



# PUBLICSTUFF

## BEST PRACTICES

### CREATING A POTHOLE REQUEST

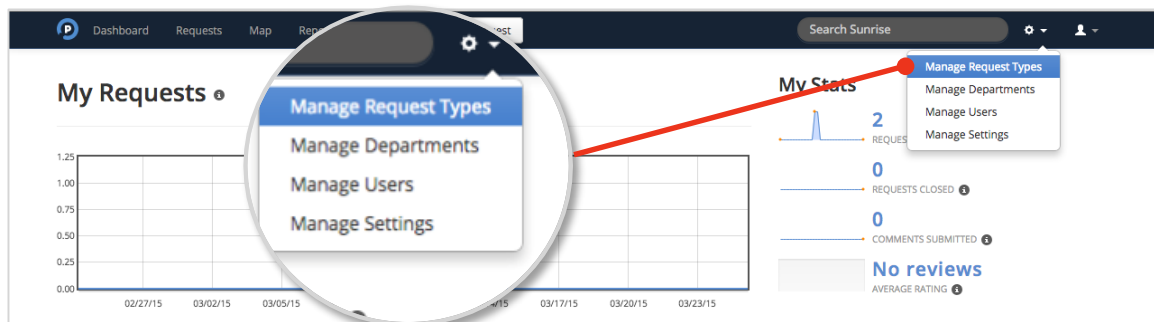
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PublicStuff request types can be easily and intuitively configured. To illustrate the request type creation process, this guide walks you through a Pothole request type, workflow, and notifications.

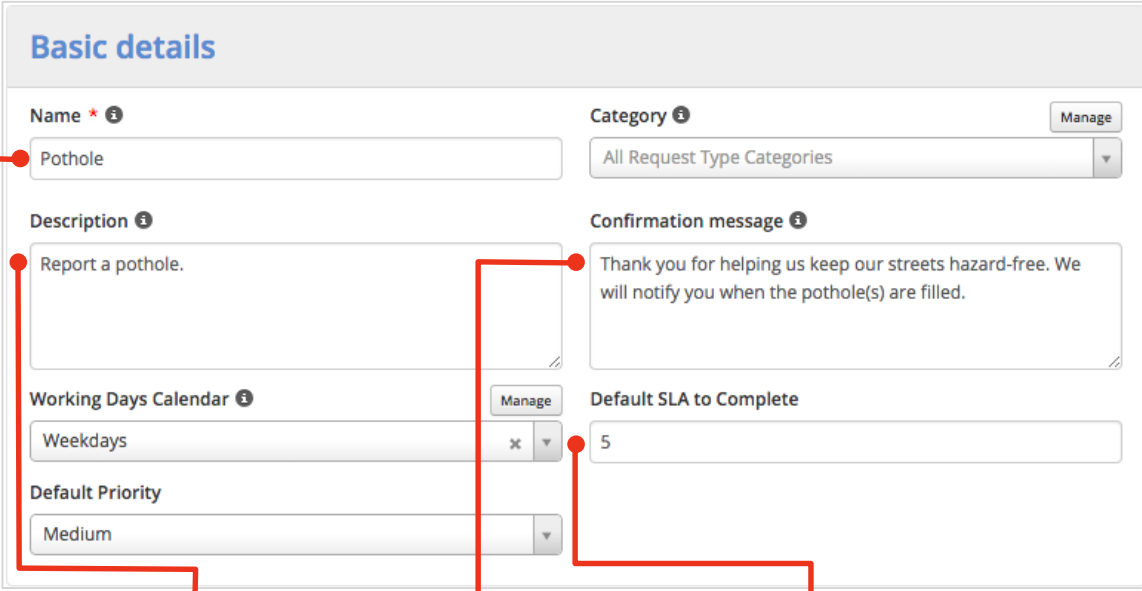
In this guide, the pothole requests will be assigned to staff in the Road Maintenance department, Jane Smith and William Hudson, who are assigned steps in the workflow. Their supervisor, Paul Wolf, will receive notifications on the day the request is due. If the request is not completed on time the department director, Alice Patrick and Paul Wolf will receive a notification. Zachary Jensen from the Traffic department who is interested in the progress of this request type will receive notifications as a follower.

## 1. NAVIGATE TO THE MANAGE REQUEST TYPES TAB



## 2. CONFIGURE YOUR REQUEST TYPE'S BASIC DETAILS

Basic details section is customized to gather and display important information about the request.



**Basic details**

Name \* ⓘ Pothole

Category ⓘ All Request Type Categories Manage

Description ⓘ Report a pothole.

Confirmation message ⓘ Thank you for helping us keep our streets hazard-free. We will notify you when the pothole(s) are filled.

Working Days Calendar ⓘ Weekdays Manage

Default Priority Medium

Default SLA to Complete 5

1. REQUEST TYPE NAME      2. DESCRIPTION

3. CONFIRMATION MESSAGE      4. DUE DATE CALCULATION

### 1. REQUEST TYPE NAME

Choose a name that is easily recognizable by your residents/staff, and that fully represents the provided service.

### 2. DESCRIPTION

Keep descriptions short. Use the description field to clarify what services are offered through the respective request type.

### 3. CONFIRMATION MESSAGE

You can add a message that appears for residents and staff. After a request is successfully submitted, a confirmation email with a tracking number is sent. Use this field to provide SLA estimates and/or follow-up instructions.

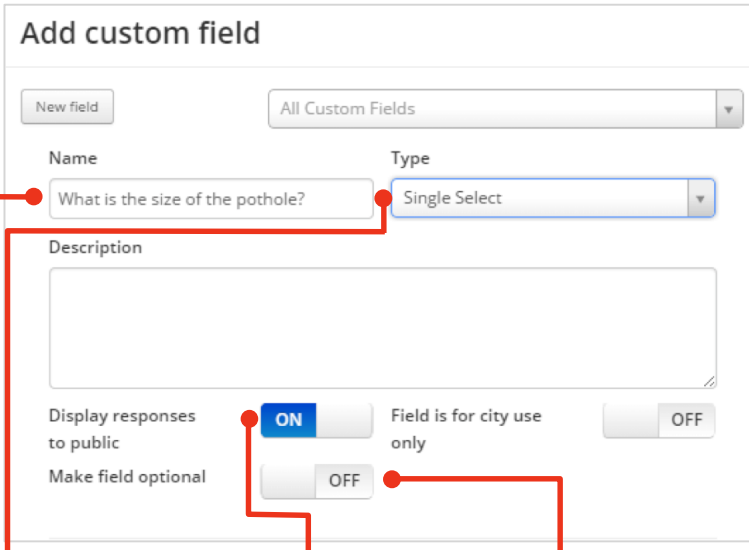
### 4. DUE DATE CALCULATION

Add an SLA in number of days. If a default SLA is not provided, all submitted requests will have their due dates automatically set.

### 3. POPULATE CUSTOM FIELDS

Use custom fields to gather additional required and/or optional information about a request. In custom fields, Advanced Reporting permits residents to search and filter request types.

STEPS TO CREATE SINGLE SELECT CUSTOM FIELDS:



The screenshot shows the 'Add custom field' interface. A red line connects the 'Name' field 'What is the size of the pothole?' to the label '1. CUSTOM FIELD QUESTION'. Another red line connects the 'Type' dropdown 'Single Select' to the label '2. TYPE OF QUESTION'. A third red line connects the 'Display responses to public' toggle (set to 'ON') to the label '3. MAKE VISIBLE TO PUBLIC'. A fourth red line connects the 'Make field optional' toggle (set to 'OFF') to the label '4. MAKE FIELD OPTIONAL'. The 'Field is for city use only' toggle is also visible and set to 'OFF'.

#### 1. CUSTOM FIELD QUESTION

Enter clear and specific questions. Vague and overly broad questions will elicit poor responses.

#### 2. TYPE OF QUESTION

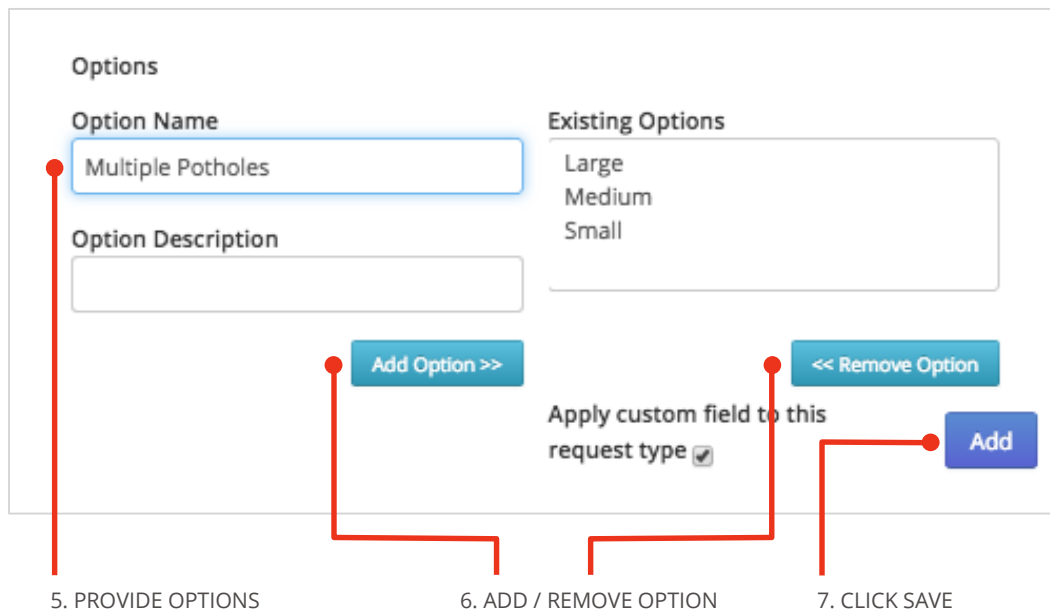
Use single-select, multi-select, and checkbox custom fields when asking closed-ended questions, and when attempting to gather structured data. Use the text custom field to when asking open-ended questions.

#### 3. MAKE VISIBLE TO PUBLIC

A submitter's response to a custom field question can be made publicly visible or private. If toggled ON, other residents will be able to view the response. If it is OFF, only staff will be able to view the response. Custom field questions that ask for private/personal information should remain toggled OFF. Custom fields in private requests will default to private.

#### 4. MAKE FIELD OPTIONAL

Responses to custom field questions are set either as required or optional. If required, the resident/staff will need to provide a response in order to submit the request.



#### 5. PROVIDE OPTIONS

The configuration of predetermined response options is set to multi-select and/or single-select custom field questions.

#### 6. ADD/REMOVE OPTION

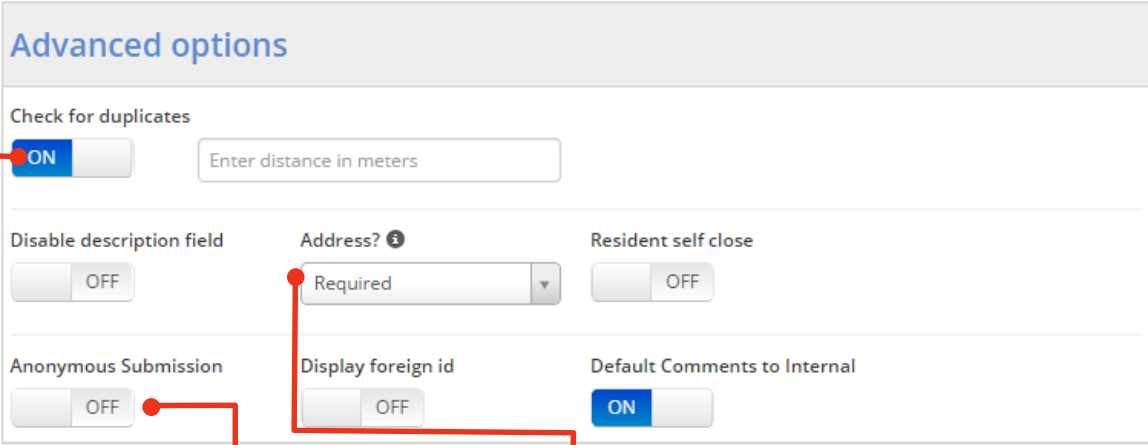
Add an option to the custom field question by clicking Add Option. To remove existing options, select the option and then click Remove Option.

#### 7. SAVE

Click save to create the custom field.

#### 4. CONFIGURE ADVANCED OPTIONS AND PRIVACY SETTINGS

Advanced options are additional customizations can be made to a request type. Privacy settings determine who can submit the request, view the request, and edit the request.



**Advanced options**

Check for duplicates  
 ON

Disable description field  OFF

Address? ⓘ

Resident self close  OFF

Anonymous Submission  OFF

Display foreign id  OFF

Default Comments to Internal  ON

1. CHECK FOR DUPLICATES      2. ANONYMOUS SUBMISSION      3. ADDRESS REQUIRED

##### 1. CHECK FOR DUPLICATES

Turn on duplicate detection if you want potential duplicate requests displayed on the Request Creation view. Confine the detection zone by setting a search radius in meters.

##### 2. ANONYMOUS SUBMISSION

Allow residents to submit requests anonymously or require an account for submission. We recommend allowing anonymous submissions only for highly sensitive request types, such as complaints, illegal activity, etc.

##### 3. ADDRESS REQUIRED

A request type's address field can be set to required, optional, or disabled. Select "required" for request types that can be geographically located. Select "optional" for request types that may lack a precise geographic location. Select "disabled" for request types where location is irrelevant i.e. Permit Application.



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## CREATING A POTHOLE REQUEST

**Privacy**

Display this request type to the public?  
 ON  
Residents and staff will be able to submit requests of this type.

Mark all submitted requests of this type Private?  
 OFF  
Residents have the option to set request privacy.

Mark all requests of this type Sensitive?  
 OFF  
All staff will be able to view requests of this type.

4. SUBMISSION   5. BROWSING   6. SENSITIVITY

#### 4. SUBMISSION (PUBLIC VS. STAFF-ONLY)

To allow both residents and staff to submit requests, set this toggle to ON. To create a request type that is submissible by staff only, set the toggle to OFF. An internal IT work order is an example of a staff-only request type.

#### 5. BROWSING (PRIVATE VS. PUBLIC)

To submit all requests so only staff can view them, set the toggle to OFF. To permit the submitter of the request to determine whether other residents can view the request, set the toggle to OFF. In most cases, we recommend that the toggle be set to OFF. A code violation request is an example of a request type that should remain Private.

#### 6. SENSITIVITY

To limit the staff who can view and edit a request, set that request type to sensitive. Residents, except the submitter, can never view sensitive requests. Site admins and assignees can always view sensitive requests.

## 5. SETTING UP WORKFLOWS AND NOTIFICATIONS

### WORKFLOWS

Set up a default workflow for your request type. Generally, configure at least one-step for most workflows. Once you submit a request, workflow steps may be added, edited, and deleted. Staff will receive notifications when assigned requests appear.

Here is an example of a pothole workflow:

### Workflow

**Step 1: Confirm reported pothole**  
Verify location of reported pothole

<b>Department</b> Road Maintenance	<b>Staff</b> Jane Smith <a href="#">Assign to me</a>
---------------------------------------	------------------------------------------------------------

[Edit Step](#)

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**Step 2: Dispatch work crew to repair pothole**  
Send work crew to repair pothole

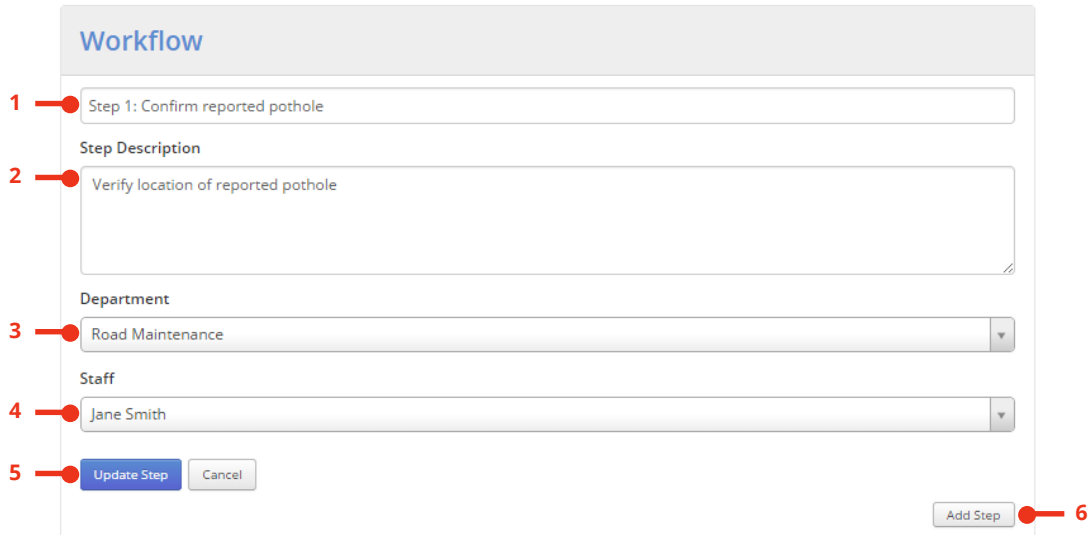
<b>Department</b> Road Maintenance	<b>Staff</b> William Hudson <a href="#">Assign to me</a>
---------------------------------------	----------------------------------------------------------------

[Edit Step](#)

[Add Step](#)



## STEPS TO ASSIGN WORKFLOW:



The screenshot shows a 'Workflow' form with the following elements:

- 1**: A text input field containing 'Step 1: Confirm reported pothole'.
- 2**: A text area containing 'Verify location of reported pothole'.
- 3**: A dropdown menu for 'Department' with 'Road Maintenance' selected.
- 4**: A dropdown menu for 'Staff' with 'Jane Smith' selected.
- 5**: Two buttons: 'Update Step' (highlighted in blue) and 'Cancel'.
- 6**: An 'Add Step' button located at the bottom right of the form.

### 1. NAME STEP

The step name should summarize the required action.

### 2. STEP DESCRIPTION

Description should enumerate the detailed tasks required to complete the step.

### 3. ASSIGNED DEPARTMENT

Select a department that should own the completion of the workflow step. The department selected will affect viewing and editing rights for the request. Requests are also searchable in [Advanced Reporting](#) by their assigned department.

### 4. ASSIGNED STAFF

Select a user who should own the completion of the workflow step. The assigned user will always be able to view and edit the request. Requests are also searchable in [Advanced Reporting](#) by their assigned user.

### 5. UPDATE STEP

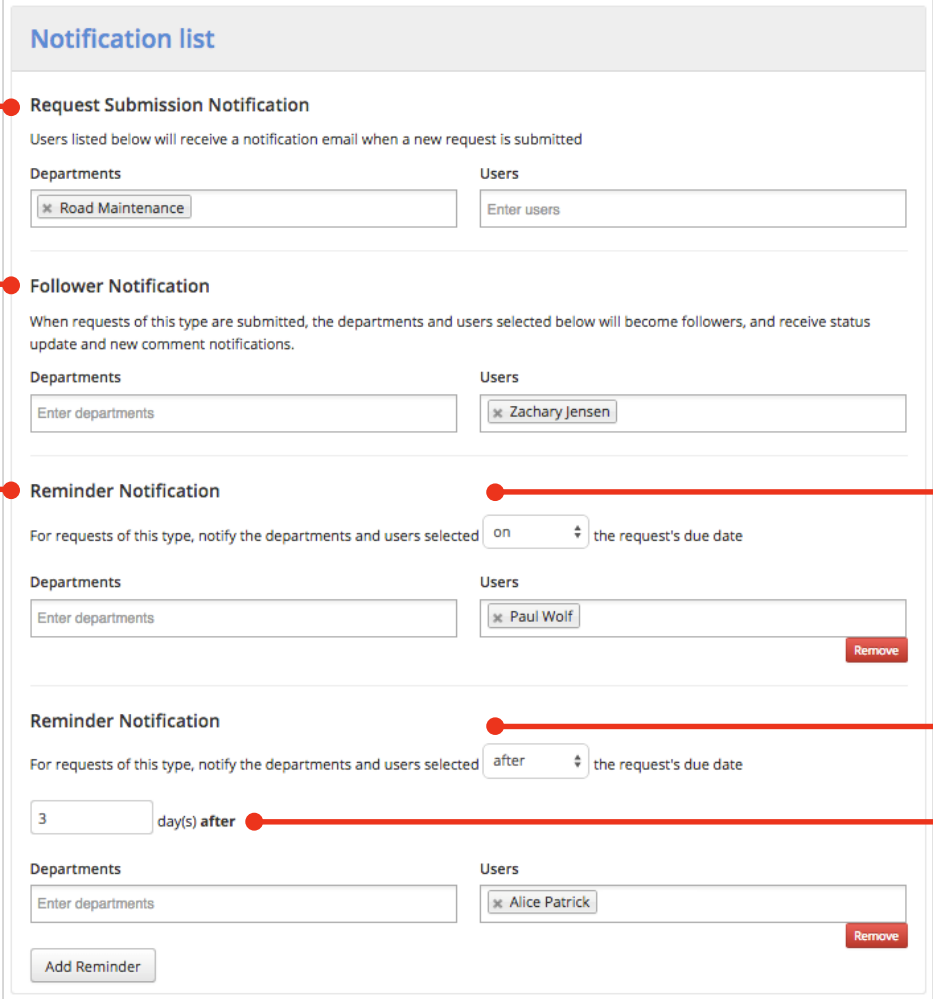
Click to save your changes.

### 6. ADDITIONAL STEPS

To add additional workflow steps, click [Add Step](#).

## NOTIFICATIONS

Notifications continue to keep departments and staff informed of requests, even if he/she is unassigned to a particular request. There are three types of notifications: Request Submission, Follower, and Reminder.



The screenshot shows a 'Notification list' interface with three notification types. Red callouts are placed as follows: 1 points to the 'Request Submission Notification' title; 2 points to the 'Follower Notification' title; 3 points to the 'Reminder Notification' title; and 4 points to the 'Remove' button next to the user 'Paul Wolf' in the first reminder notification.

**Notification list**

**1** **Request Submission Notification**  
Users listed below will receive a notification email when a new request is submitted

Departments:  Users:

**2** **Follower Notification**  
When requests of this type are submitted, the departments and users selected below will become followers, and receive status update and new comment notifications.

Departments:  Users:

**3** **Reminder Notification**  
For requests of this type, notify the departments and users selected on the request's due date

Departments:  Users:

**Reminder Notification**  
For requests of this type, notify the departments and users selected after the request's due date

day(s) after

Departments:  Users:

### 1. REQUEST SUBMISSION NOTIFICATION

Set a request submission notification if you want departments and staff alerted when requests are submitted. Users who receive this notification will not obtain any subsequent notifications when its status changes. Call centers will commonly set up request submission notifications to alert all their representatives when a request is submitted.

Follower Notifications allow individual users and departments to receive notifications and submission emails, if specified in the request.



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### 2. FOLLOWER NOTIFICATION

Set up follower notifications for departments and staff when requests are submitted, comments are made, and its status changes. Users can unfollow individual requests from the Request Details view.

### 3. REMINDER NOTIFICATION

Set up reminder notifications to alert departments and staff when requests near, reach, or exceed their due date. On a daily basis, users will receive a digest reminder email that lists each relevant request. Requests will remain listed on the email, until they are completed or their due date is changed.

### 4. TIME OF REMINDER

Set the amount of time relative to the request's due date (before, on, after) to trigger a reminder notification. For example, you can configure a reminder notification to start being sent to a staff user 5 days before it's due, while configuring a separate reminder notification to be sent to a manager 1 day after it's due.