CP Connect Assigned Service Request Guide

This guide is intended for DPW staff that are assigned service request within CP Connect.

Checking Service Request

Click here to view all **open** service request assigned to you

DEPARTMENT OF PUBLIC WORKS

1 Change Status ▾ **2** Take Action ▾ **3** Add Tag ▾ Follow **4** 📁 Archive

🔧 **January 2019 Storm - Issues (1)**
SR-0089063, Dec 9th at 7:55 AM , Last Comment Added: Dec 9th at 7:55 AM
Department of Public Works ✏
5 STREETS DIVISION

🔔 Request Received

Overview	Tasks ①	Conversations ① **6**

7 TITLE ✏
January 2019 Storm - Issues

Add Location

STATUS ⧉ Visit Public Page
Request Received

8 REQUESTED BY
👤 Parisa Najimi

9 ASSIGNED STAFF MEMBER ✏
🪪 Mark Wright (Department of Public Works)

12 LOCATIONS ✚ Add Location
No locations have been added yet.

10 DESCRIPTION ✏
Contact Public Works form submission

CONSTITUENT LOCATIONS
No locations have been added yet.

11 FORM SUBMISSION

Subject	January 2019 Storm and other issues
Message	Hello, Attached is a report to inform you the existing information of the unit, when i was renting there. hopefully it is going to be safe for new tenants with your supervision.
Location	.
Attachment	

13 FOLLOWERS ✚ Add Follower
🪪 Mark Wright (Department of Public Works) ✕
🪪 Jason Madayag (Department of Public Works) ✕

14 ATTACHMENTS ⬆ Upload

📄 PDF
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15 STAFF NOTES ✚ Add Note

Jason Madayag added a note on Dec 9th at 7:56 AM

I am not entirely sure if this is our departments responsibility or if it should go to another department.
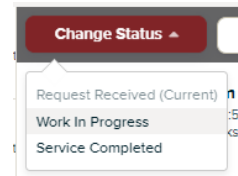
✏ Edit 🗑 Delete

16 HISTORY

Dec 9th at 7:56 AM | Jason Madayag commented on **SR-0089063**
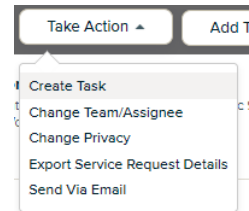
💬 Help

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1. **Change Status:** Allows you to change the status to let others who view the case know that you've either started the case or completed it.


2. **Take Action:**
   a. Create Task: If there are multiple users involved or steps to compete the request. This can help other users see the progress.
   b. Change Team/Assignee: Use this to assign the case to someone else, including those in another apartment. For example: You are assigned an illegal dumping case but it is on private property, you would go to this button and reassign the case to Code Enforcement.
   c. Change Privacy: Do not use.
   d. Export Service Request Details: Allows you to export/print all the details of the case.
   e. Send Via Email: Do not use.

3. **Add Tag:** Tags help organize and track cases that are similar. Most service request should already be tagged when you receive it. Cases should at a minimum always be tagged with the division in which the case is assigned to. Try to use a tag that has already been created, start typing and you will see similar tags. Tags are displayed in orange and can be selected which will generate a list of all service request featuring that tag.
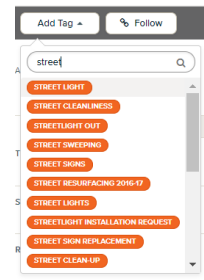
4. **Archive:** Select this button ONLY after you have completed the case. This will basically close the case and Admin will no longer be able to send you reminders about the case. If a constituent emails you after the case is archived it will automatically be unarchived so you may archive cases once you are completed.
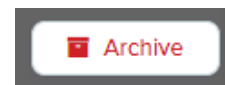
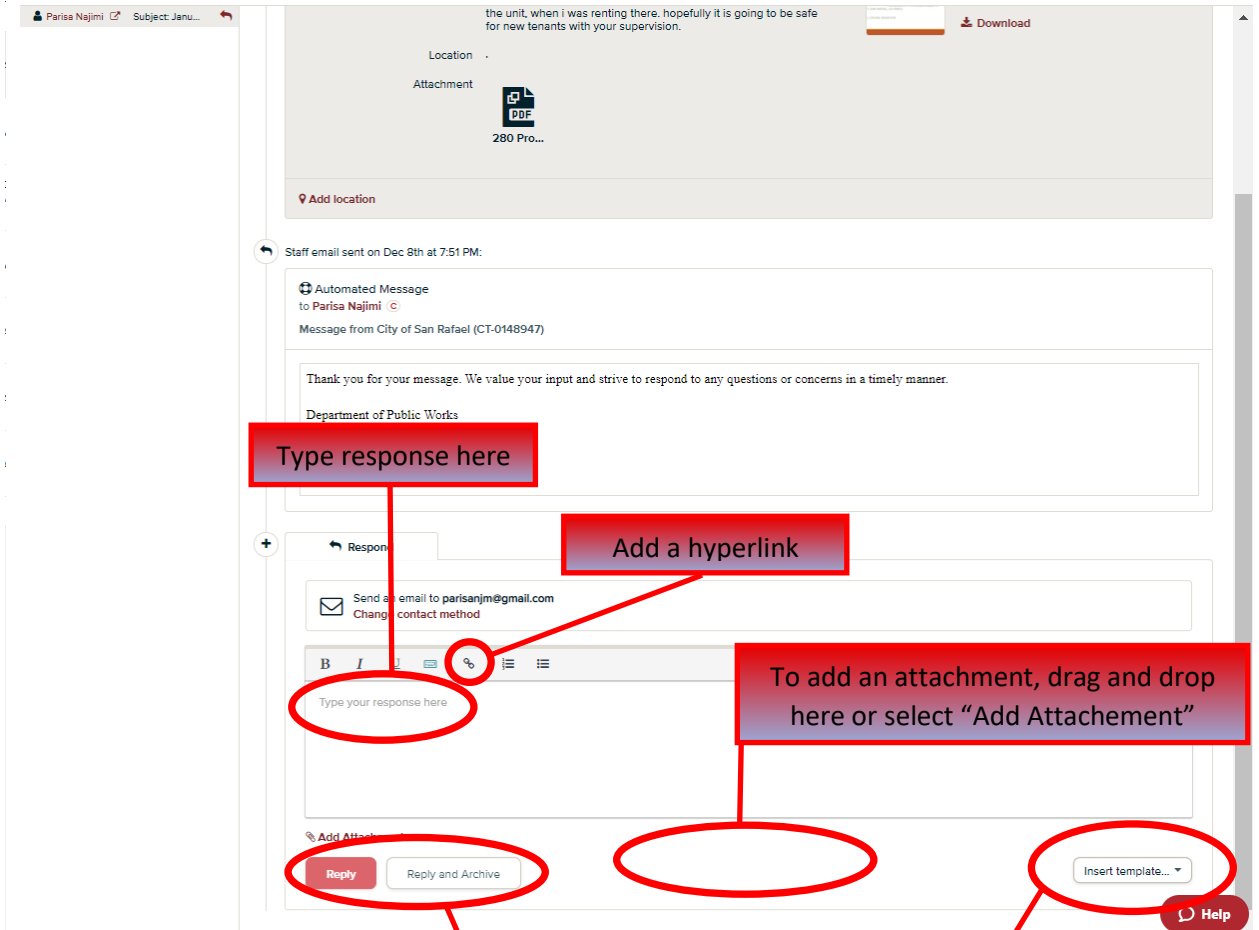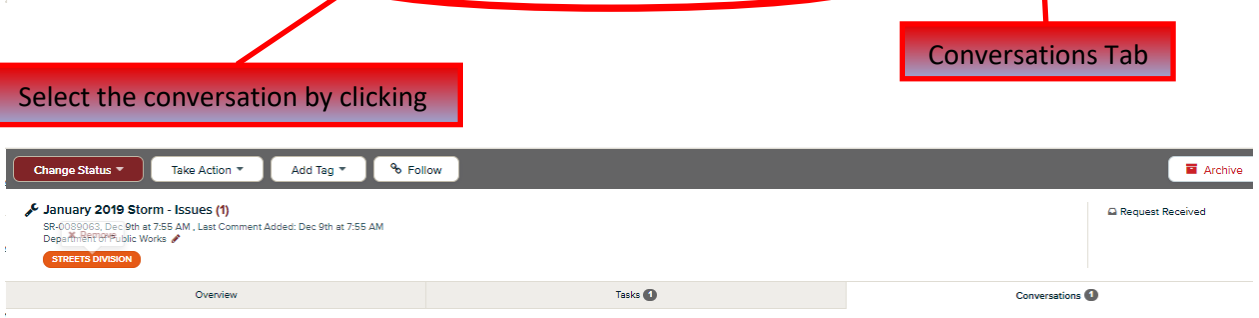5. **Case Tags:** These are the tags that are currently being used.

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6. <u>**Conversations:**</u> This is where you email with the resident and you can view past replies.

Conversations Tab

Select the conversation by clicking

Type response here

Add a hyperlink

To add an attachment, drag and drop here or select "Add Attachement"

Use respone templates
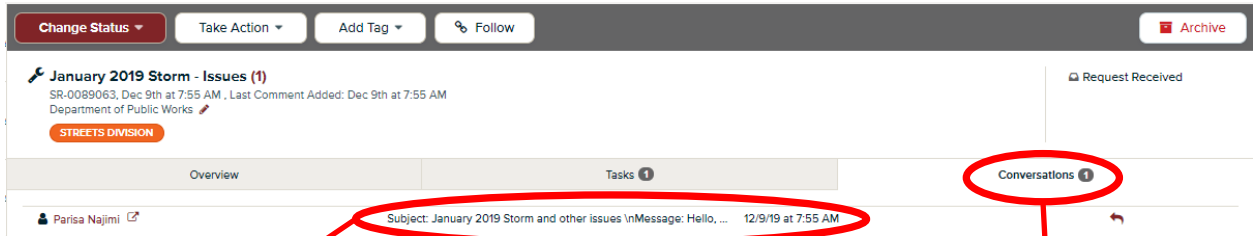
Use "Reply" if you need a response and "Reply and Archive" if you are completed with the case

7. **Title:** To change the title select the little pencil button.

TITLE

January 2019 Storm - Issues

8. **Requested By:** This is the constituent who requested the service. Select the name to see and/or edit their contact information as well as any other service request they may have submitted in the past.

REQUESTED BY
👤 Parisa Najimi
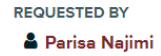
9. **Assigned Staff Member:** This is the staff member responsible for the service request. If that is incorrect, select pencil to change it.
This is important as only cases where your name appears here will show up in your "Assigned To Me" view.

ASSIGNED STAFF MEMBER ✏
Mark Wright (Department of Public Works)
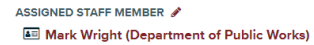
10. **Description:** This is typically auto filled and you do not need to use this section.

DESCRIPTION ✏
Contact Public Works form submission

11. **Form Submission:** This is what the constituent wrote in originally on the online form.

12. **Locations:** This is where the service is required. If the location is unknown leave blank. If know add here. Do not put the constituents mail/home address here unless that is also the location of the service required.

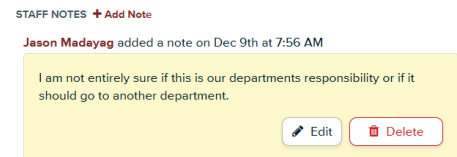LOCATIONS ➕ Add Location
No locations have been added yet.
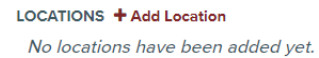
13. **Followers:** These are people that may be involved with the case. All follower will be sent notifications when certain actions take place. Followers may be added and removed here by selecting the "x" next to their name to remove or by adding with the "+ Add f\Follower" button.

FOLLOWERS ➕ Add Follower
Mark Wright (Department of Public Works) ✕
Jason Madayag (Department of Public Works) ✕

14. **Attachments:** All attachments appear here and can be downloaded. You may also upload attachments in this section.

ATTACHMENTS ⬆ Upload
📄 PDF
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15. **Staff Notes:** These notes are only seen internally. Add notes here whenever you take an action or contact the constituent outside of the conversations tab. This ensures that there is a record of your action. Select, "+ Add Note" to record a note to the case.

STAFF NOTES ➕ Add Note
Jason Madayag added a note on Dec 9th at 7:56 AM
I am not entirely sure if this is our departments responsibility or if it should go to another department.
✏ Edit   🗑 Delete

16. **History:** View the case history here to see when it was created and who it was assigned to.

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Suggested Work Flow:

1. Check service request assigned to you daily. The newest case will appear at the top.
2. Ensure that you are the best person to handle the case, if so proceed, if not reassign the case.
3. Check the tags, title, location to ensure they are accurate.
4. Respond to constituent in the conversations tab.
5. If you took an action or did anything that was noteworthy, document it in the staff notes section.
6. Change the status and archive the case if you are completed. If you are not, keep it open until you are complete.