log. Click on the Request to view the details. (**Figure 23**).

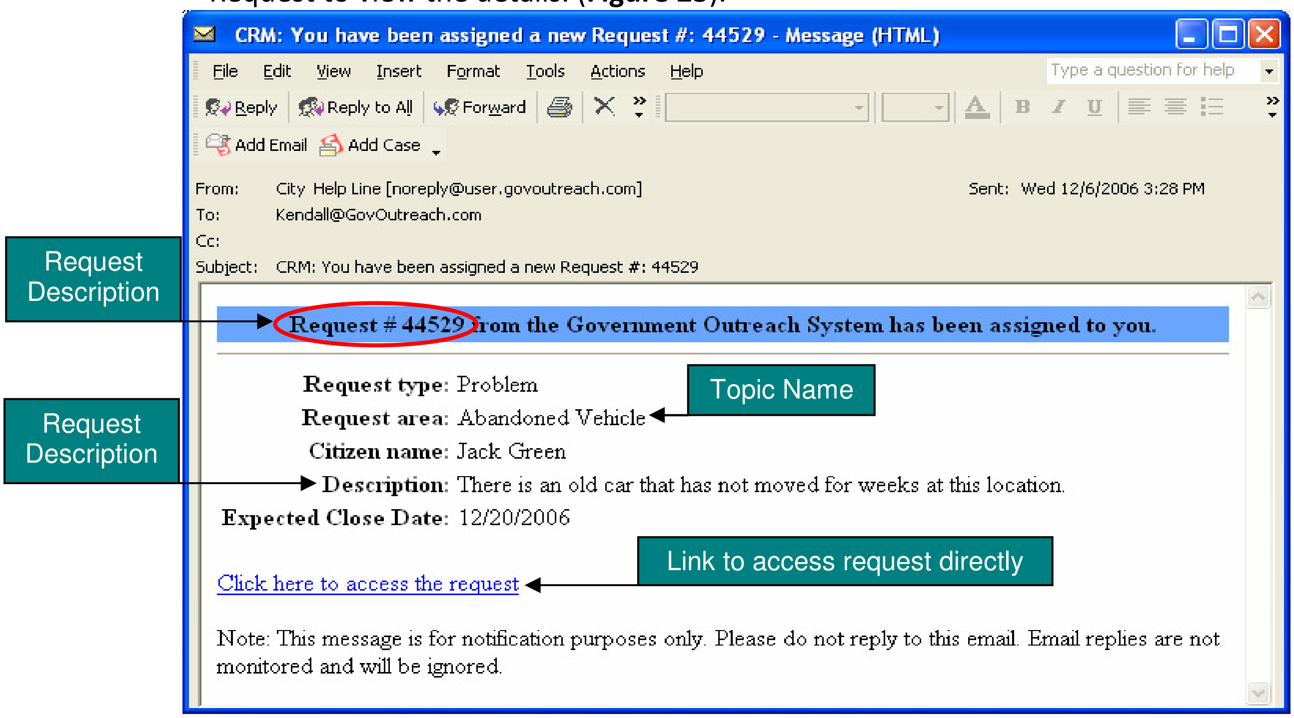


Figure 22 – Employee Email Notification

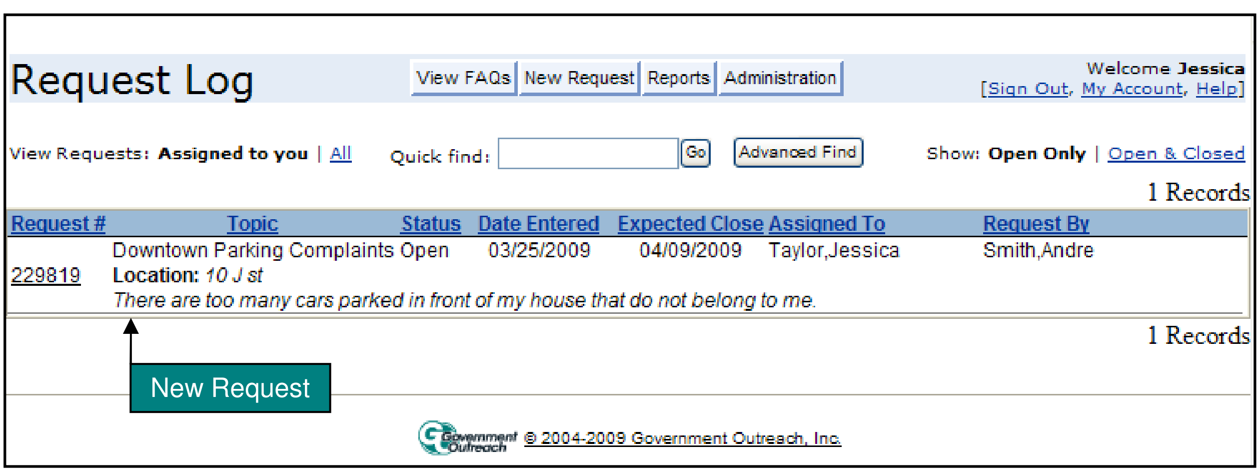


Figure 23 – New Request in Request Log

Opening a Request Assigned to You

Figure 24 shows the different sections of a submitted request "assigned to you". Notice this screen has additional sections compared to the initial intake of the issue on the New Request Screen.

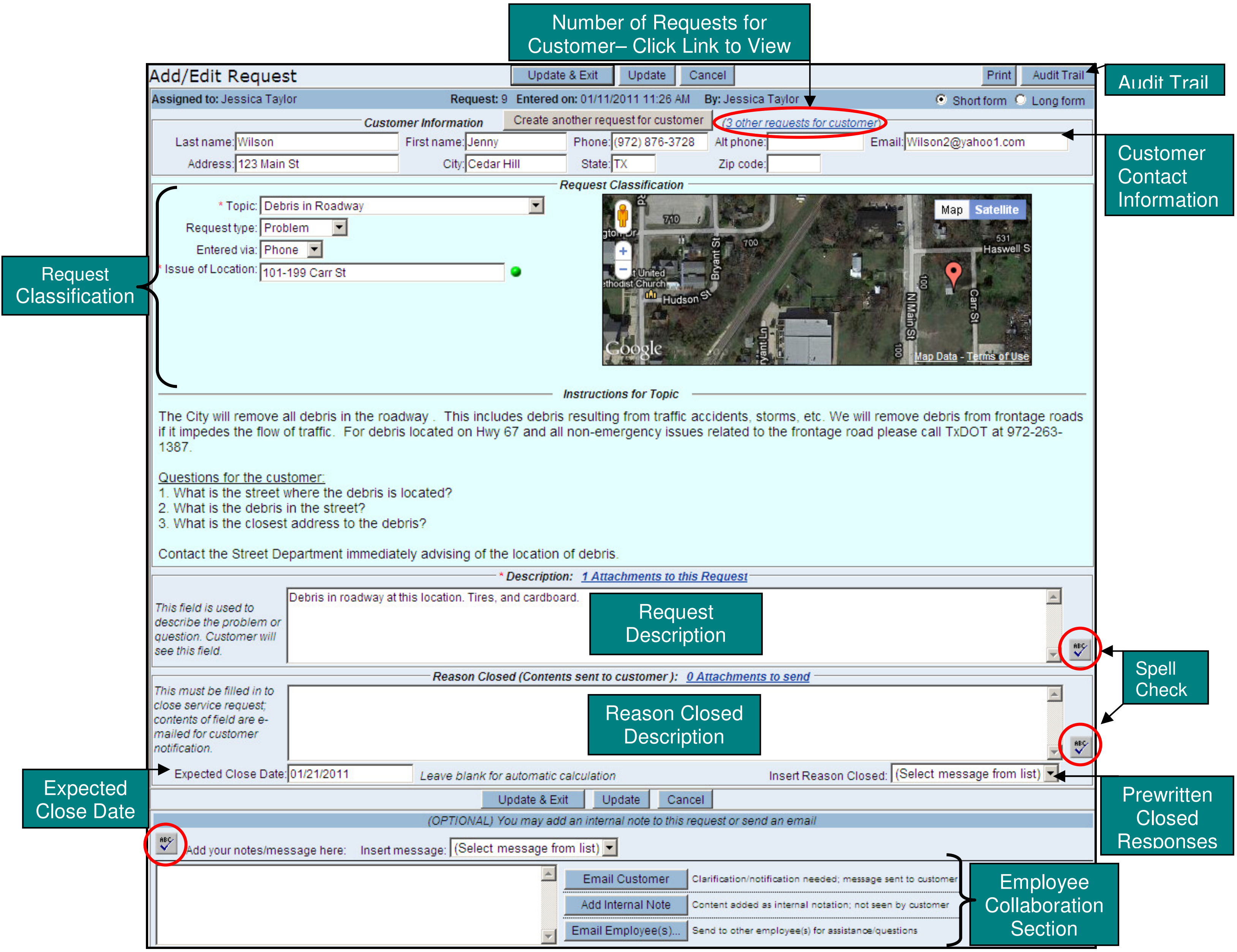


Figure 24 – A submitted request "Assigned To You"

Field Descriptions for Figure 24 – A Request "Assigned to You"

Collaboration Tools

The Collaboration Tools allows you to communicate or collect more information from the customer and/or other employees by email before closing the request. You may also add notes to the request in this section.

To use these tools, type your question or message in the box provided to the left and then select one of the buttons to the right: **Email Customer**, **Add Internal Note, or Email Employee's** (See **Figure 25).** If you selected the Email Customer, your question will automatically send an email to the citizen. If the customer responds to the email, their response will be displayed on the Request Screen. If the customer did not provide an email address, the "Email Customer" button will be disabled.

Adding Internal Notes are a useful way to record general notes regarding correspondence with the customer or reminder notes to track the progress of the request. To add notes to a request, type your message into the box, and select the "**Add Internal Note**" button. Your comments or questions will display on the Request Screen. The citizen, however, will not see the Internal Notes in any email notification or on their online account.

You may also email other employees by using the "**Email Employee(s)…**" button. This allows you to correspond and obtain information from employees in other departments. The customer will not see this correspondence with other employees through email or on their online account.

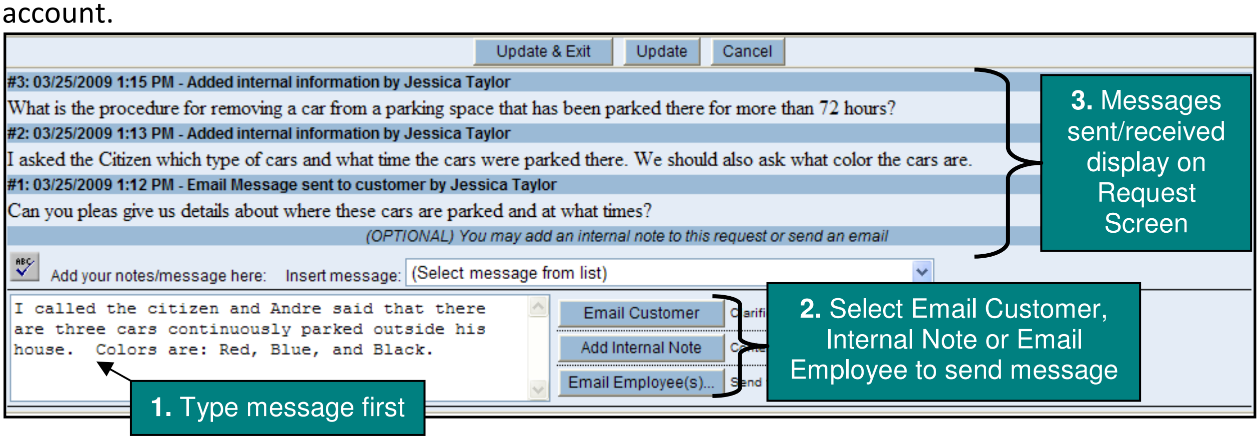


Figure 25 – Employee Collaboration

Important: Any time you enter or change information about a Request, it is not saved until you press one of the **Update** buttons at the top of the screen.

Reason Closed box

The Reason Closed box is a required field to close the request (**Figure 26**). When you update the Request with text in the Reason Closed box, the system will automatically prompt you with a dialog box to change the status of the request to "Closed" (**Figure 27**). Be sure to click **OK** to this message if you want to close this request to send an email notification (if provided) to the citizen. If you select "Cancel" on the dialog box, the request resolution <u>will be saved</u>, ***but*** the request status will remain "Open" and the citizen will <u>not</u> receive an email notification until you manually change the request status to "Closed" and select "Update."

Fields the Customer can see in an Email Notification

Customers who provide an email address will see the Description, Reason Closed, and Email Customer of the Collaboration Tools. A spell check button, labeled **ABC,** is available next to each of these fields.

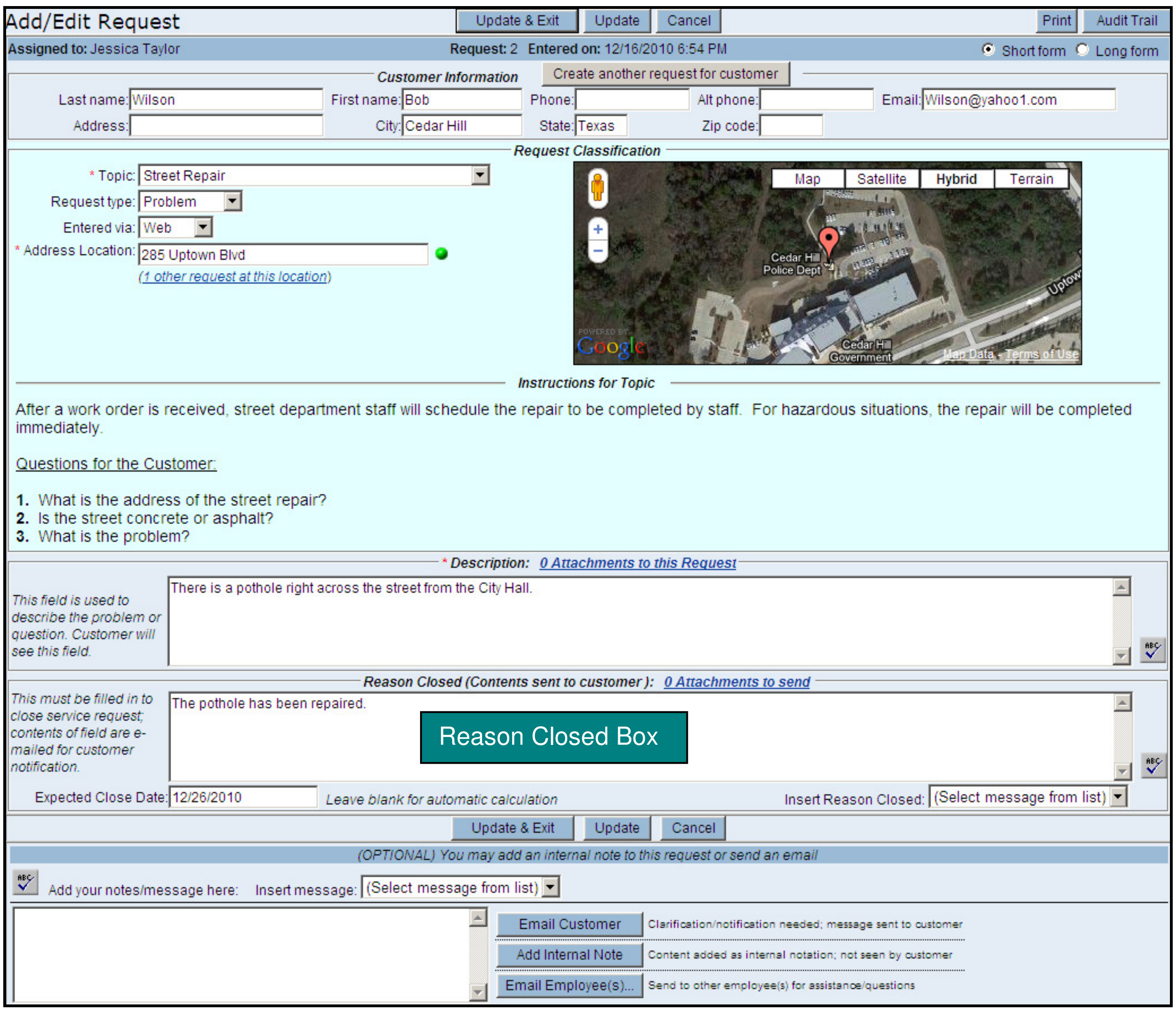


Figure 26 – Request Assigned to You: Reason Closed Box

Figure 27 – Dialog Box: Closing Status of Request

Pre-written Responses – Insert Reason Closed field

If you receive the same questions or issues from citizens frequently, it is useful to create and save a standard or pre-written response. These pre-written responses are stored in a list called "**Insert Reason Closed**" on a Submitted Request (**See Figure 28**). When a pre-written response is selected from the list, the response will be inserted into the "**Reason Closed"** box.

To create a custom "pre-written response" find the "Insert Reason Closed" field toward the bottom right on the Submitted Request screen." Select the drop down menu, and choose "Add/Delete Message." A dialog box will appear **(See Figure 29)** (*Note – Be sure to enable pop-up windows for your browser). Give your response a Name and write a message to respond to a frequent question or issue from the citizens. When you are finished, select "Add Message." You will now be able to select this message from the list to insert into the "Reason Closed" box.

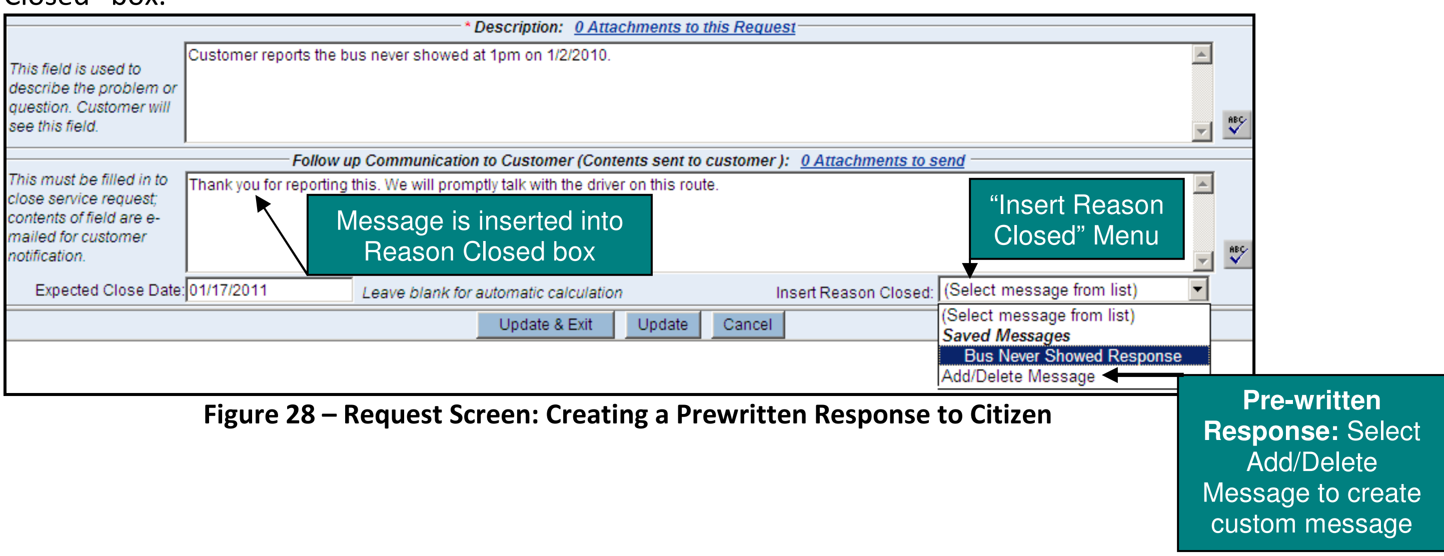


Figure 28 – Request Screen: Creating a Prewritten Response to Citizen

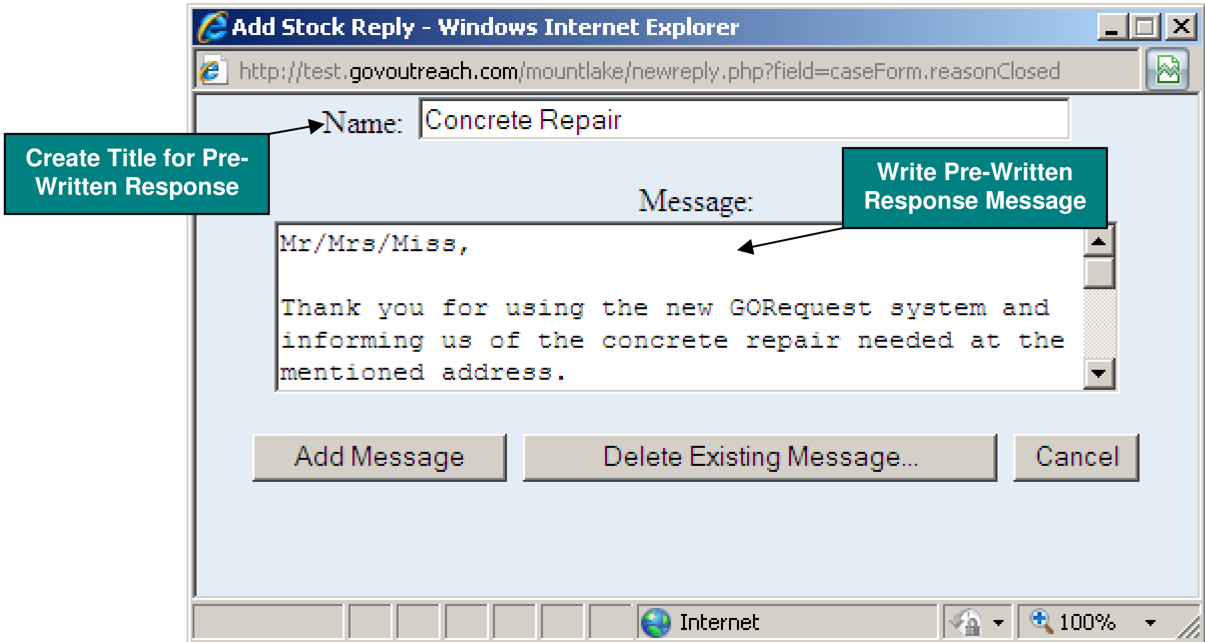


Figure 29 –Prewritten Response Dialog Box

Deleting a Pre-Written Response

To delete a pre-written response from the list, select the "Add/Delete Message" from the "Insert Reason Closed" field (**See Figure 28**). A Dialog Box will appear (**Figure 29**). Select the "Delete Existing Message" button. Another dialog box will appear to delete a message (**Figure 30**). Select the pre-written response you want to delete from the menu. Then select the Delete button. (*Note – Only messages saved by <u>you</u> can be deleted. There may be "system" pre-written responses that your entire department can view or the entire agency can view. These are set by an administrator).

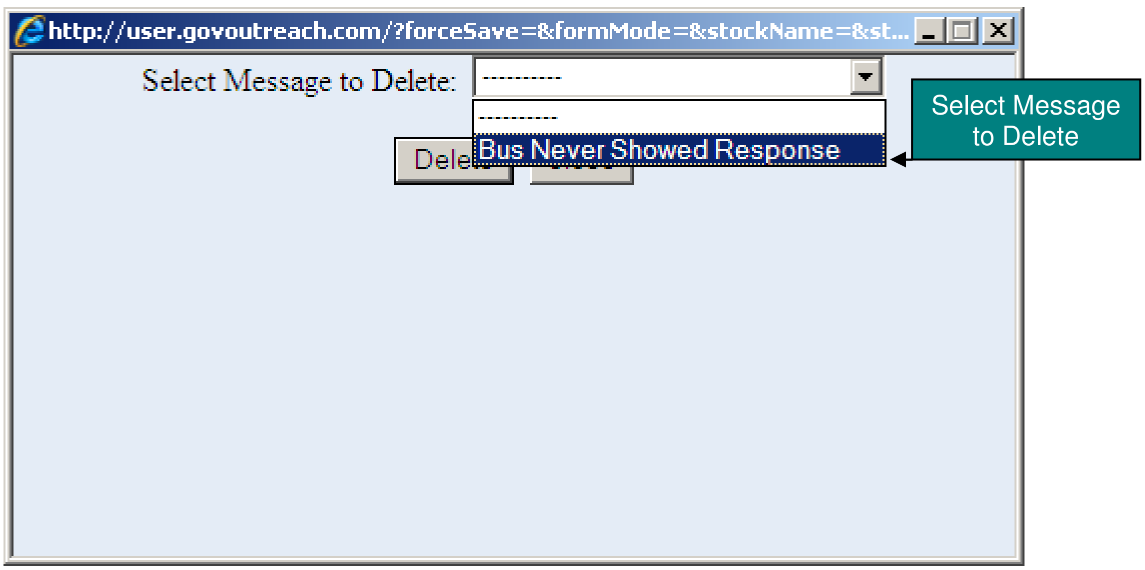


Figure 30 – Deleting a Pre-Written Response

Audit Trail

The Audit Trail tracks all the changes made to a request after the Request Screen is Updated. A description of the changes are recorded with the time, date, and the employee's name who made the change. To view the audit trail, click on the top right corner on the request screen (**Figure 31**). The Audit Trail is shown in **Figure 32.**

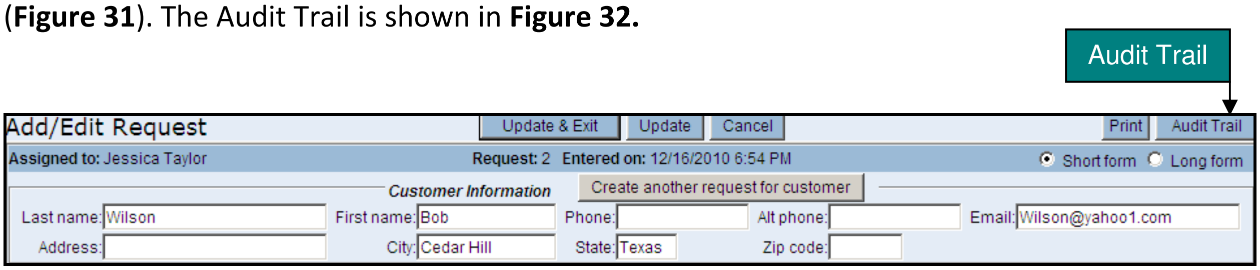
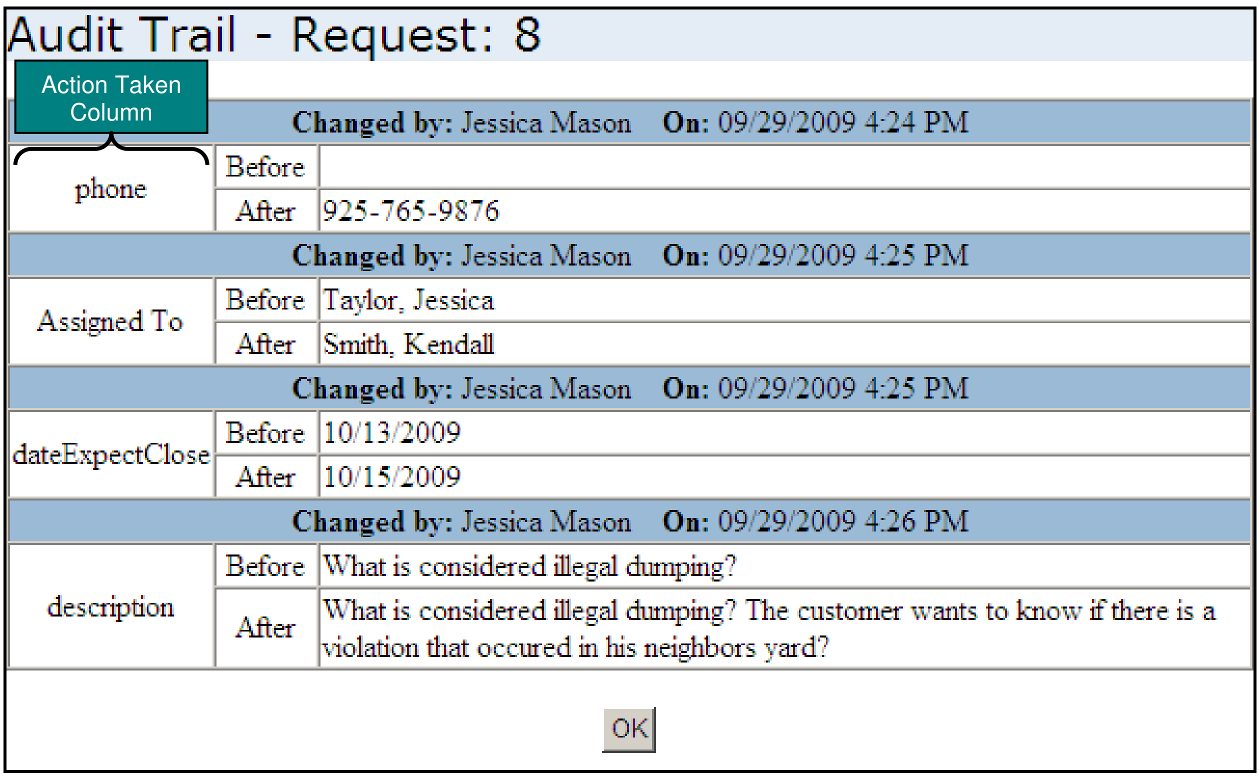


Figure 31 – Request Screen: Audit Trail Command



Changed by: Jessica Mason **On:** 09/29/2009 4:24 PM		
phone	Before	
	After	925-765-9876
Changed by: Jessica Mason **On:** 09/29/2009 4:25 PM		
Assigned To	Before	Taylor, Jessica
	After	Smith, Kendall
Changed by: Jessica Mason **On:** 09/29/2009 4:25 PM		
dateExpectClose	Before	10/13/2009
	After	10/15/2009
Changed by: Jessica Mason **On:** 09/29/2009 4:26 PM		
description	Before	What is considered illegal dumping?
	After	What is considered illegal dumping? The customer wants to know if there is a violation that occured in his neighbors yard?

Figure 32 – Audit Trail

Re-Assigning Requests to another Employee

Occasionally, a citizen or another employee may submit a request under the wrong topic. If this happens, simply select the most appropriate topic under the topic menu of the request screen. Then select one of the Update buttons. This will route the request automatically to the employee who normally handles the topic.

You may also manually reassign the request to the appropriate employee. To re-assign a request, simply type in the employees name into the "Assigned To" field and Update the

Request. This employee will receive an email notification about the request. (**Note** – The "Assigned To" field is located under the Long Form of the Request Screen. For more information, see **Pages 18 and 19**.

Validate Mode

Why can't I close a Request?

If you cannot close a request, it may mean your profile is set to Validate Mode. Validate Mode means your request status will be changed to "Work Done" and the request will be reassigned to a manager or a designated reviewer after you write a message in the "Reason Closed" field and Update. Once you update the request, the system will display a dialog box to change the status of the request to "Work Done" (**See Figure 33**). Click OK and the request will be sent to a designated reviewer to review your response to the citizen. The reviewer will then close out the request for you and an email notification will be sent to the citizen (if customer email is provided).

Your manager (or reviewer) may re-assign the request back to you if s/he wants you to edit your final response. Make any changes necessary to the Reason Closed field and click one of the Update buttons again. Your manager will receive your request again, and close it out.

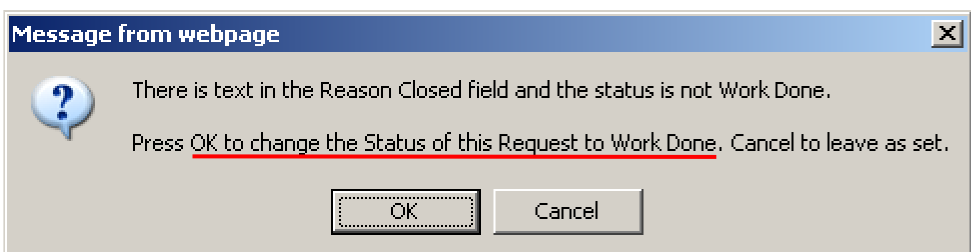


Figure 33 – Changing the Status to Work Done

How do I know if I am in Validate Mode?

You are in Validate Mode if your request status options display **Work Done** instead of "Closed". You can view the status of a request from your request log or you may view the status field on the request screen.

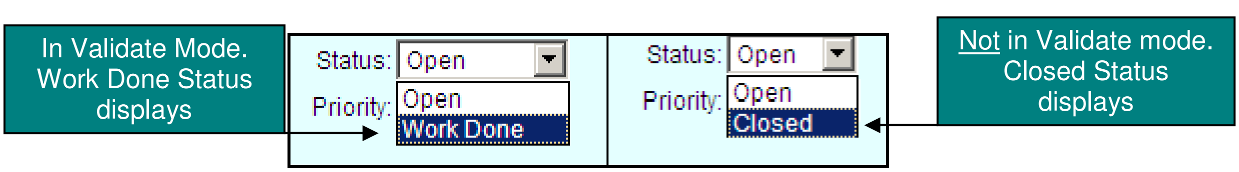


Figure 34 – Request Status Menu: Work Done vs. Closed

How do I know if I am a Validator/Designated Reviewer for an Employee?

You will receive an email notification letting you know that the work for a Request has been completed by an employee and you need to verify and close it. The email notification will provide a link directly to the request for your review. Review the request and the Reason Closed response written by the employee. If you are satisfied with the response, then change the Status to "Closed" and Update the request. An email will automatically be sent to the customer (if an email address was provided) with the Reason Closed message.

Reports

The Reports section is a very useful tool to obtain and measure information about the requests in the system. Several types of reports are provided as bar graphs and charts. To view these reports, select the "Report" button at the top at the Request Log Screen shown in **Figure 3**. The Reports screen will list reports that you have access to view into two or more categories: **Reports for External Requests**, **Reports for Internal Requests**, and **Detail Request Reports** etc… See **Figure 35**. When you create your own custom reports, a list of **Your Request Reports** will appear at the top on the main report screen. (See **Figure 38** on **Page 35** to learn how to create a new report). An "Exit Reports" button will also be displayed at the top of the reports screen.

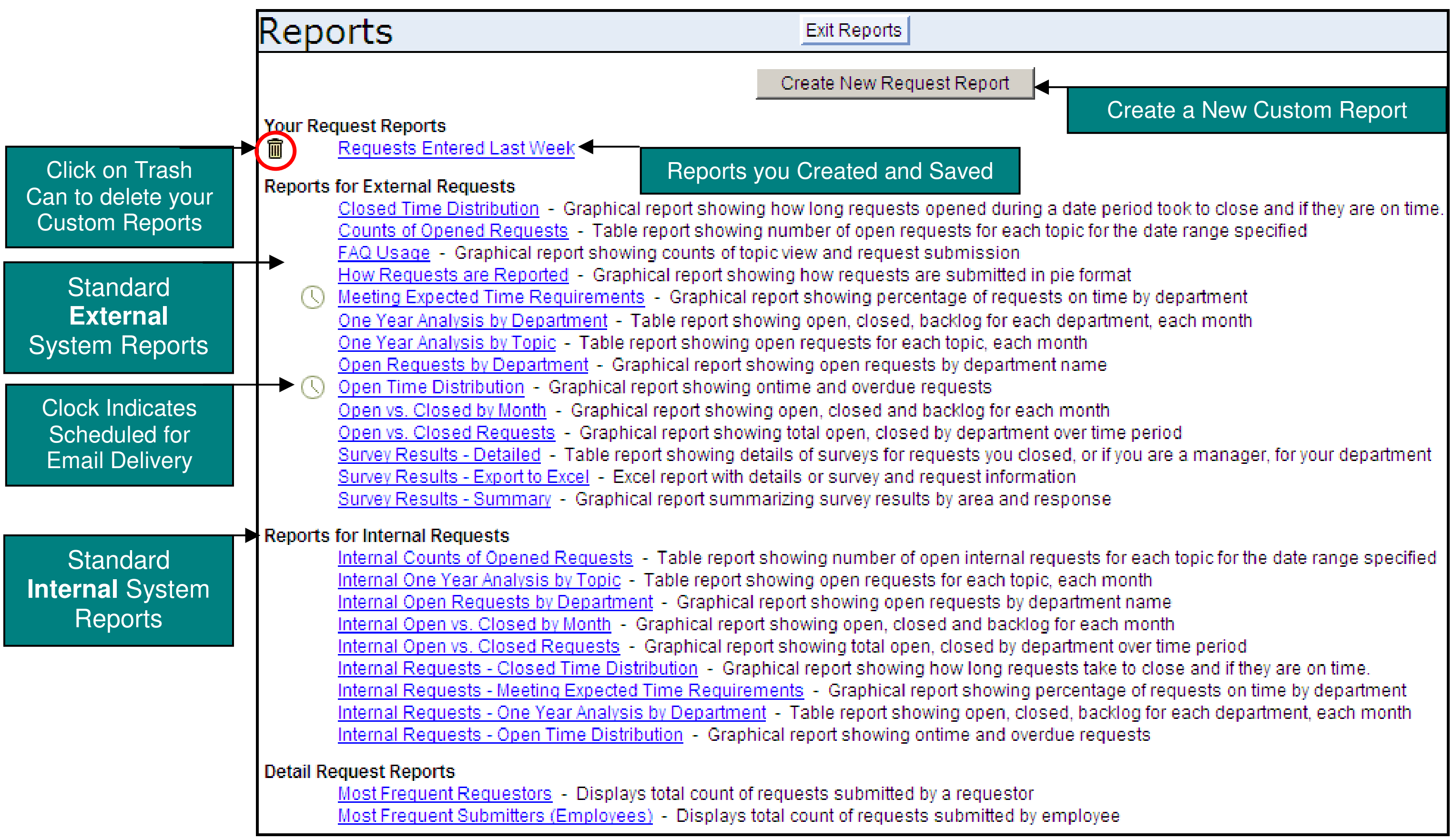


Figure 35 – Reports Screen

Running Standard System Reports

To run a standard report, select a report from the list shown in **Figure 35**. The report will run immediately and display current results if there is data in the system (See **Figure 36).** The results screen will contain Command Buttons at the top for manipulating the report. You may **Select a Different Report**, **Exit Reports**, **Save/Schedule** this report, **Export** the Data to an Excel file, or **Print** the report. Depending on the report selected, there may be different command buttons displayed.

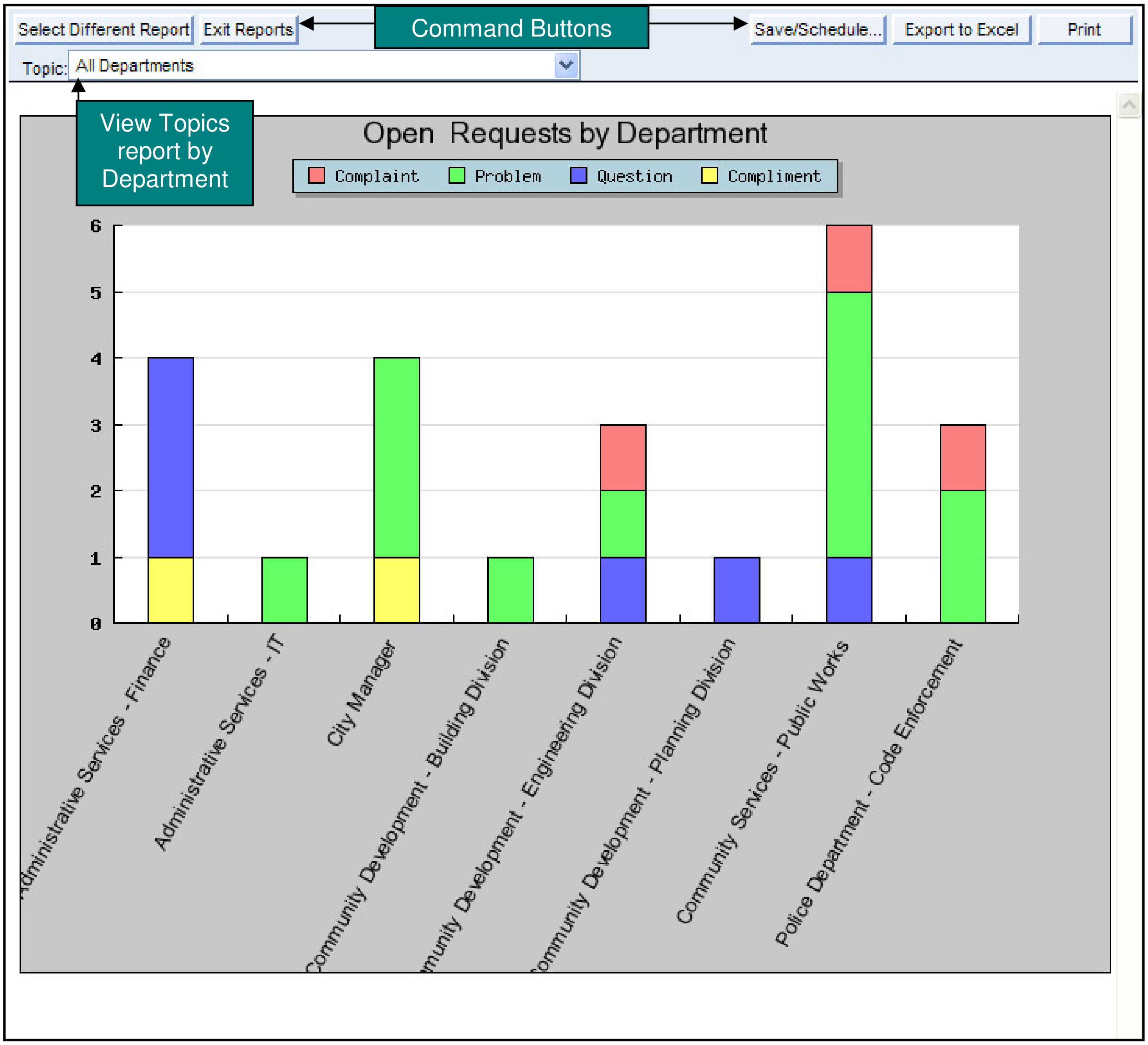


Figure 36 – Example Report – Open Requests by Department

A Detailed Description of the Commands are provided below:

- **Select Different Report** – Selecting this button returns to the main Reports Screen.
- **Exit Reports** – Selecting this button returns to the main Request Log view.
- **Save/Schedule** – Selecting this button allows you to name, rename and to schedule the report for email delivery (See **Figure 36**).
- **Export to Excel** – Selecting this button will perform a file download and prompt you to open the file in Excel.
- **Print** – Print the report results to your printer.

Save and Schedule a Report

The **Save/Schedule Report** button is displayed at the top of any report and it will allow you to Save and/or email a report on a scheduled basis. To **save** a report, click on the Save/Schedule Report button and a dialog box will appear shown in **Figure 37**. Give the report a logical name, and provide a description (not required). Click on save at the bottom of the dialog box and the report will be listed on main reports screen at the top under the heading "Your Request Reports" (See **Figure 35)**.

To **schedule** a report for delivery to your email, continue filling out the Save/Schedule dialog box shown below. Check the box "Email this report to me on a scheduled basis." Below, choose the frequency in which you want the report emailed; on a weekly, monthly or quarterly basis (See **Figure 37**). Selecting "No" for the "Email if No Data" field will tell the system <u>not</u> to email a report if there is no new data for the report. Selecting "Yes" will deliver an email even if there is no new data. Select the Save button at the bottom when you are finished and this report will be marked with a picture of a clock to indicate it is scheduled on the main reports screen (See **Figure 35**).

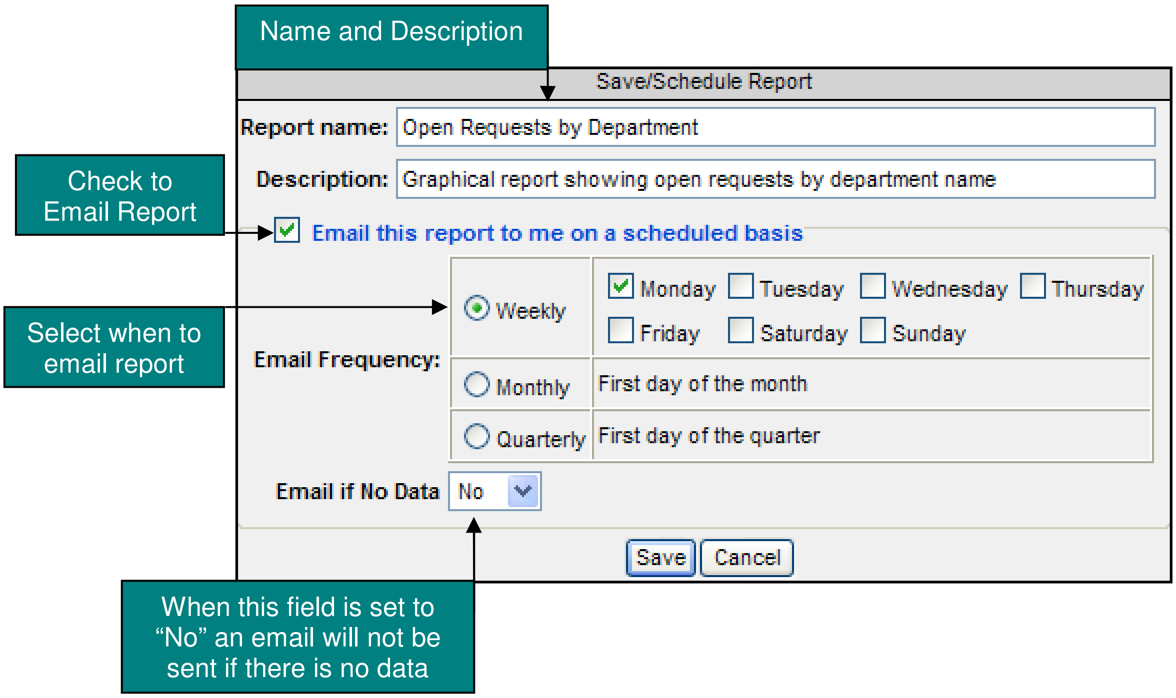


Figure 37 – Save/Schedule Reports

Creating a New Report - Your Request Reports

You can create your own report by querying the system to search for requests you want to view. To create a report, click on the **Create New Request Report** button on the Main Report screen shown on **Page 35**. You will then see **Figure 38** shown below.

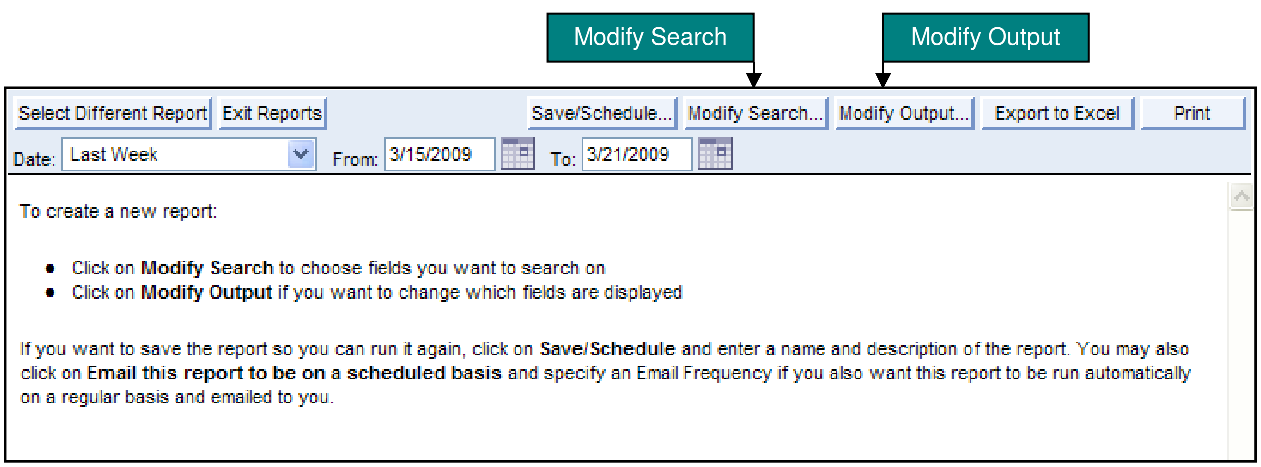


Figure 38 – Create New Request Report

Using the Modify Search and the Modify Output Buttons

There are two additional buttons **Modify Search** and **Modify Output** that appear on the top of the "Create your own report" screen. These commands are described below.

- **Modify Search**… - Allows you to select the search criteria for requests. For example, you may search for requests with the Status "Open," and the customer's phone number. The modify search command functions the same way the "Advanced Find" button does on the Request Log screen. See **Figure 6, 7, 8, and 9** starting on Page 10 for detailed instructions on how to search for requests.
- **Modify Output**… - Changes how the search results are displayed. This is known as the Output. The "Modify Output" changes the sort order of the results as well.

Once you have identified your search criteria using the Modify Search tool and your requests are displayed on the screen, click on the Modify Output button to change the display of the report (See **Figure 39**).

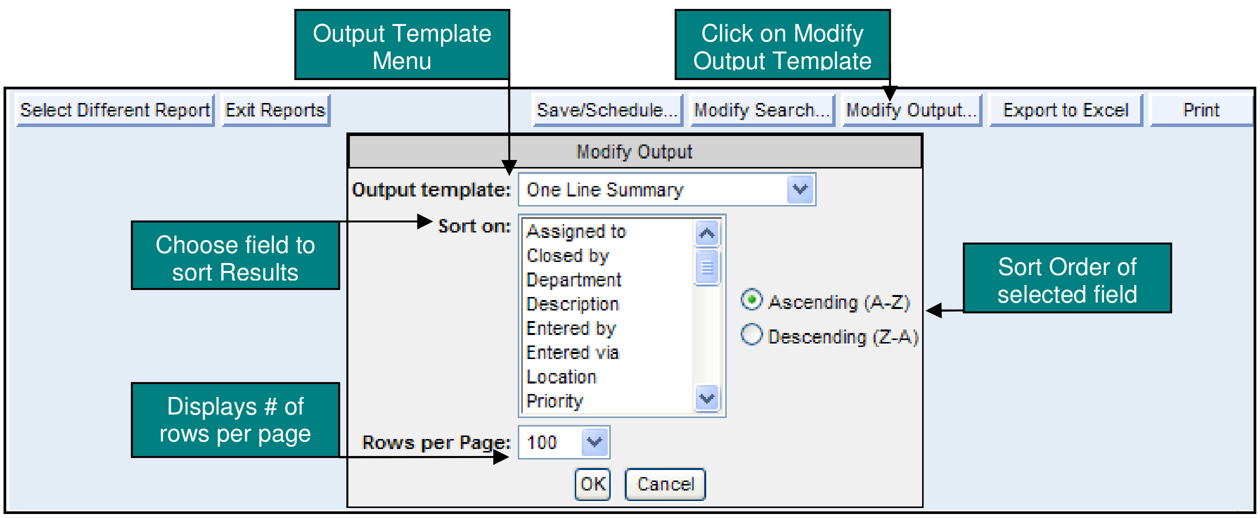
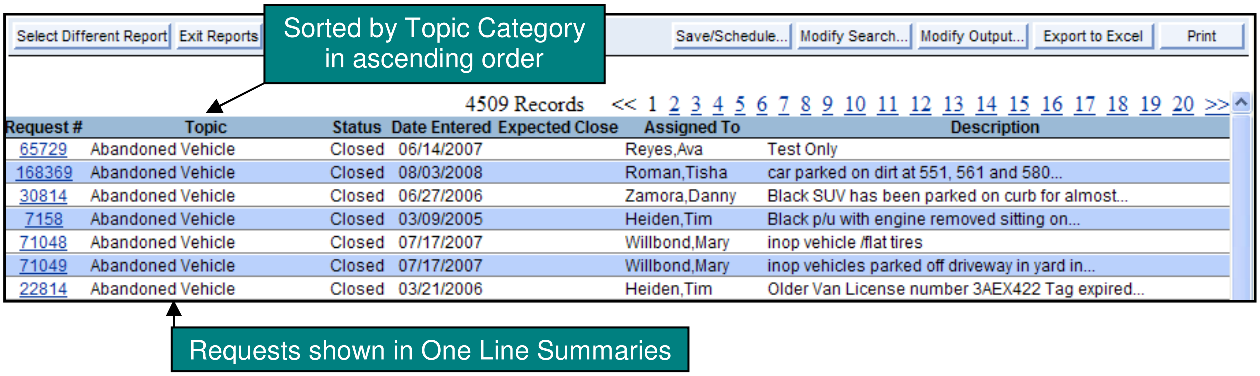


Figure 39 – Modify Output screen

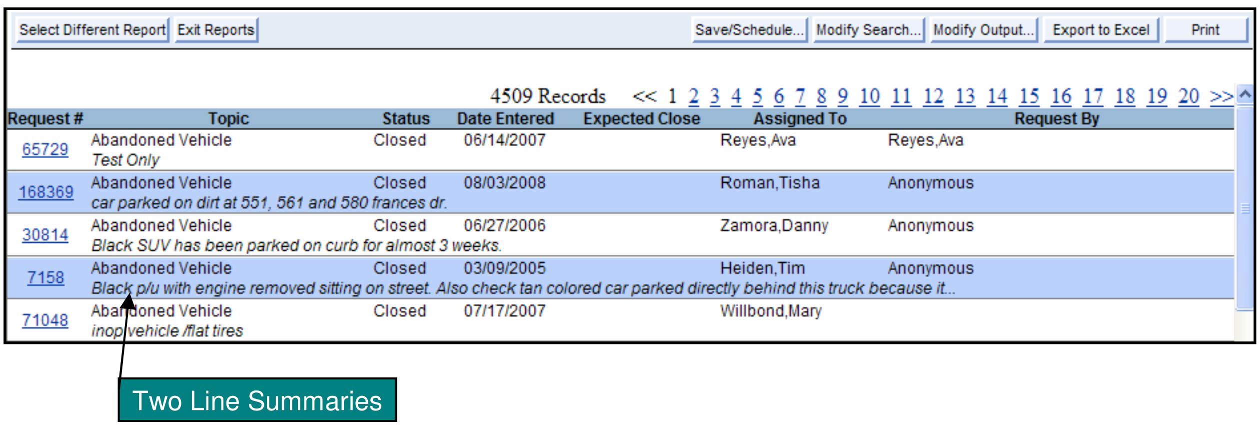
The Modify Output screen shown in **Figure 39** allows you to make several changes to the display of the report. Select the Output Template menu, and select one of the choices.

The **Output template** menu is set to "One Line Summary." This means the system will return the list of requests as one line summaries. See **Figure 40** to view a Report displayed as a One Line Summary sorted in ascending order by the Topic category. **Figure 41** shows results sorted in ascending order by Topic in a Two Line Summary.



Request #	Topic	Status	Date Entered	Expected Close	Assigned To	Description
65729	Abandoned Vehicle	Closed	06/14/2007		Reyes,Ava	Test Only
168369	Abandoned Vehicle	Closed	08/03/2008		Roman,Tisha	car parked on dirt at 551, 561 and 580...
30814	Abandoned Vehicle	Closed	06/27/2006		Zamora,Danny	Black SUV has been parked on curb for almost...
7158	Abandoned Vehicle	Closed	03/09/2005		Heiden,Tim	Black p/u with engine removed sitting on...
71048	Abandoned Vehicle	Closed	07/17/2007		Willbond,Mary	inop vehicle /flat tires
71049	Abandoned Vehicle	Closed	07/17/2007		Willbond,Mary	inop vehicles parked off driveway in yard in...
22814	Abandoned Vehicle	Closed	03/21/2006		Heiden,Tim	Older Van License number 3AEX422 Tag expired...

Figure 40 – One Line Summary Request Output



Request #	Topic	Status	Date Entered	Expected Close	Assigned To	Request By
65729	Abandoned Vehicle *Test Only*	Closed	06/14/2007		Reyes,Ava	Reyes,Ava
168369	Abandoned Vehicle *car parked on dirt at 551, 561 and 580 frances dr.*	Closed	08/03/2008		Roman,Tisha	Anonymous
30814	Abandoned Vehicle *Black SUV has been parked on curb for almost 3 weeks.*	Closed	06/27/2006		Zamora,Danny	Anonymous
7158	Abandoned Vehicle *Black p/u with engine removed sitting on street. Also check tan colored car parked directly behind this truck because it...*	Closed	03/09/2005		Heiden,Tim	Anonymous
71048	Abandoned Vehicle *inop vehicle /flat tires*	Closed	07/17/2007		Willbond,Mary	

Figure 41 – Two Line Summary Request Output

Additional display results for the **Output Template Menu**:

- **Requestor Count**: The system will display your requests by the number of requests each citizen made.
- **Yahoo Map** – **Request Location**: Requests with a location will display on a Yahoo Map. These are especially useful for viewing the location of graffiti requests or potholes within the city and various other topics (**See Figure 42).**
- **Select Your Own Fields**: You will be able to view and sort the requests in any order.

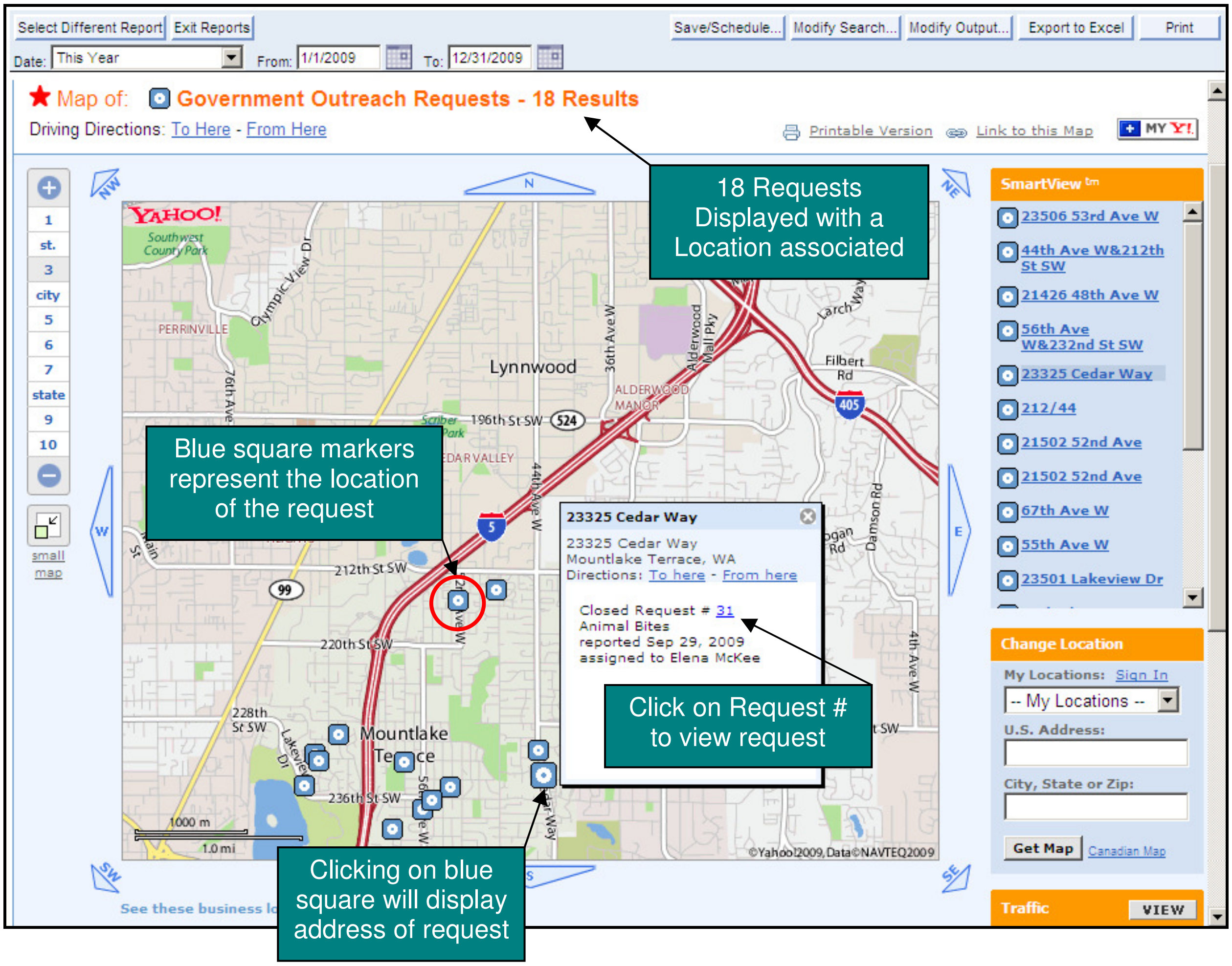


Figure 42 – Yahoo Map Report: Creating Your Own Report