PUBLICSTUFF

PUBLICSTUFF PRO

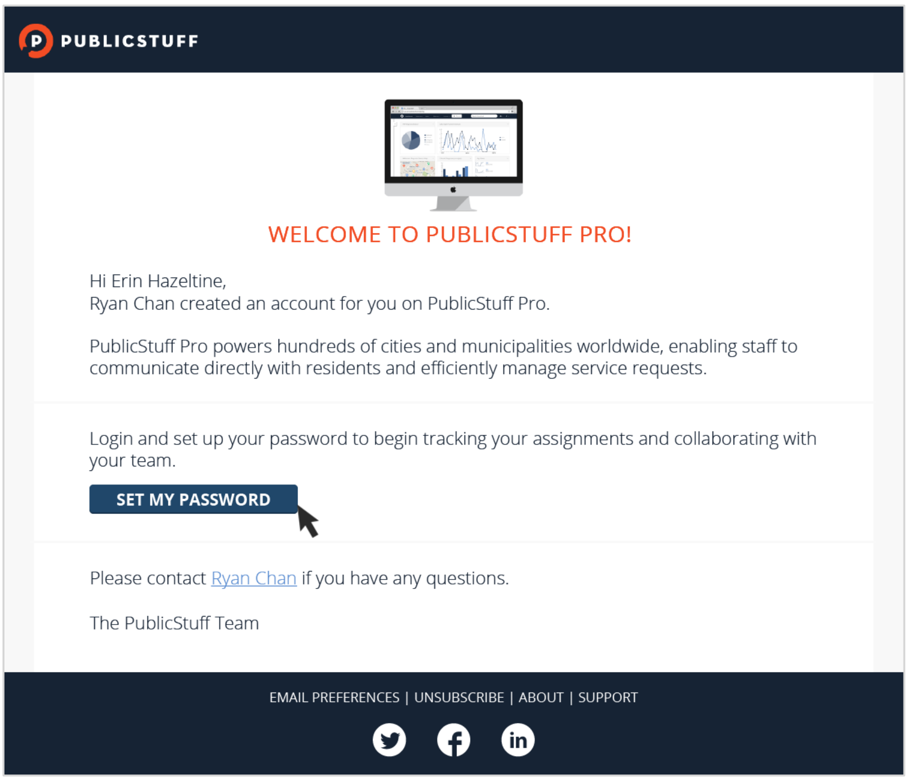
STAFF USER GUIDE

1. LOGIN

FIRST TIME USERS:

You can login to PublicStuff Pro by clicking the link in the onboarding Welcome email. You will be asked to set your password.

If the link has expired, re-enter your email address and a new email with a link to set your password will be sent to you.


PUBLICSTUFF

WELCOME TO PUBLICSTUFF PRO!

Hi Erin Hazeltine,
Ryan Chan created an account for you on PublicStuff Pro.

PublicStuff Pro powers hundreds of cities and municipalities worldwide, enabling staff to communicate directly with residents and efficiently manage service requests.

Login and set up your password to begin tracking your assignments and collaborating with your team.

SET MY PASSWORD

Please contact Ryan Chan if you have any questions.

The PublicStuff Team

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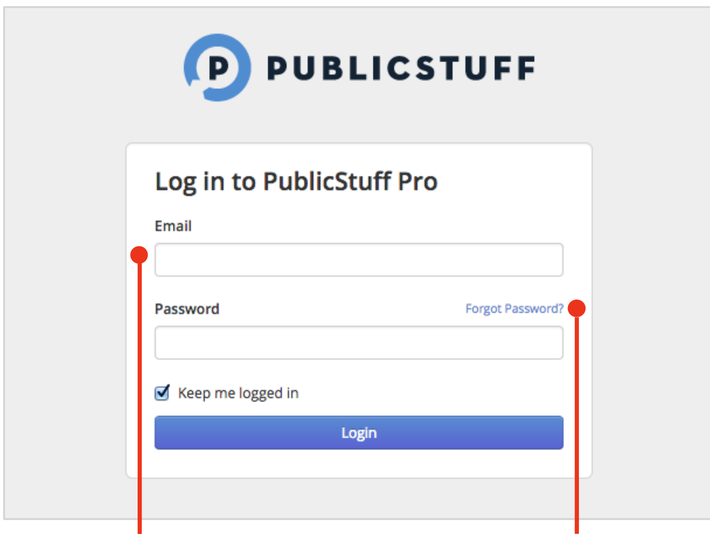
RETURNING USERS:

You can login to PublicStuff pro by navigating to gov.publicstuff.com and entering your credentials.

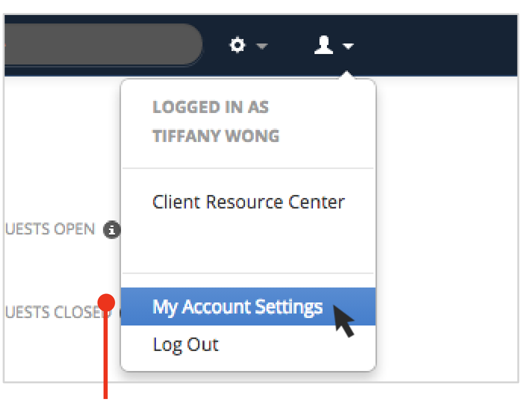
If you forget your password, you can request to have your password reset by clicking the Forgot Password link.

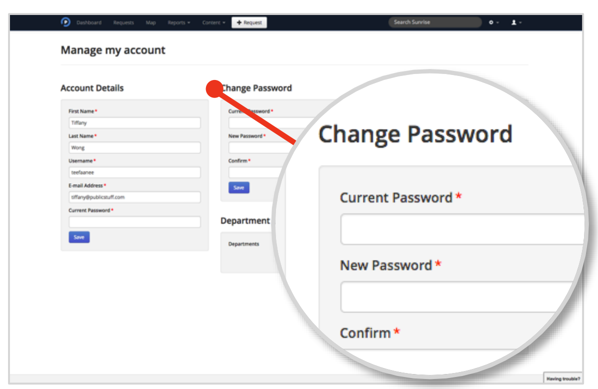
Logged in users can change their passwords by navigating to their [Account Settings]().



ENTER EMAIL

RESET PASSWORD





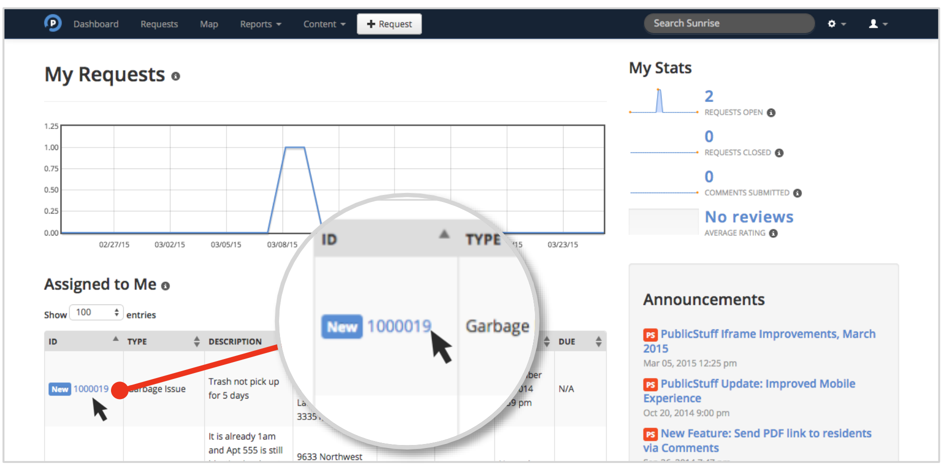
CHANGE PASSWORD

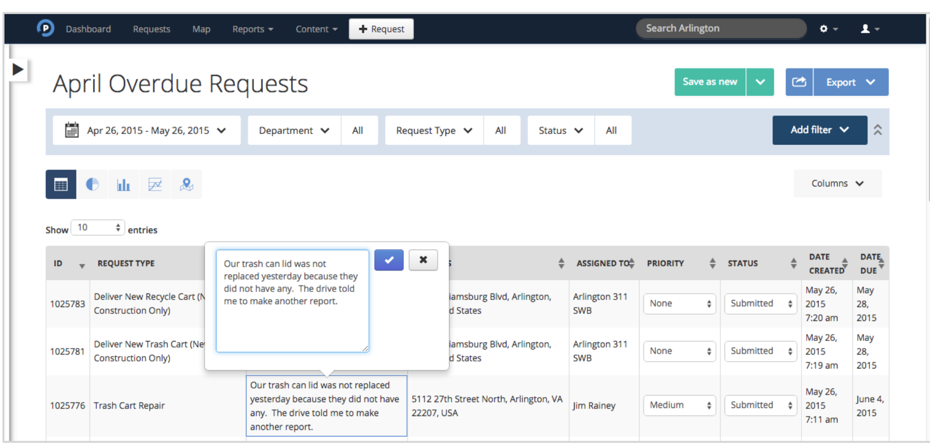
2. MANAGING REQUESTS

When a request is assigned to you, you will receive a notification email. A list of all your assignments can also be accessed directly from your Dashboard. Assignments are marked as <u>New</u> until its status is updated.

You can view the full details of the request by clicking on the link in the New Assignment email. Alternatively, details can be viewed from the Dashboard and Advanced Reporting by clicking on the Request ID.

You can manage and update your current assignments, and requests in your department that have not yet been assigned. You cannot update requests that are assigned to other staff.





3. UPDATING REQUEST STATUS

You can change the status of a request from the Request Details View or Advanced Reporting page. Select the Status drop down and update the status field. Changes are saved automatically.

There are 5 options for status:

SUBMITTED:
The municipality has not yet reviewed the request.

RECEIVED:
Viewed and acknowledged by municipality.

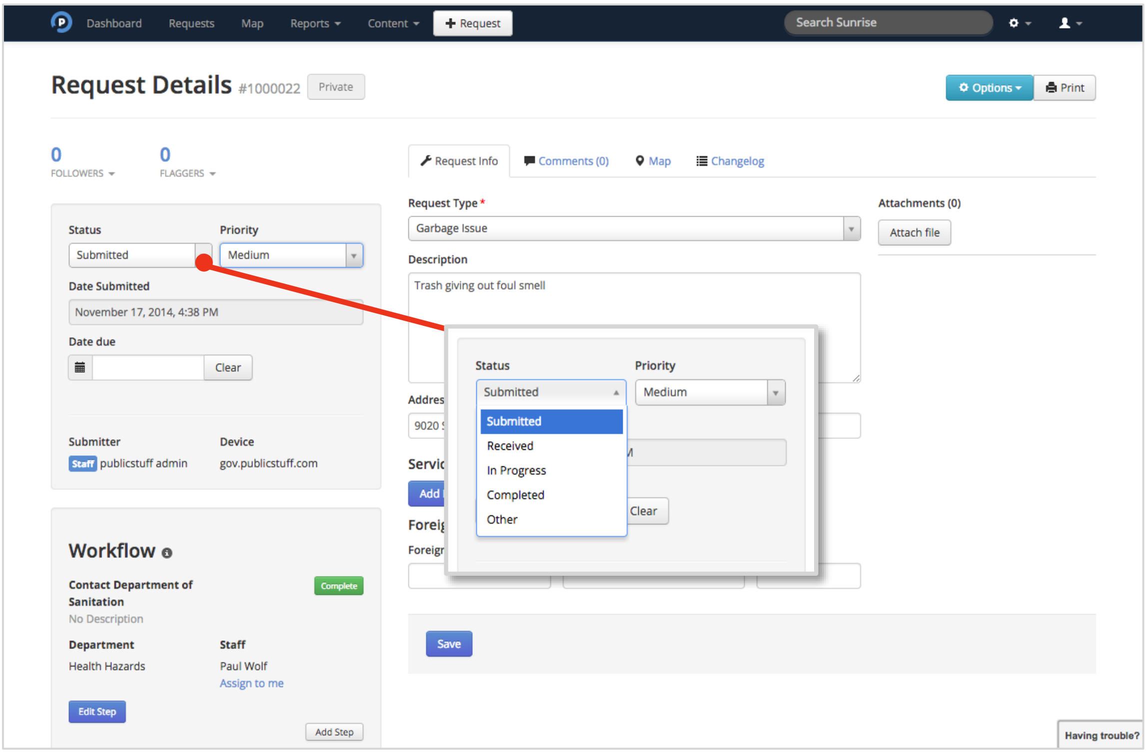
IN PROGRESS:
Work is underway to address request.

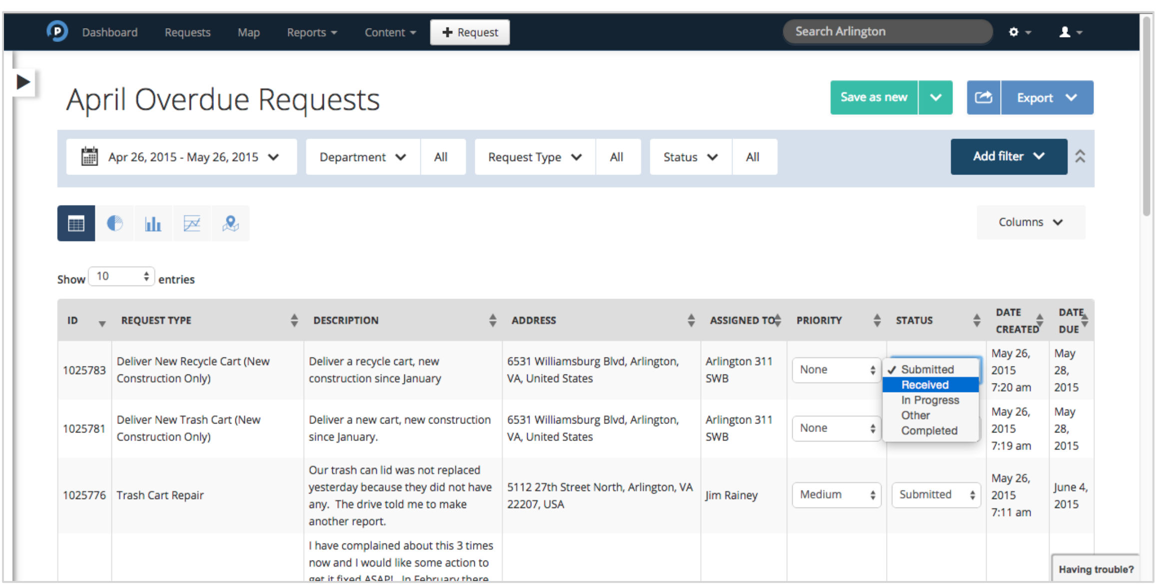
COMPLETED:
Work is completed and the request is closed.

OTHER:
Work cannot be completed at this time (You should provide an explanation through comments).

Whenever the status of a request is changed, the resident who submitted the request and any followers may receive a notification email and/or mobile push notification.

The status of a request is automatically updated to Completed when the final workflow step is completed.


Dashboard
Requests
Map
Reports
Content
Request
Search Sunrise
Request Details #1000022
Private
Options
Print
0 FOLLOWERS
0 FLAGGERS
Request Info
Comments (0)
Map
Changelog
Status
Priority
Submitted
Medium
Date Submitted
November 17, 2014, 4:38 PM
Date due
Clear
Submitter
Device
Staff publicstuff admin
gov.publicstuff.com
Request Type *
Garbage Issue
Description
Trash giving out foul smell
Attachments (0)
Attach file
Status
Priority
Submitted
Medium
Submitted
Received
In Progress
Completed
Other
Clear
Workflow
Contact Department of Sanitation
Complete
No Description
Department
Staff
Health Hazards
Paul Wolf
Assign to me
Edit Step
Add Step
Save
Having trouble?


Dashboard
Requests
Map
Reports
Content
Request
Search Arlington
April Overdue Requests
Save as new
Export
Apr 26, 2015 - May 26, 2015
Department
All
Request Type
All
Status
All
Add filter
Columns
Show 10 entries
ID
REQUEST TYPE
DESCRIPTION
ADDRESS
ASSIGNED TO
PRIORITY
STATUS
DATE CREATED
DATE DUE
1025783
Deliver New Recycle Cart (New Construction Only)
Deliver a recycle cart, new construction since January
6531 Williamsburg Blvd, Arlington, VA, United States
Arlington 311 SWB
None
Submitted
Received
In Progress
Other
Completed
May 26, 2015 7:20 am
May 28, 2015
1025781
Deliver New Trash Cart (New Construction Only)
Deliver a new cart, new construction since January.
6531 Williamsburg Blvd, Arlington, VA, United States
Arlington 311 SWB
None
May 26, 2015 7:19 am
May 28, 2015
1025776
Trash Cart Repair
Our trash can lid was not replaced yesterday because they did not have any. The drive told me to make another report.
5112 27th Street North, Arlington, VA 22207, USA
Jim Rainey
Medium
Submitted
May 26, 2015 7:11 am
June 4, 2015
I have complained about this 3 times now and I would like some action to
Having trouble?

4. COMMENTING ON A REQUEST

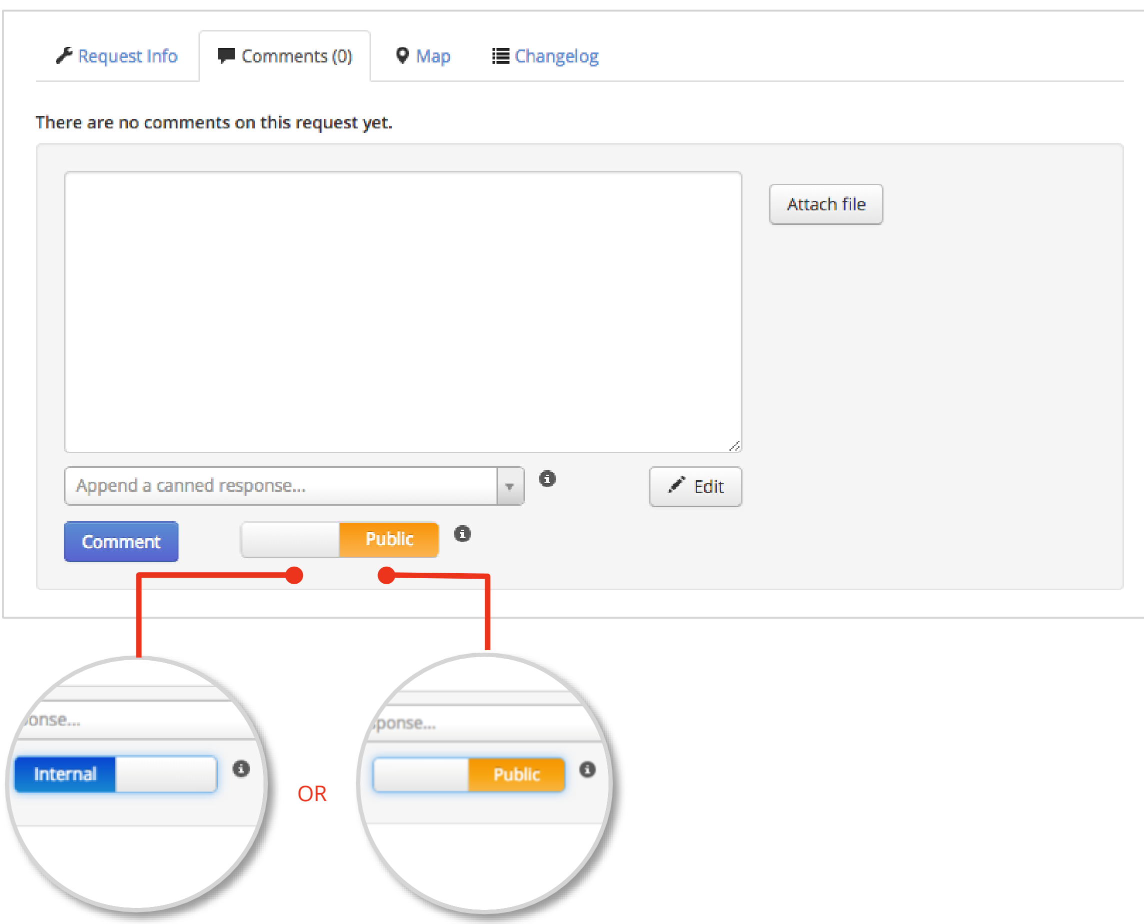
You can comment on all requests, even requests that are not assigned to you.

To communicate with residents and any resident followers, you should toggle the Comment Privacy slider to Public. The request submitter, resident followers, staff followers and workflow assignees will receive notifications when public comments are made. Both residents and staff can view public comments.

To log work or communicate internally, set the Comment Privacy slider to Internal. Only staff can view internal comments and only workflow assignees will receive notifications of these comments.

Click Comment to send it.

The history of comments, including comment content, who submitted the comment, and the date stamp are also displayed in this view.

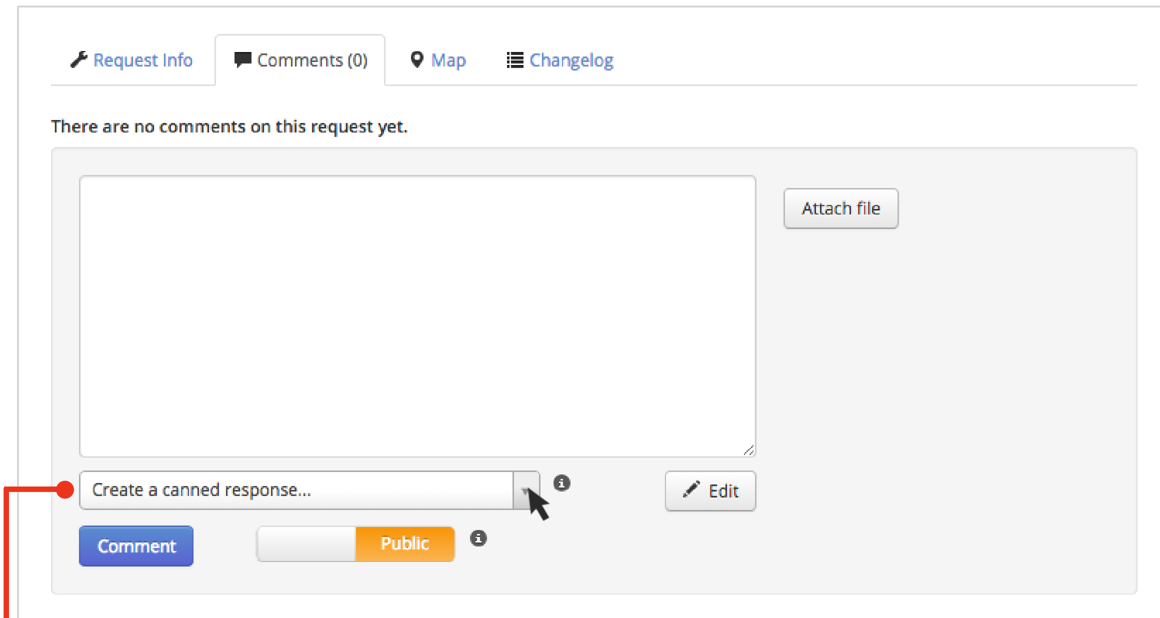


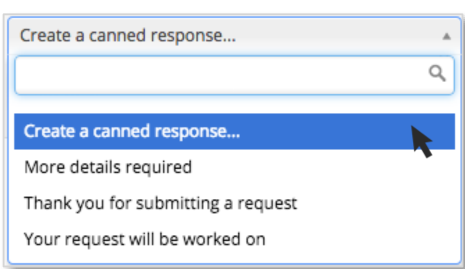
5. COMMENTING WITH CANNED RESPONSES

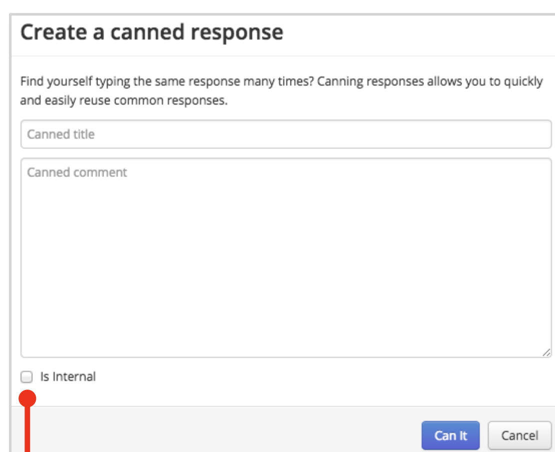
Canned Responses enable you to save and reuse frequently sent messages. You can create a Canned Response by clicking the dropdown next to “Append a canned response…” and selecting Create a canned response. Pick a title for the canned response that makes it easy to identify its purpose and content. Add the message you want to reuse.

To insert a Canned Response, click the dropdown and select the respective response. It will appear in the comment area. You can then modify the comment as appropriate.

Click Comment to send it.







Check this box if your canned response will mainly be for internal response.

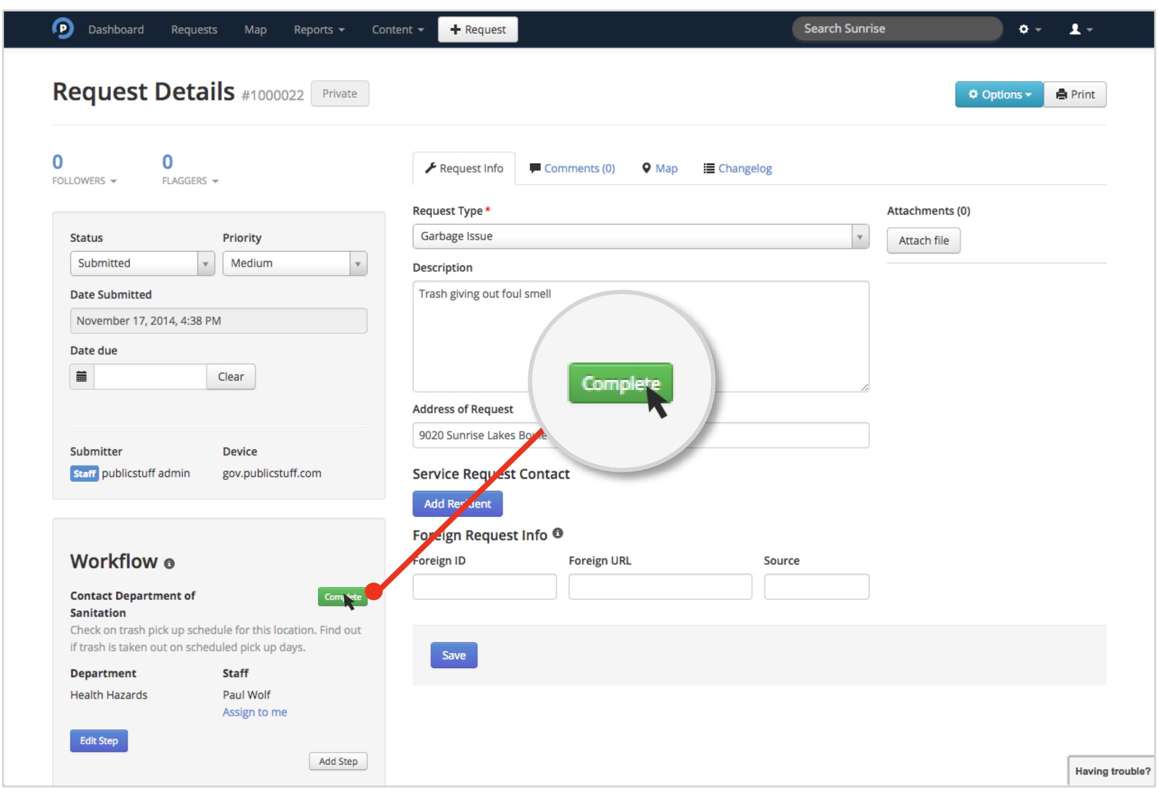
6. UPDATING WORKFLOW

Workflow refers to the steps required to complete a request. A workflow can be comprised of a series of steps assigned to multiple departments and users, or it could be a single step assigned to a single staff member.

You can reassign your requests by clicking Edit Step, altering the assignee, and then clicking Update Step. You should only reassign steps if you have made no contribution.

If you have contributed work to a request, you should Complete your workflow step. This will move it along to its next step and the staff responsible for the following step will receive an automatic assignment notification email. If have contributed work to the final step but more work is required to complete the request, you can add an additional workflow step by clicking Add Step.

In most cases, you should be completing workflow steps and adding new steps, not reassigning steps.



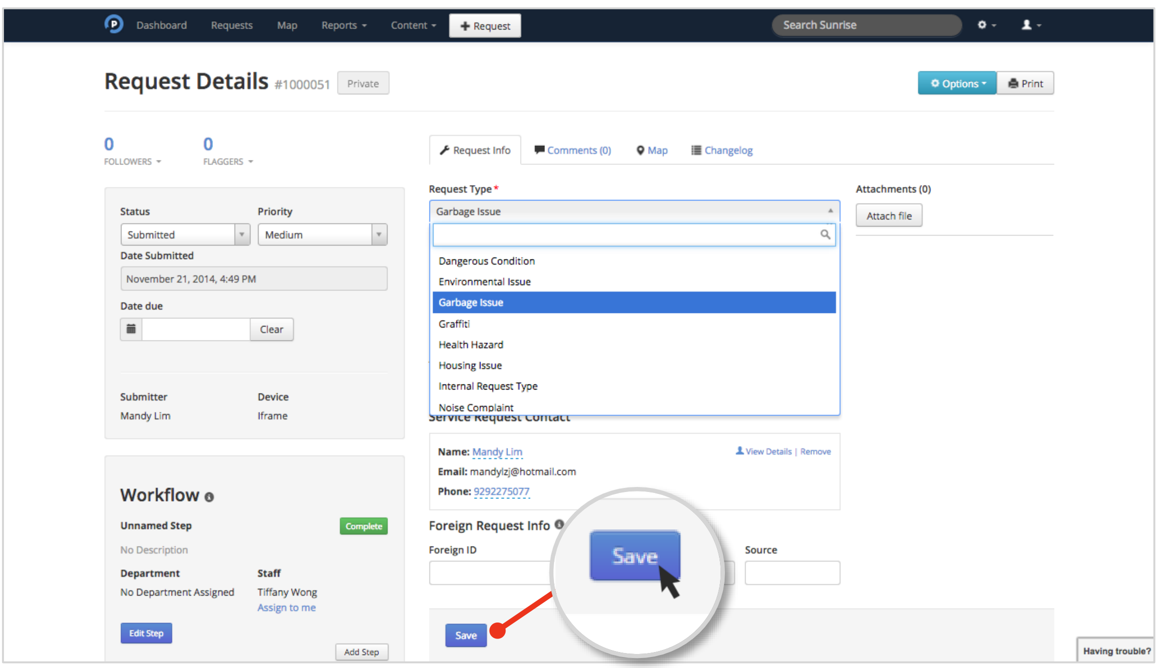
7. CHANGING A REQUEST TYPE

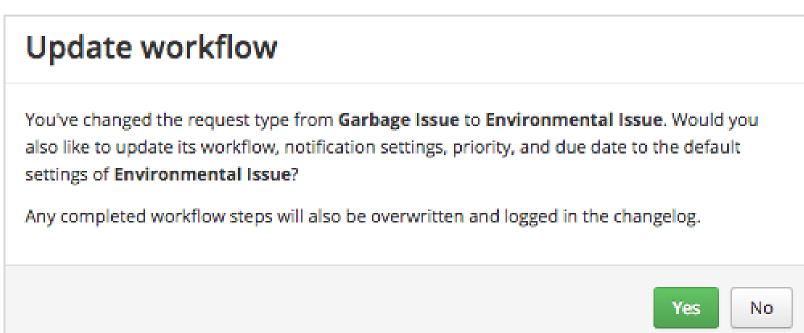
Sometimes, residents or other staff may select the wrong request type when submitting a request. You can easily change request types of open requests after they have been submitted by clicking the Request Type drop down and selecting the correct request type, and press Save.

A prompt will then appear that asks you if you also want the request to adopt the default settings of the new request type. Select Yes and the request will adopt the workflow, notification, priority, and due date settings of the new request type. Select No and the request's workflow, notifications, priority, and due date settings will remain unchanged.

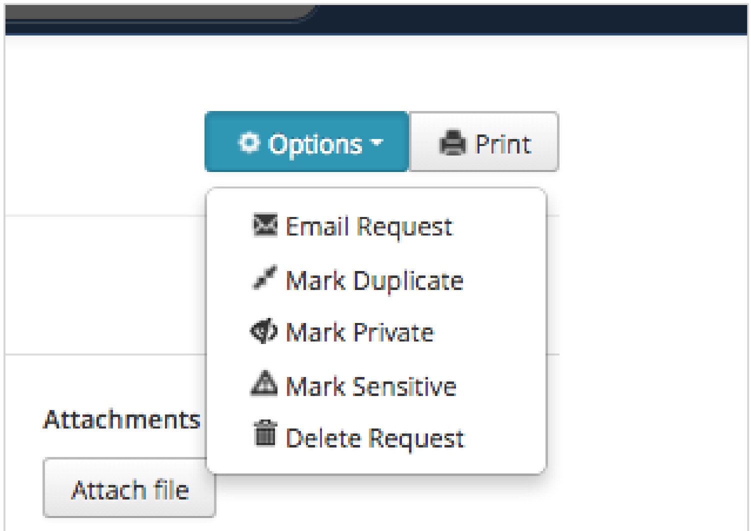
When requests are re-assigned, a workflow notification is triggered to the 1st workflow assignee, but Request Submission and Follower notifications are not triggered.

You cannot change the request type of completed requests.





8. REQUEST OPTIONS



EMAIL REQUEST:

Send the full details of a request to a contractor, council member, or other interested 3rd-party. This email will include private information, such as workflow steps, resident contact information, and internal custom fields. It should not be used to send comments to residents, nor should it be used to assign workflow steps.

MARK DUPLICATE:

Merge multiple requests that have been submitted for the same issue. The current request will be closed, and the submitter and followers of the duplicate request will become followers of the original request. If you merge a request into a private request, the resident and followers of the duplicate request will not become followers of the original private request.

MARK PRIVATE / MAKE PUBLIC:

Change the privacy settings of a request after submission. Mark requests private that contain offensive content or sensitive personal information. In most cases, you should not make requests public that residents set to private.

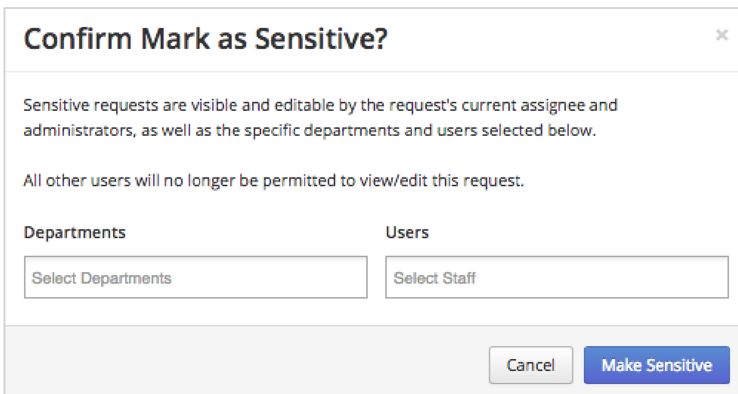
Private requests are visible only to the submitter and staff. Public requests will be visible to all residents and staff.

MARK SENSITIVE:

Limit the staff who can view and edit a request. Site admins and assignees can always view sensitive requests. Additionally, you can use the dropdown to create a list of other departments and staff who should be allowed to view and edit the request.

Only the resident submitter can view their own sensitive requests.

> **!** Make sure to add yourself to the list to maintain your ability to view and edit the request.



DELETE REQUEST:

Remove all records of a request from the system. The only requests we ever recommend deleting are those that were inadvertently created by staff.

> Note:
> - Requests submitted for the same issue should be Marked Duplicate,
> - Requests missing important information should be Completed
> - Miscategorized requests should have their request type changed.

9. CREATING NEW REQUESTS FROM PHONE OR OTHER SOURCES

You should use + Request to submit requests on behalf of residents who call-in, walk-in, or email their issue. You can also submit new internal requests.

Select a request type and enter all relevant details about the request. A request's workflow, priority, due date, and privacy settings can all be changed prior to submission. When all required fields are completed, click Submit.

If you're adding a request on behalf of the resident, follow these steps to add contact information to the request.

1. Click Add in the Service Request Contact section
2. Determine if the resident already has a registered account by searching for the resident by their first name, last name, or email address. If a match is found, select that user.
3. If there is no matching user, click Add Contact.
4. Enter the details of the contact. If an email is provided, an account will automatically be created for the contact, and they will receive email notifications as their request is updated and comments are added. If no email is provided, no account will be created but the residents' contact details will be added to the request.