








BEGINNERS ROMULUS GUIDE

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ICON KEY

Symbol	Meaning
 Box	Inbox
 Wrench	Service requests
 Scales	Community Issues
 Person	Constituents
 Pillars	Organizations
 Check box	Pending Tasks
 Clock wheels	Settings, contact info, preferences, response templates


SERVICE REQUEST GUIDE

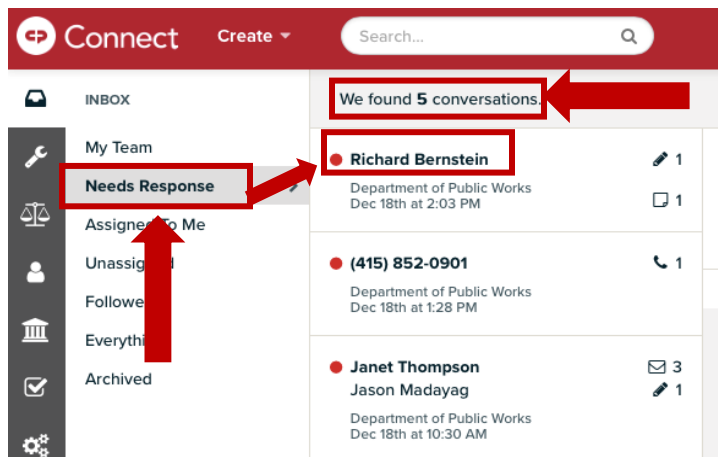
ASSIGNED STAFF	DIVISION TAG	RESPONSIBILITIES
Aaron Tubs	PARKS DIVISION	<ul style="list-style-type: none"> - Ball fields - Islands/medians - General park questions - General questions - Safety (Mark, Aaron, Brendan)
Brendan Mitchell	PARKS DIVISION	<ul style="list-style-type: none"> - Pools - Trees - Parkettes
Gabe Dias	STREETS DIVISION	<ul style="list-style-type: none"> - Street and Curb Paint and signs - Street sweeping - Graffiti - Illegal Dumping
John Shindelus	STREETS DIVISION	<ul style="list-style-type: none"> - Paving - Pump maintenance - Vegetation removal in certain locations - Storm drainage & emergency response (CC Mark)
Lauren Davini	TRAFFIC DIVISION	<ul style="list-style-type: none"> - Traffic lights - Stop sign request - Crosswalk/midblock request - Tamalpais bike lane
Ryan Montes	GARAGE DIVISION	<ul style="list-style-type: none"> - PD vehicle repair - Non-PD vehicle repair
Omar Garcia	FACILITIES	<ul style="list-style-type: none"> - Usually automated through employee website - Pest control - Facility Issues
Appropriate staff member according to inquiry request	DPW GENERAL INQUIRY	<ul style="list-style-type: none"> - General inquiries that do not fall into any of the other categories
Diane Dillon	ENCROACHMENT PERMIT	<ul style="list-style-type: none"> - Encroachment Permits - Construction Inspection - Construction complaints
Willie Lagleva	TRAFFIC DIVISION	<ul style="list-style-type: none"> - Anything PODS/Debris Box - Traffic control devices (traffic lights, pedestrian signals)
Josh Minshall	LAND DEVELOPMENT	<ul style="list-style-type: none"> - Land development - Grading - Water Course

ANSWERING AN INQUIRY FROM INBOX:

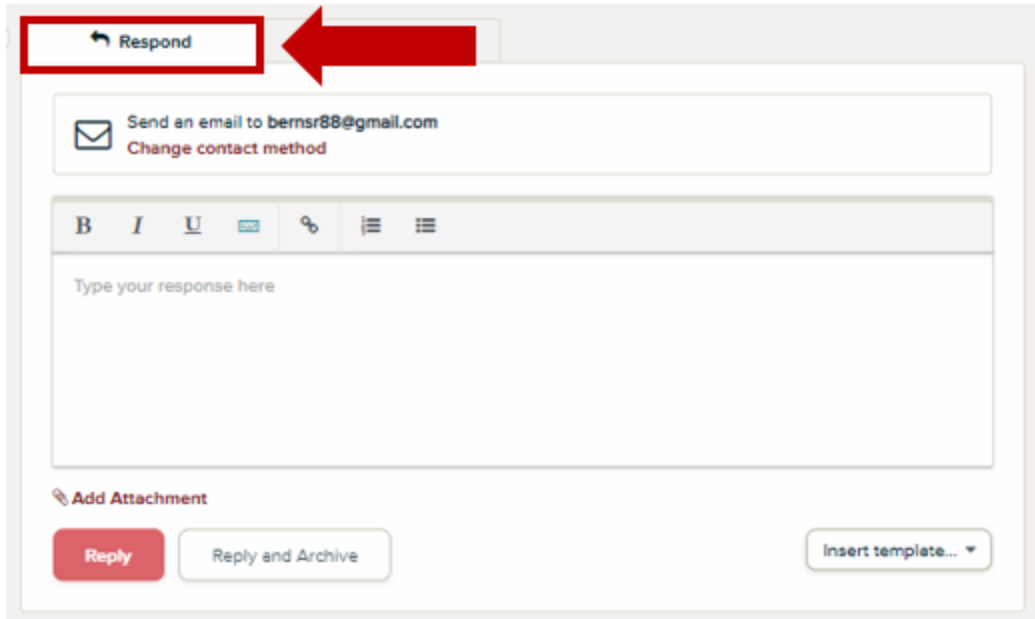
Inquiry Checklist:

- Send service request if needed
- Tag service request with appropriate division tag (shown on table in page 3)
- Respond to resident, if service request made provide resident with an update (inform of service request sent to specific division)

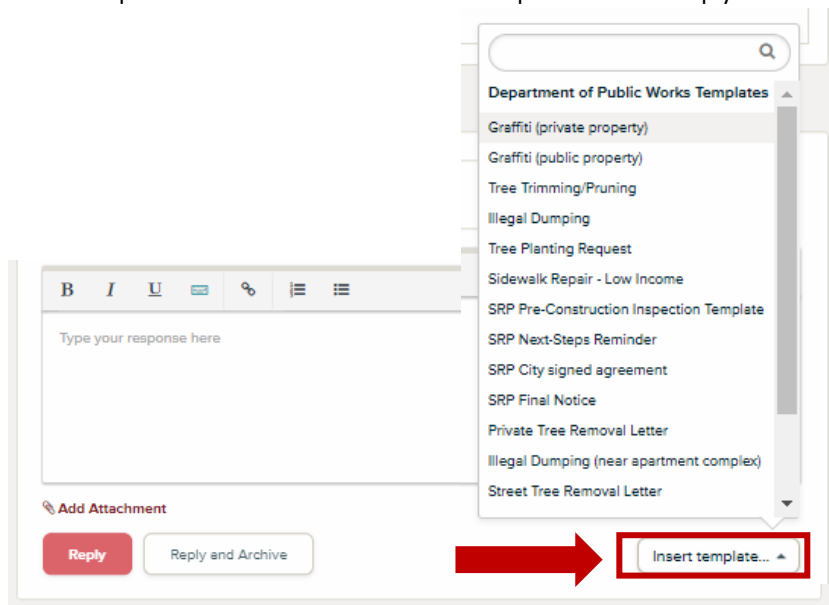
1. Go to inbox 
2. Click “Needs Response” to view **unanswered** Romulus inquiries. Number of unanswered conversations will appear on top of new inquiries. Unanswered inquiries will have a red dot appear next to the name of the resident.



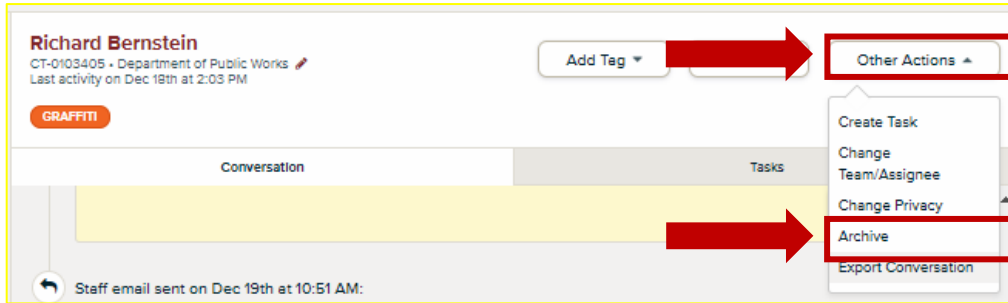
3. Click on name or red dot next to message to view recent inquiry.
4. An inquiry requires action from DPW, create a service request (for instructions on how to create a service request see [“Service Request”](#)). If you are still able to answer their inquiry, please answer service request by using the **“Respond”** section. Once the inquiry has been answered the red dot will disappear. Once you have answered the inquiry follow the instructions in the [“Changing Status”](#) section.



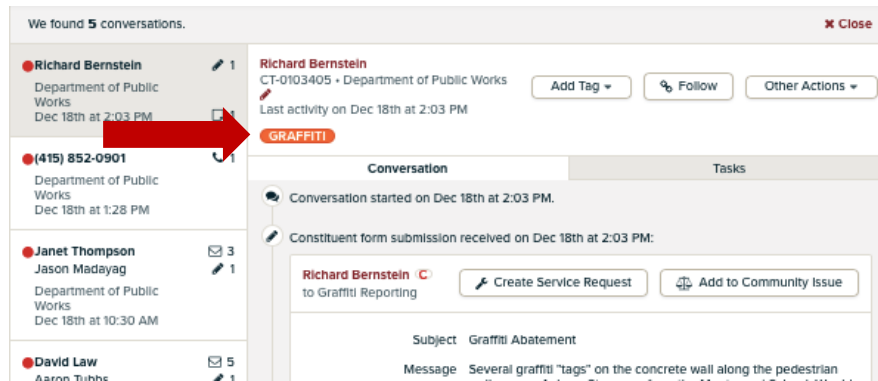
- To insert an automated response, hit the “Insert template” drop-down menu at the lower right corner of the respond message.
Select the desired template from the list to insert in the response box. Hit reply to send message.



- Archive inquiry if no further action is needed. This removes inquiry from the inbox. Click the “Other Actions” drop down menu on the upper right side of the inquiry. Click “Archive” to archive conversation.



- Some inquiries will come pre-tagged with a topic, those are inquiries from specific contact forms on our website. The example below has been pre-tagged as “GRAFFITI”.



ANSWERING AN INQUIRY FROM SERVICE REQUEST:

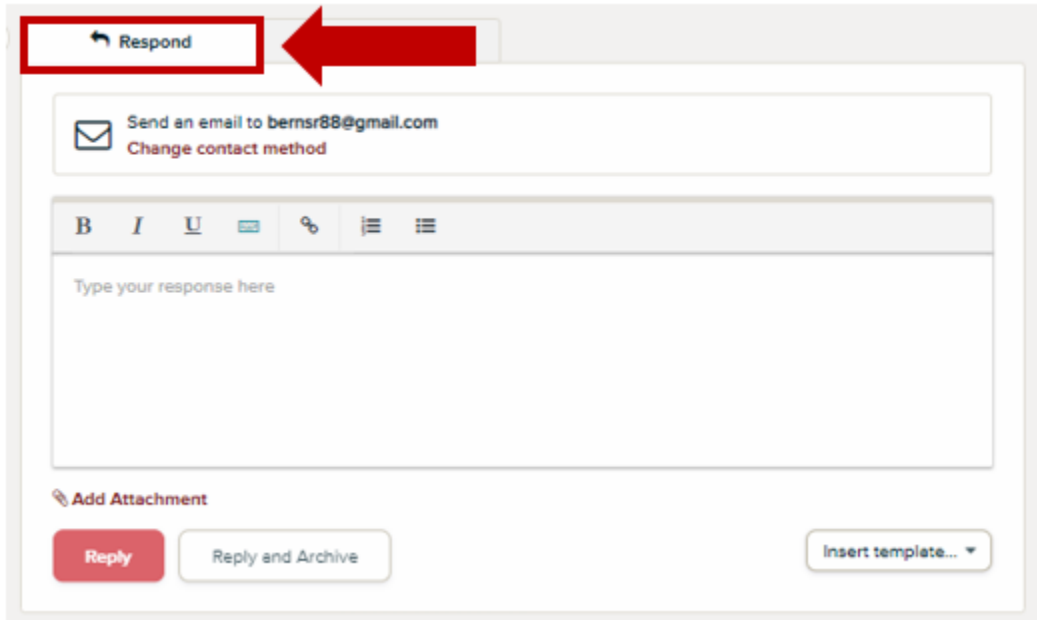
- While on the service request go to the conversation tab.



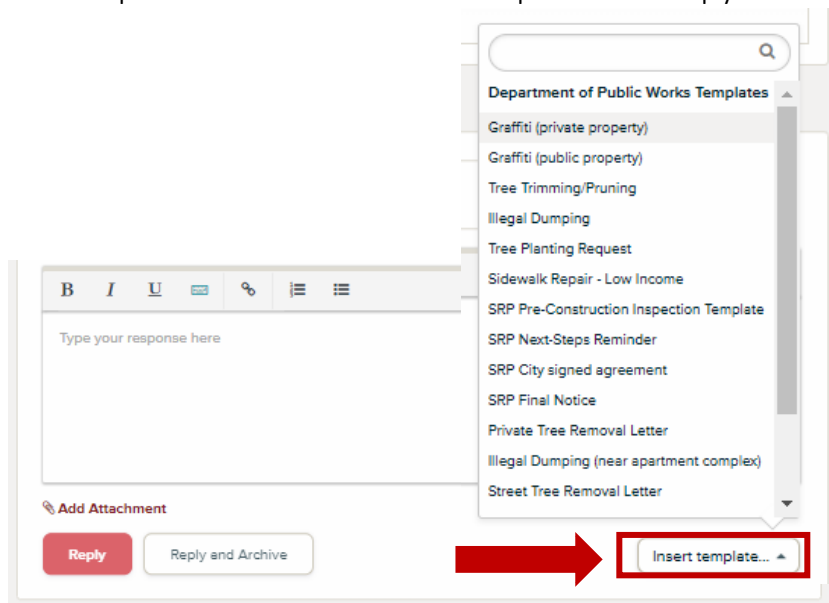
- Click on the arrow on the far right of the message you want to reply to.



- An inquiry requires action from DPW, create a service request (for instructions on how to create a service request see "[Service Request](#)").

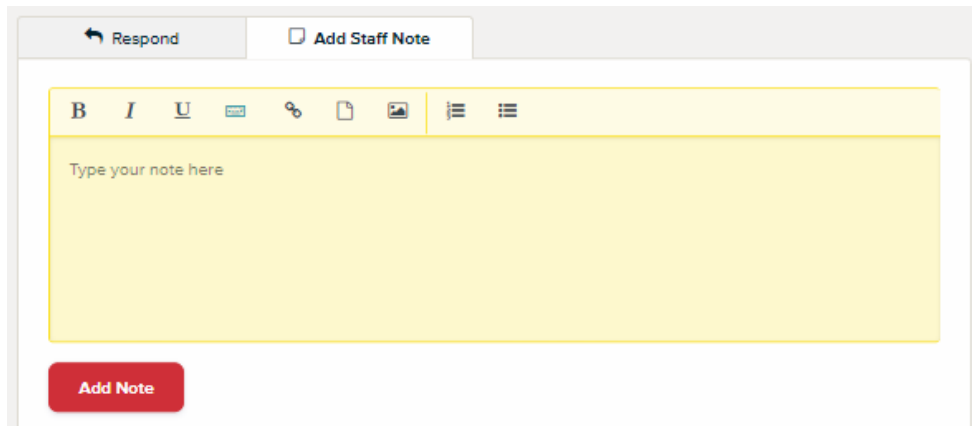


- To insert an automated response, hit the "Insert template" drop-down menu at the lower right corner of the respond message. Select the desired template from the list to insert in the response box. Hit reply to send message.



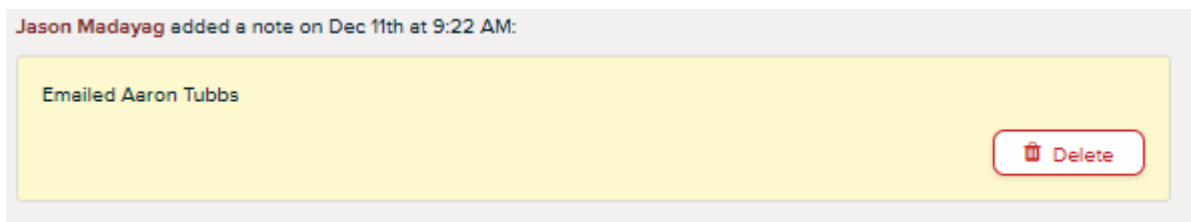
ADDING NOTE TO CONVERSATION:

- Notes are added to service request or inquiry messages to update others on Romulus about the inquiry.



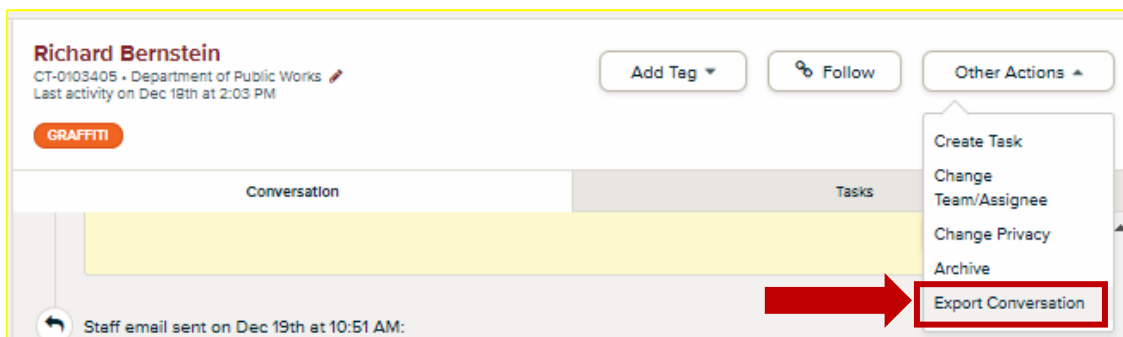
The screenshot shows a user interface for adding a staff note. At the top, there are two tabs: 'Respond' and 'Add Staff Note'. Below the tabs is a text area with a yellow background and the placeholder text 'Type your note here'. Above the text area is a rich text editor toolbar with icons for bold (B), italic (I), underline (U), link, unlink, insert image, and list. Below the text area is a red button labeled 'Add Note'.

If you are in the process of researching an answer, add it in the notes to update others on the DPW Team. It's also helpful to add if you have emailed another staff member requesting a response for the resident.



EXPORTING CONVERSATION:

1. Exporting a conversation: not all DPW staff is on Romulus (i.e. Project Manager). Inquiries are exported into a pdf and emailed to staff when their expertise is needed. To export click on "Other Actions" drop down menu, select "Export Conversation," a pdf of the conversation will pop up.



TRANSFERRING CONVERSATIONS:

There will be times when a constituent's request belongs to another department. When this occurs you will need to transfer the conversation to another department. There will be no need to create a service request unless this case also involves DPW.

1. While on the conversation. Click the pencil icon and a new menu will appear.

The screenshot shows a user interface for managing conversations. On the left, there is a list of four conversations:

- Linda Garb**: Nallely Manriques, Department of Public Works, Jan 22nd at 6:58 PM. 3 messages, 1 edit.
- Geremy Cohen**: Department of Public Works, Jan 22nd at 3:42 PM. 1 message, 1 edit.
- Jeffrey Wilson**: John Shindelus, Thomas Wong, Nallely Manriques, Christine Foster, Department of Public Works, Jan 18th at 10:12 AM. 11 messages, 2 edits.
- Jennifer Mitchell-Basilio**: Mark Wright, Talia Smith, Nallely Manriques, Department of Public Works, Jan 17th at 5:26 PM. 5 messages, 1 edit.

On the right, the detailed view of the conversation with **Geremy Cohen** is shown. The conversation ID is CT-0105029, Department of Public Works, with last activity on Jan 22nd at 3:42 PM. A red box highlights a pencil icon next to the name, with a red arrow pointing to it. Below the conversation details, there is an automated message from the City of San Rafael. At the bottom, there are buttons for "Respond" and "Add Staff Note", and a link to "Send an email to geremy.cohen@gmail.com" with a "Change contact method" option.

2. Choose the appropriate team that should own the conversation and, if known, you may also choose the appropriate staff member, or you may leave it blank. Then click save.

The screenshot shows a "Change Team/Assignee" dialog box. It contains the following elements:

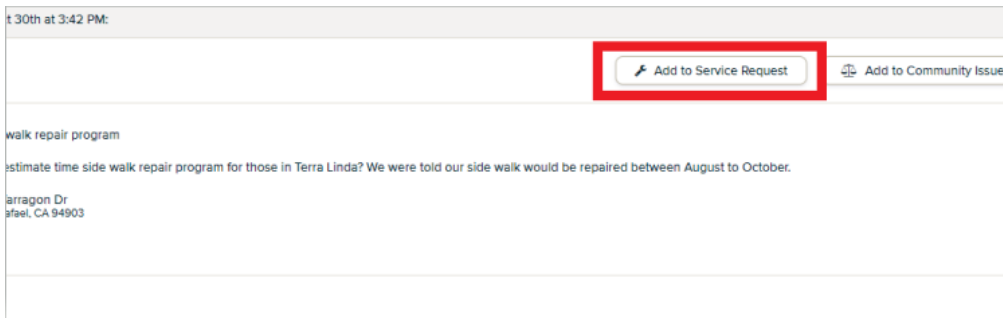
- A title bar: "Change Team/Assignee" with a close button (X).
- A question: "Which team owns this conversation?"
- A dropdown menu: "Department of Public Works" with a red arrow pointing to it.
- A question: "Who is assigned to this conversation?"
- A dropdown menu: "Select user..." with a red arrow pointing to it.
- A search bar: "Start typing to search..." with a magnifying glass icon and a red arrow pointing to it.
- Two buttons: "Cancel" and "Save" with a red arrow pointing to the "Save" button.

CREATING SERVICE REQUESTS:

EXTERNALLY (FROM A RESIDENT WRITING IN):

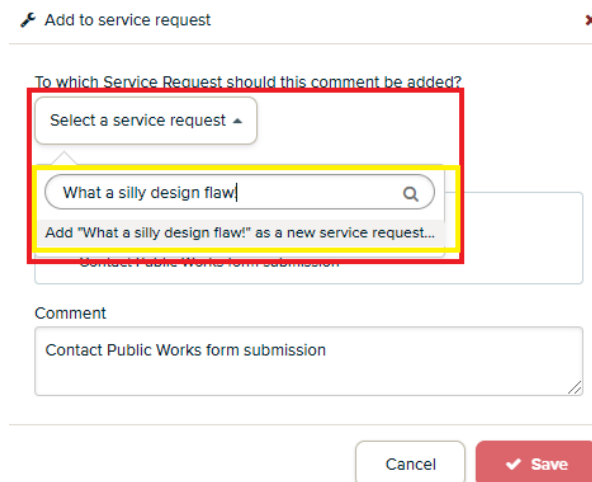
Below is a service request table to guide you in knowing who to assign service requests to. There are 6 division tags: Streets, Parks, Traffic, Garage, Facilities, and DPW non-division.

1. To create a new service request click the "add to service request" button.



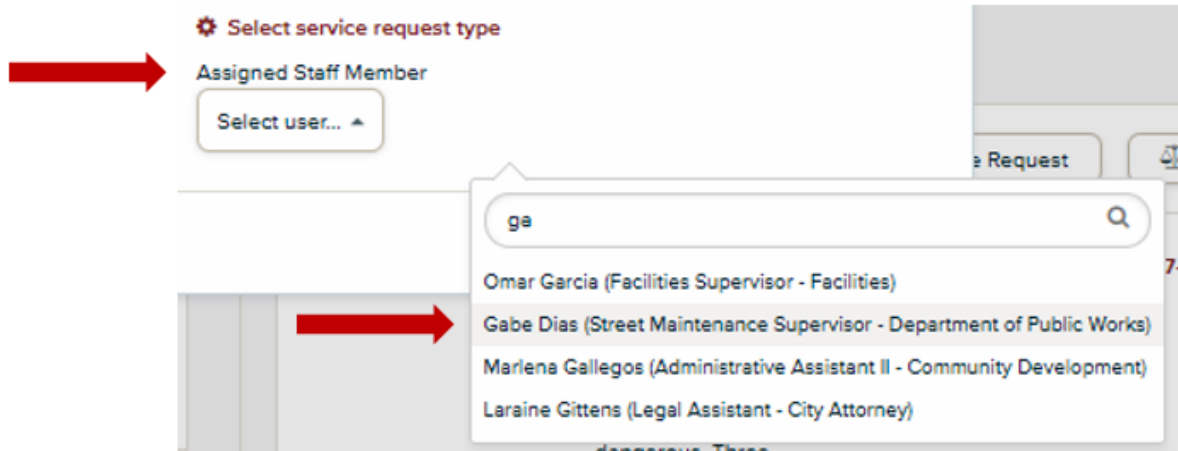
A screenshot of a web interface showing a service request form. At the top right, there are two buttons: "Add to Service Request" and "Add to Community Issue". The "Add to Service Request" button is highlighted with a red rectangular box. Below the buttons, there is a text area containing the following text: "walk repair program", "estimate time side walk repair program for those in Terra Linda? We were told our side walk would be repaired between August to October.", "arragon Dr", and "Alhambra, CA 94903".

2. Title the service request in the following format: **address/location of service request – followed by service needed** (i.e. 111 Morpheus St – graffiti on building door).
3. If you do not wish to tie the current communication to an existing service request and you simply wish to create a new request, start typing the new title, you'll see an option for "add 'blah blah blah' as a new service request", select this option. Note: If you do not see this option it may be because there are many service requests with the same title. Simply scroll down to the end of the list and you will see "Add '.....' as a new service request."

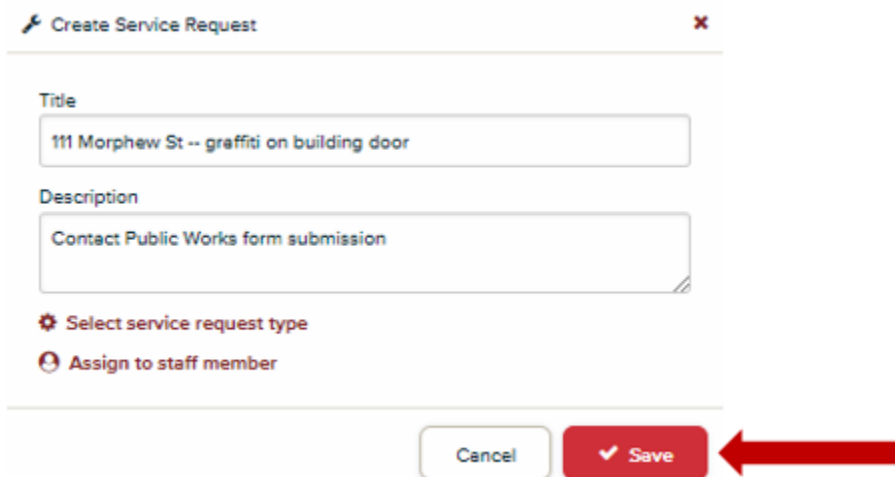


A screenshot of a dropdown menu titled "Add to service request" with a close button (X) in the top right corner. The dropdown menu is open, showing the question "To which Service Request should this comment be added?". Below this question is a search box with the placeholder text "Select a service request". The search box contains the text "What a silly design flaw" and a search icon. Below the search box, there is a list of suggestions. The first suggestion is "Add 'What a silly design flaw!' as a new service request...", which is highlighted with a yellow rectangular box. Below the suggestions is a text area with the text "Contact Public Works form submission". At the bottom of the form, there are two buttons: "Cancel" and "Save".

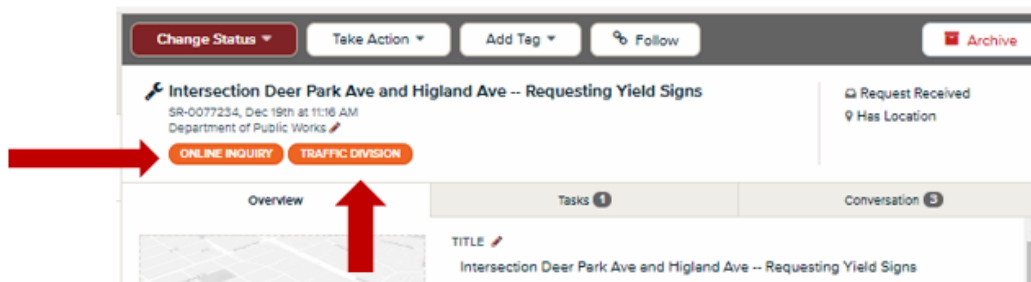
- Assign to staff member – use [Service Request Guide](#) for guidance



- Click "save" to submit service request



- After service request has been submitted add appropriate division tag to service request. Division tags are used to generate monthly reports for DPW.



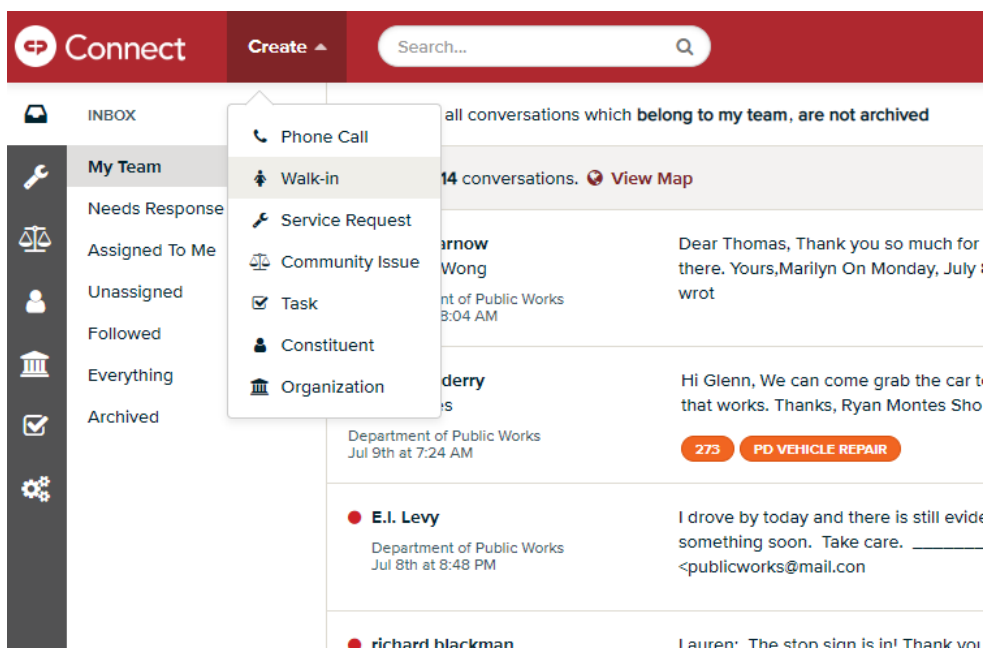
- Once the service request has been created you and the assigned staff member will automatically be named followers. To add additional followers, click the “+Add Follower” icon located on the lower left side of the service request.



Note: Add Mark Wright as a follower to all Parks and Streets service requests

INTERNALLY (FROM AN EMAIL OR PHONE CALL)

- Click on the “Create” tab, and then on the drop-down menu, click on “Service Request”.



2. A box will pop up. Under “Requestor”, type in their name or phone number (phone number is usually easier). If they have written a request before, their contact information will come up. Click on it. If they have not, add them by typing in their name, scrolling to the bottom of the drop-down menu, and clicking on “Add ___ as a new constituent”. Another form will pop-up; fill it out accordingly. If they are adamant on remaining anonymous, type in “Anonymous Constituent”.

3. Title the service request in the following format: **address of service request – followed by service needed** (i.e. 111 Morphew St – graffiti on building door). Type in any additional or detailed information in the “Description” box.

4. Assign to staff member by clicking on the “Select user” drop-down menu – use [Service Request Guide](#) for guidance.

5. Click "Save" to submit service request.

Create Service Request

Title
111 Morphew St -- graffiti on building door

Description
Contact Public Works form submission

Select service request type

Assign to staff member

Cancel Save

6. After service request has been submitted, you will be taken to this screen. Add appropriate division tag to service request. Division tags are used to generate monthly reports for DPW. Add any additional tags describing the service request (e.g. stop sign request, pothole, vegetation, etc.)

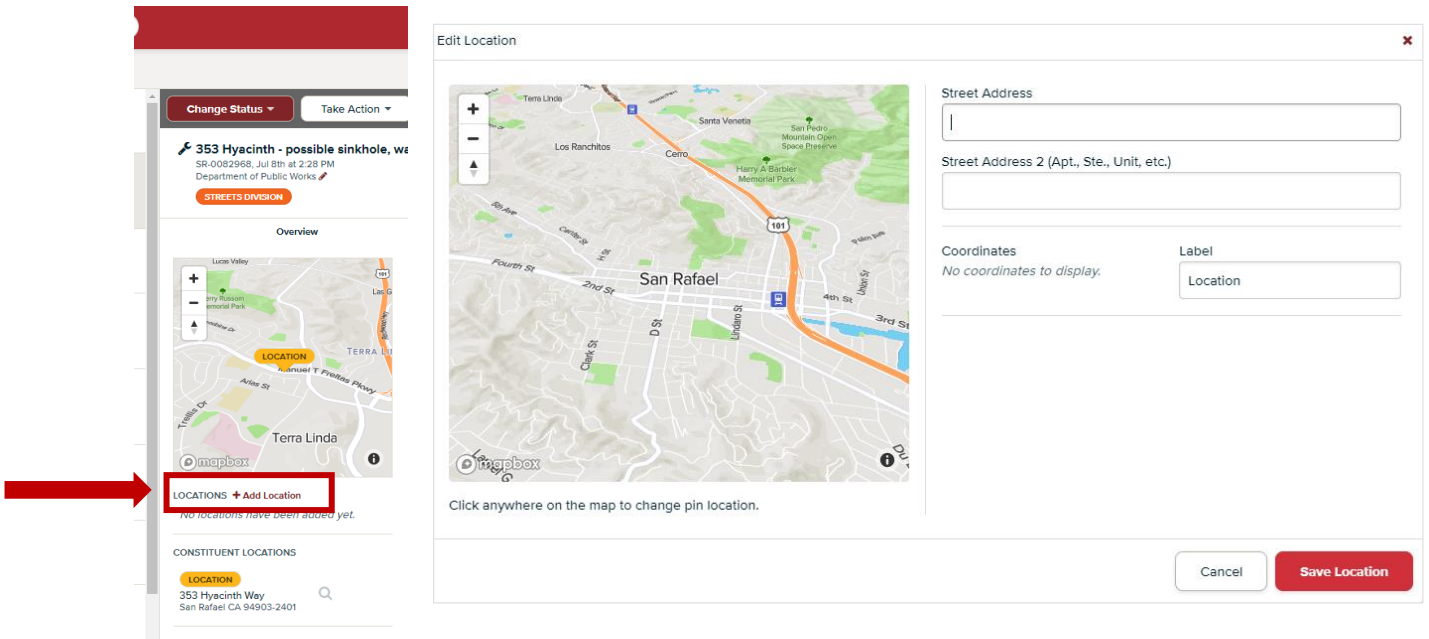
Connect Create Search... Quick Reference Recently Viewed Iman Kayani

SERVICE REQUESTS We found 399 service requests.

My Team

- Assigned To Me
 - PD Vehicle 273-20190709-Needs Service SR-0082981, Jul 9th at 7:19 AM Department of Public Works
 - 353 Hyacinth - possible sinkhole, wants DPW to take a look** SR-0082968, Jul 8th at 2:28 PM Department of Public Works
 - Pothole on Professional Center Parkway SR-0082966, Jul 8th at 2:10 PM Department of Public Works
 - Coleman and Fair Dr Intersection - Vegetation Removal SR-0082949, Jul 8th at 11:40 AM Department of Public Works
 - Non-PD Vehicle 8203 20190708 - Deed Battery SR-0082926, Jul 8th at 8:26 AM Department of Public Works
 - Lincoln and Hammondale - Traffic Signal Timing SR-0082924, Jul 8th at 8:22 AM Department of Public Works
 - Maria B Freitas old boat park - Vegetation SR-0082923, Jul 8th at 8:19 AM Department of Public Works
 - PD Vehicle 232-20190708-LHeadlight, Turn Sig. TPS Fault SR-0082914, Jul 8th at 6:18 AM Department of Public Works
 - PD Vehicle 236-20190708-Trans Issue SR-0082913, Jul 8th at 6:16 AM Department of Public Works
- Unassigned
- Followed
- Everything
- Archived

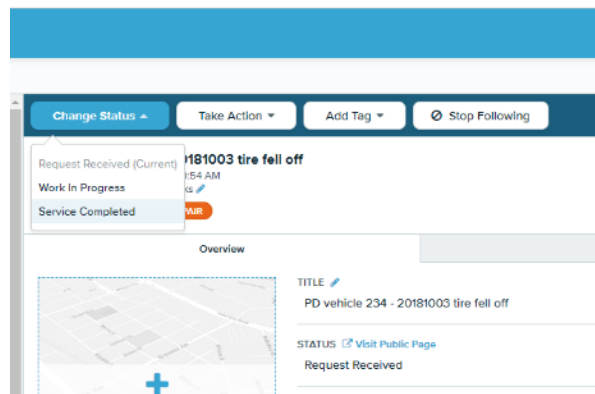
- To enter a location, click on “Add Location”. A screen will pop up and you can type in the address. Alternatively, you can click on the Map to select a location from there (this is helpful when referencing intersections).



- Once the service request has been created you and the assigned staff member will automatically be named followers. To add additional followers, click the “+Add Follower” icon located on the lower left side of the service request.
 - Add Mark Wright as a follower to all Parks and Streets service requests

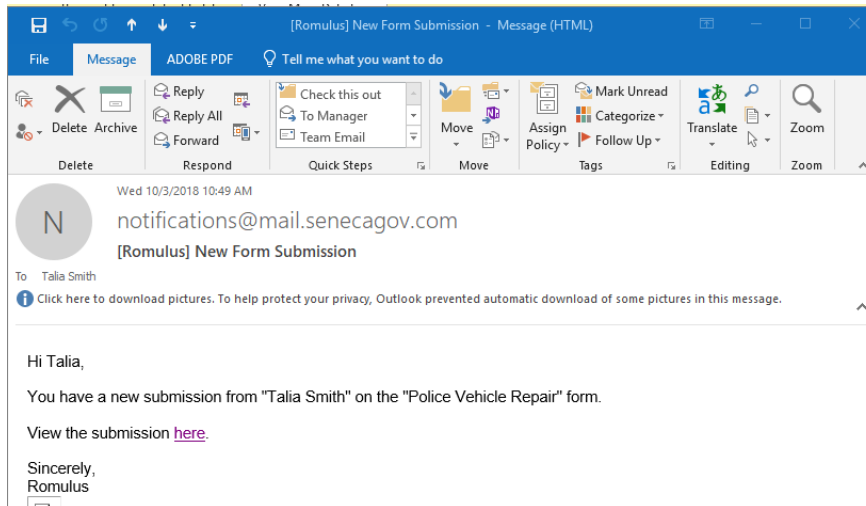
CHANGING SERVICE REQUEST STATUS:

- If you have received a service request, you must “change status” of the request:
 - Request Received** – indicates that the service request was created.
 - Work in Progress** – currently working on service request and add notes in the “staff notes” section if the request may take longer than one month.
 - Service Completed** – service request has been completed and no follow-up is needed.
 - If this option is chosen you may now archive the case.

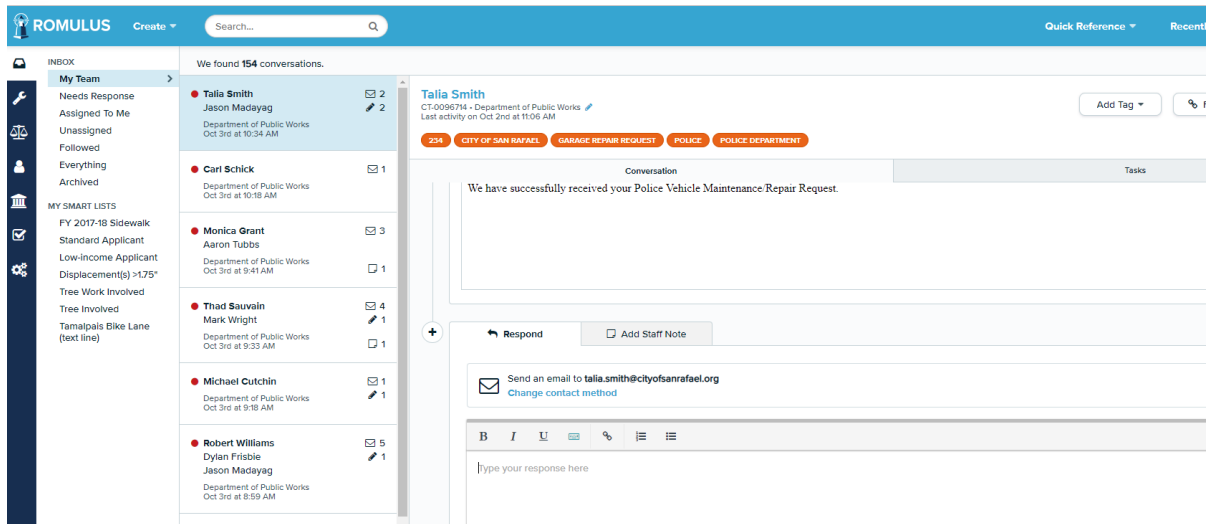


USING ROMULUS (CP CONNECT) FOR POLICE VEHICLES:

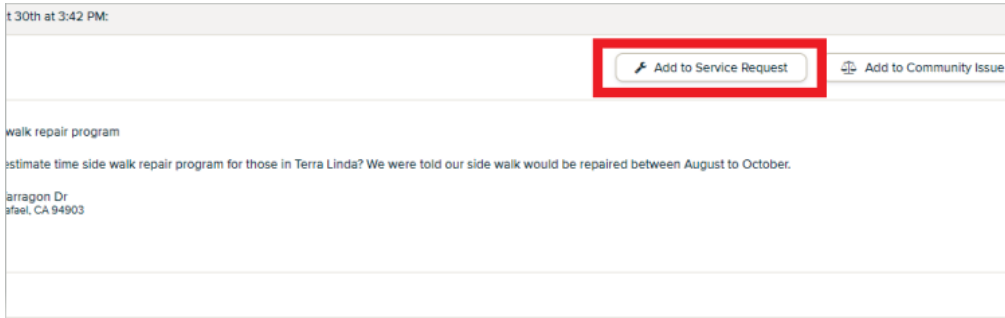
1. Check your email inbox for any new emails “You have a new submission from “NAME” on the “Police Vehicle Repair...””



2. Click on the link under “View the submission here”
3. A window will pop open on the internet that looks like this. You are now viewing the form submission. The conversation will automatically jump to the very bottom of the conversation string.



6. To create a new service request click the "add to service request" button.



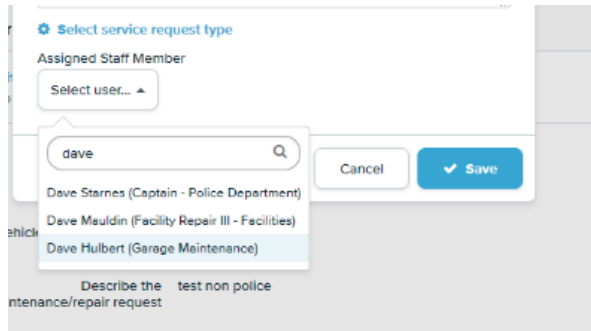
4. Title the service request in the following format: "PD vehicle VEHICLE # - YEAR MONTH DAY - short description". For example, here I did: "PD vehicle 223 - 20181003 – broken side mirror".

A screenshot of a "Create Service Request" form. The form has a title field containing "PD vehicle 223 - 20181003 - broken side mirror" and a description field containing "Police Vehicle Repair form submission". Below the description field, there are two links: "Select service request type" and "Assign to staff member".

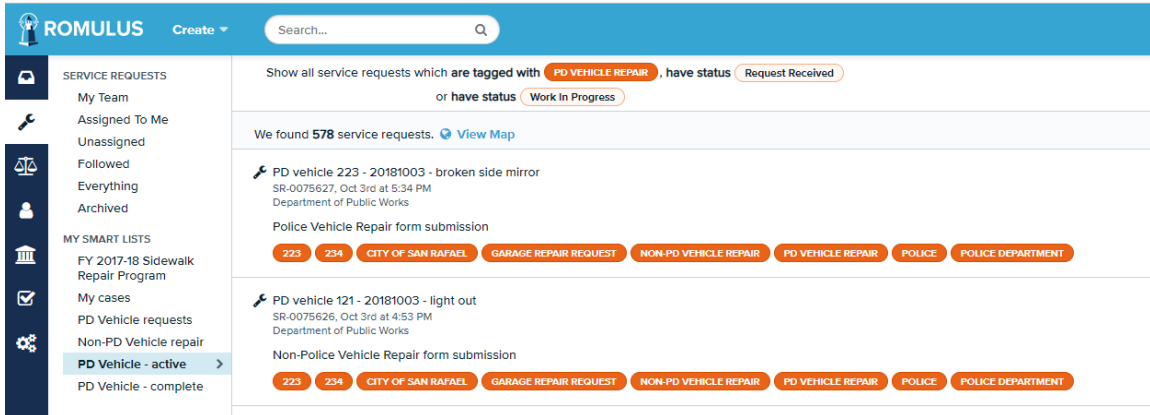
7. If you do not wish to tie the current communication to an existing service request and you simply wish to create a new request, start typing the new title, you'll see an option for "add 'blah blah blah' as a new service request", select this option. Note: If you do not see this option it may be because there are many service requests with the same title. Simply scroll down to the end of the list and you will see "Add '.....' as a new service request."

A screenshot of an "Add to service request" dialog box. The dialog box has a title "Add to service request" and a close button. Below the title, there is a question: "To which Service Request should this comment be added?". Below this question is a dropdown menu with the text "Select a service request". Below the dropdown menu is a search input field containing "What a silly design flaw" and a search icon. Below the search input field is a list item: "Add 'What a silly design flaw:' as a new service request...". Below the list item is a text area containing "Contact Public Works form submission". At the bottom of the dialog box, there are two buttons: "Cancel" and "Save".

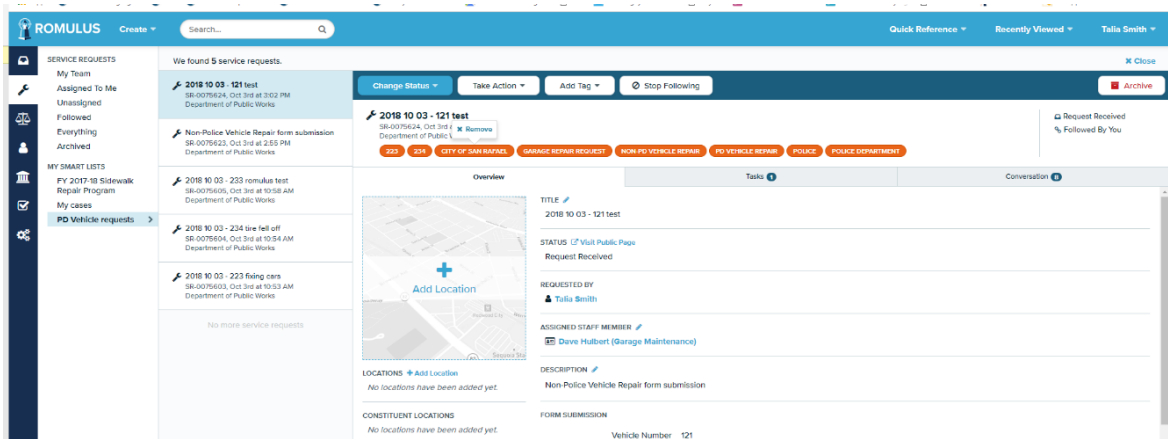
8. Click "Assign to staff member". Click Assigned Staff Member → Select user → type "Garage Supervisor". Hit the blue save button when done.



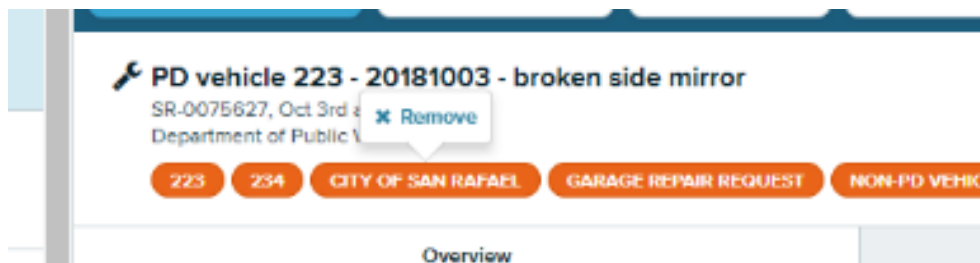
- A new window will pop up. Click on the wrench icon on the left menu. Under “My SMART Lists” click on the “PD Vehicle – active” list (or “Non-PD Vehicle - active” list if it was a Non-PD car). The window will look like window below, and the service request you just made will be at the top:



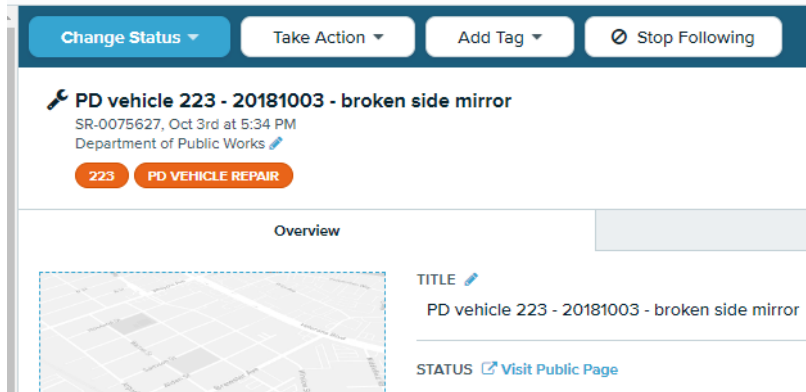
Click on the service request you just made, and the window will look like this:



- All the orange ovals on the top are “tags”. If someone submitted the form who has submitted multiple forms in the past, you’ll have to do a little clean up and delete old “tags” that don’t apply to this service request. Delete tags by hovering your mouse over them until a “Remove” button pops up. Delete every tag except the vehicle number of the current service request (should be in the name of the service request) and the tag “PD vehicle repair” (or if it’s not a PD vehicle leave the “Non-PD vehicle repair” tag and the Department name tag)

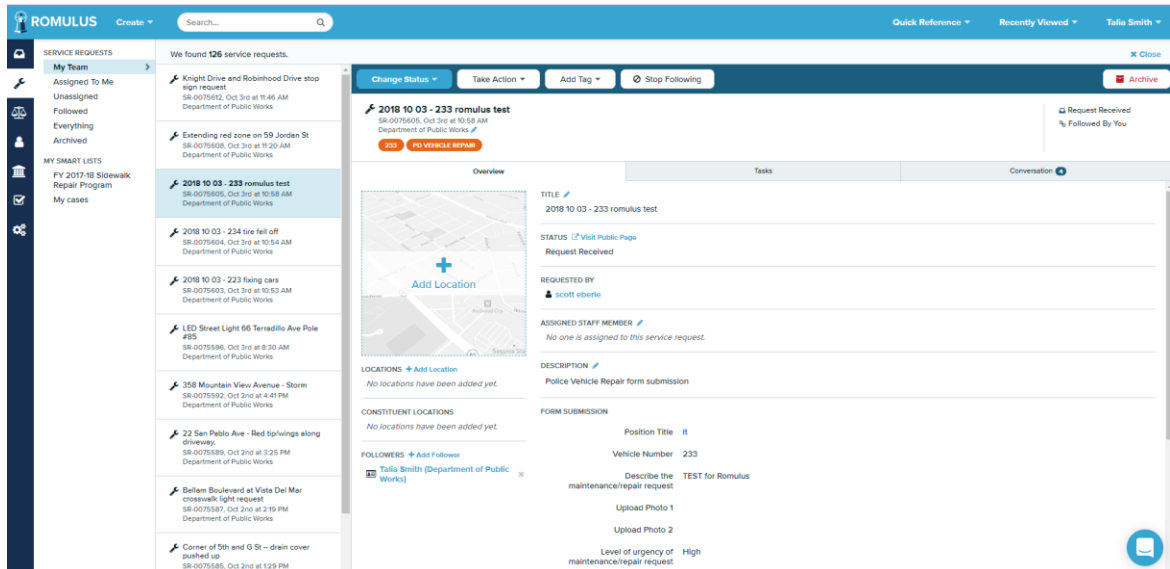


- Here is what it should look like when you're done. There should only be two tags left after you deleted all the other ones:

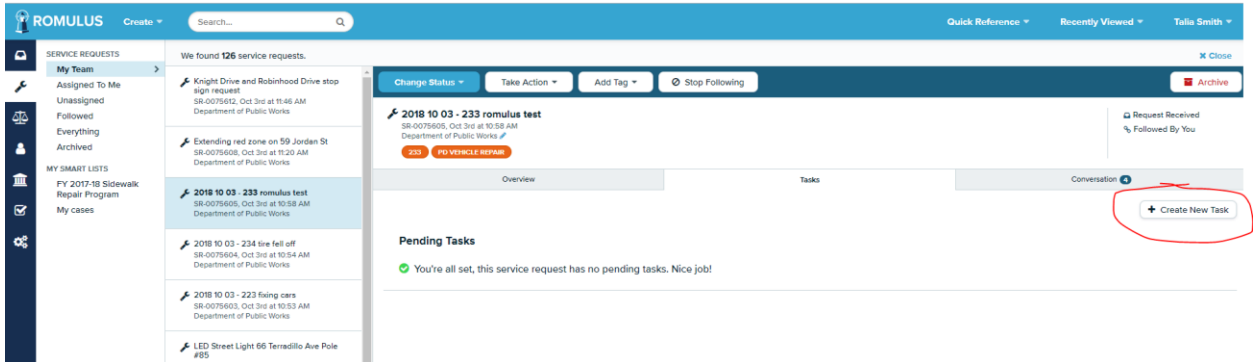


- Your service request is all set up. There are three tabs: **Overview**, **Tasks** and **Conversation**.

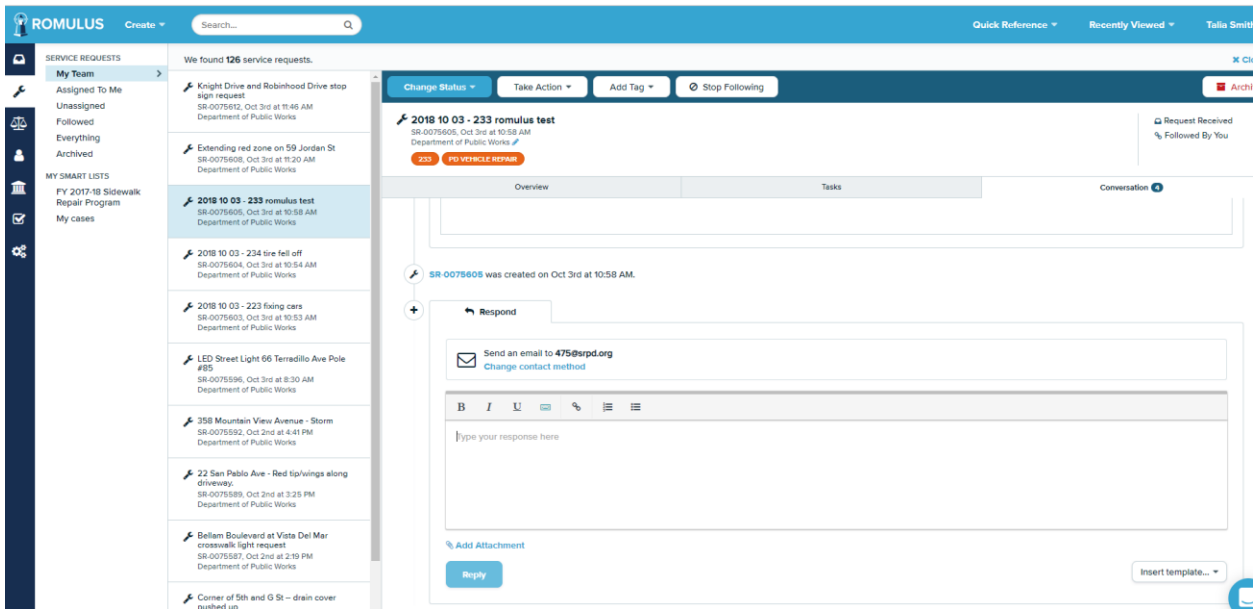
Overview: view original form submission. Photos will be here if the person uploaded them



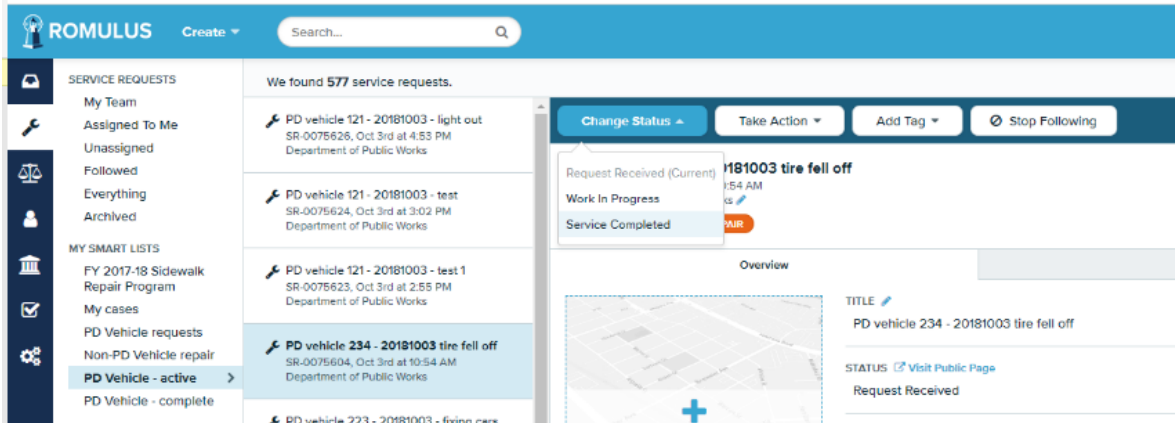
Task: Create any checklist tasks associated with the specific service request. Click “+ Create New Task in the upper right”



Conversation: Communicate with the person who submitted the form here. For example, if you want to write to the person and let them know when you plan on working on the vehicle, or if they write you back with more detail. Note: **all** previous form submissions ever submitted by this person will be in the conversation string here. But you probably will only care about what is at the very bottom of the string.

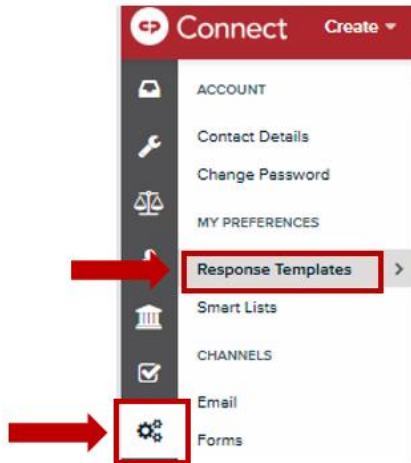


9. When the time comes where the service request is complete, open up Romulus: <https://romulus.senecagov.com/app/>. Click on the wrench in the left menu, then under “My Smart Lists” click on “PD Vehicle – active”. Find the service request and click on it. You might want to first use the conversations tab to send an email to the person who submitted it letting them know it’s ready to be picked up, etc. Then click on the blue button on the top “Change Status” and select “Service Completed”.

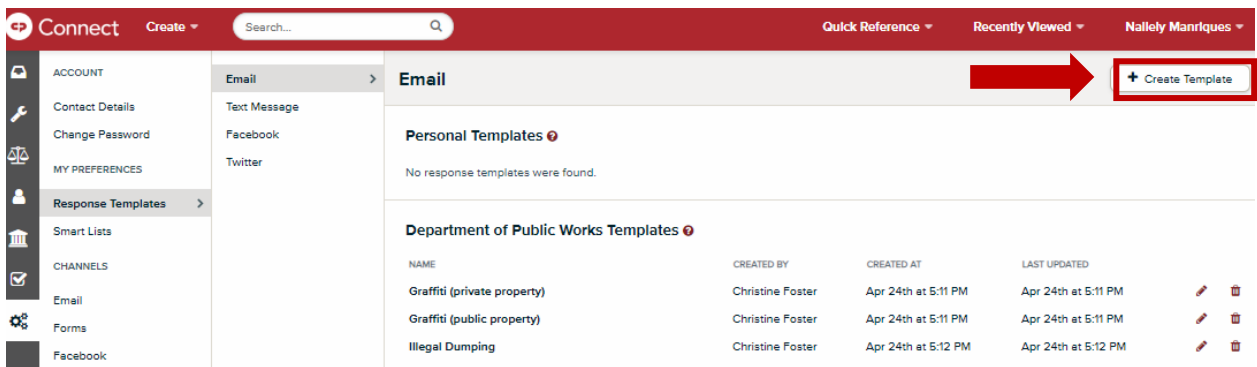


CREATING A TEMPLATE:

1. Go to settings
2. Click "Response Templates"



3. Click "Create Template" at upper right-hand corner of screen



4. Title the template

A screenshot of the 'Create New Response Template' dialog box. The dialog has a title bar with a close button. It contains a 'Name' input field with a red arrow pointing to it. Below the name field is a 'Body' text area with a rich text editor toolbar (bold, italic, underline, link, unlink, list, list) and the placeholder text 'Type your response here'. At the bottom, there are radio buttons for 'Who is this template for?' with options 'Only me' (selected) and 'Only Department of Public Works'. At the very bottom are 'Cancel' and 'Create Template' buttons.

5. Insert the body of the message in the box
6. Click “Only Department of Public Works” at the bottom of the body section to share with DPW Romulus Team or “Only me” if a personal template.
7. Click “Create Template” to save.
8. The template should appear in the Department of Public Works Templates list. Use the pencil to edit the template should you need to make changes.

Personal Templates

No response templates were found.

Department of Public Works Templates

NAME	CREATED BY	CREATED AT	LAST UPDATED		
Graffiti (private property)	Christine Foster	Apr 24th at 5:11 PM	Apr 24th at 5:11 PM		
Graffiti (public property)	Christine Foster	Apr 24th at 5:11 PM	Apr 24th at 5:11 PM		
Illegal Dumping	Christine Foster	Apr 24th at 5:12 PM	Apr 24th at 5:12 PM		
Tree Trimming/Pruning	Christine Foster	Apr 24th at 5:12 PM	May 11th at 1:35 PM		
Tree Planting Request	Christine Foster	Apr 24th at 5:13 PM	Apr 24th at 5:13 PM		