BEGINNERS CP CONNECT GUIDE

TABLE OF CONTENTS

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

ANSWERING AN INQUIRY FROM SERVICE REQUEST:

1. Click on wrench in top left corner, then click on "Assigned To Me"
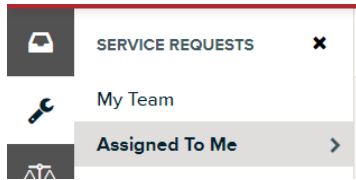
2. Select the service request and go to the conversation tab.

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

4. An inquiry requires action from DPW, create a service request (for instructions on how to create a service request see "Service Request").
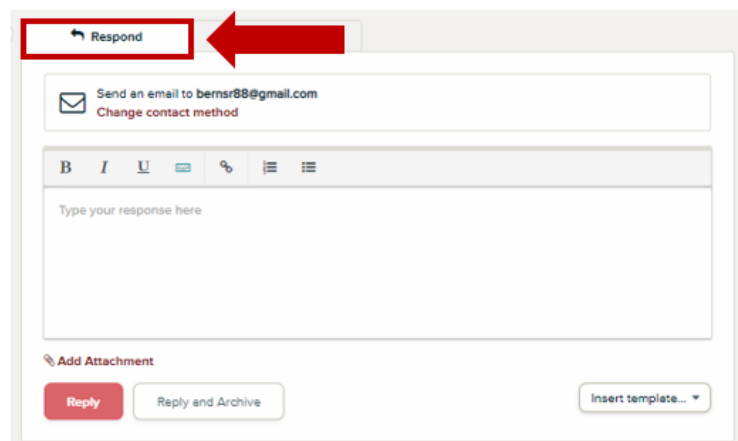
5. To insert an automated response, hit the "Insert template" drop-down menu at the lower right corner of the respond message. Select the desired template from the list to insert in the response box. Hit reply to send message.
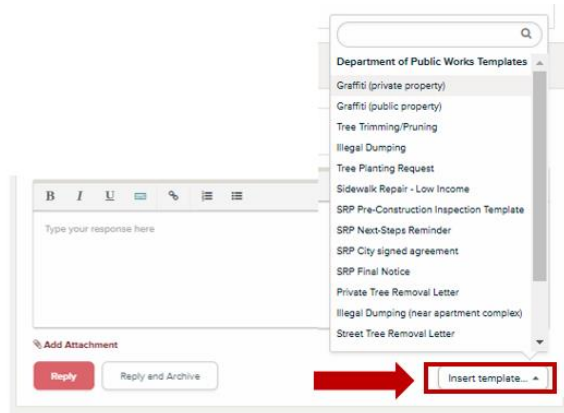
ADDING NOTE TO CONVERSATION:

- Notes are added to service request or inquiry messages to update others on CP Connect about the inquiry.
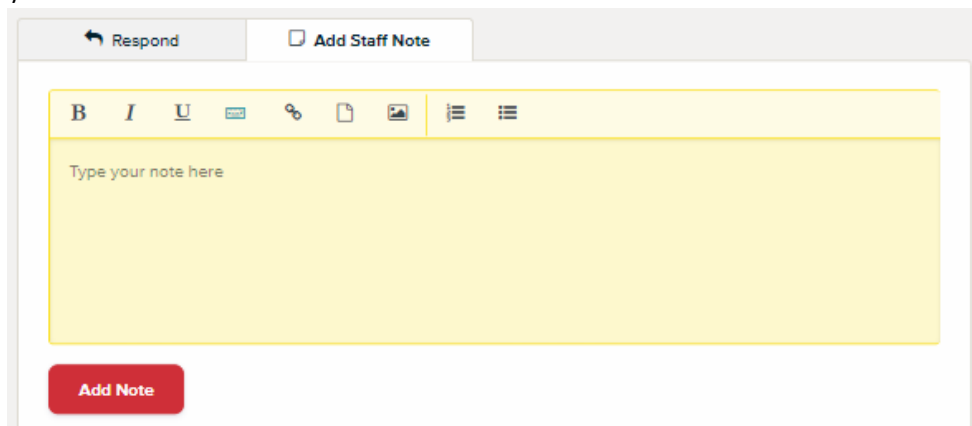
If you are in the process of researching an answer, add it in the notes to update others on the DPW Team. It's also helpful to add if you have emailed another staff member requesting a response for the resident.
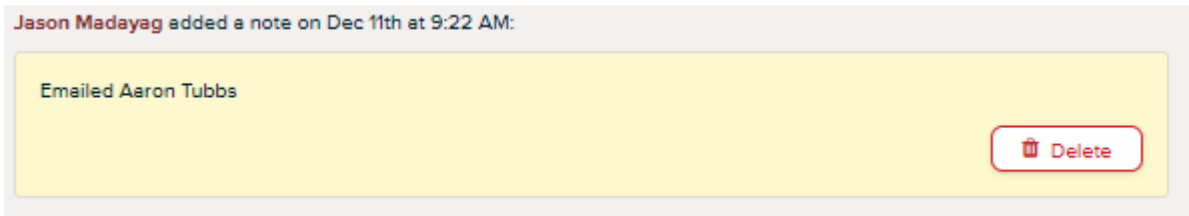
EXPORTING CONVERSATION:

1. Inquiries may be exported into a pdf if you need the conversation in a file. To export click on "Other Actions" drop down menu, select "Export Conversation," a pdf of the conversation will pop up.
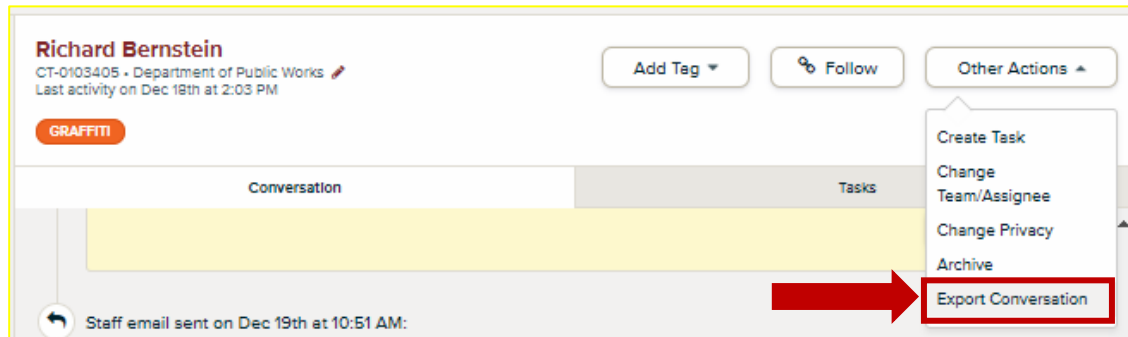
TRANSFERRING CONVERSATIONS:

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.

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.
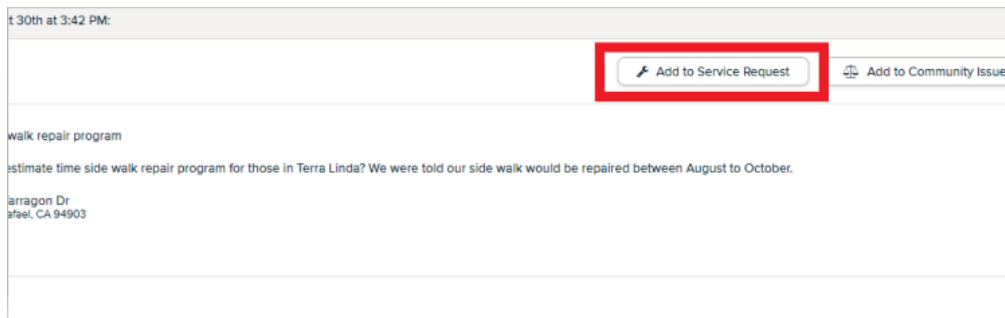
CREATING SERVICE REQUESTS:

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 7 division tags: **Admin, Engineering, Garage** , **Parks**, **Streets, Traffic**, ,and **DPW non-division**.
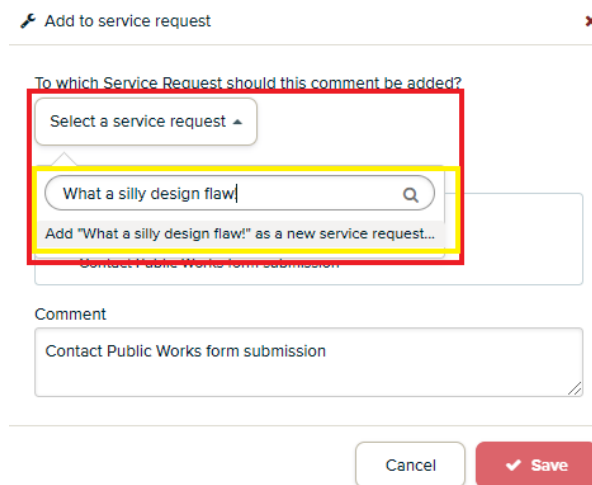
When creating a service request for the Facility Division, you will need to change the assigned team to **"Facilities."**

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

2. Title the service request in the following format: **address/location of service request – followed by service needed** (i.e. 111 Morphew 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."

4. Assign to staff member – use *Service Request Guide* for guidance
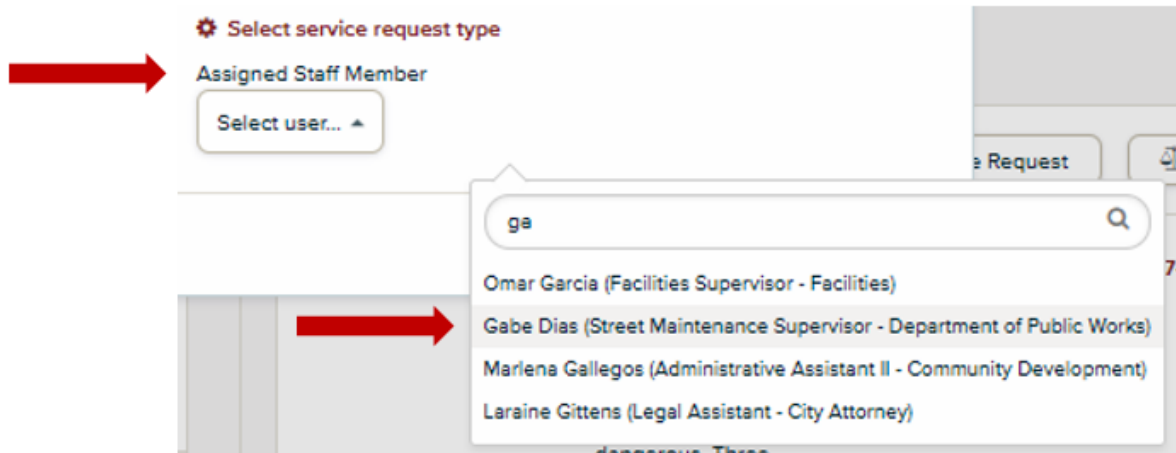
5. Click "save" to submit service request
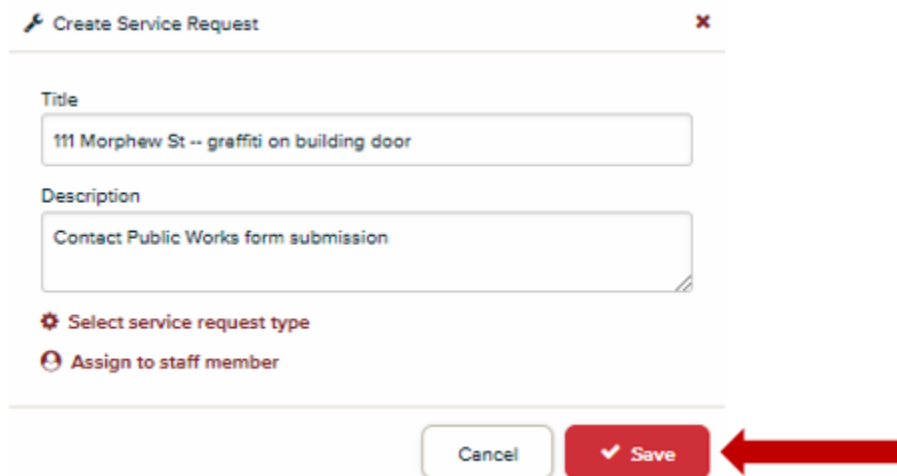
3. After service request has been submitted add appropriate division tag to service request. Division tags are used to generate monthly reports for DPW.
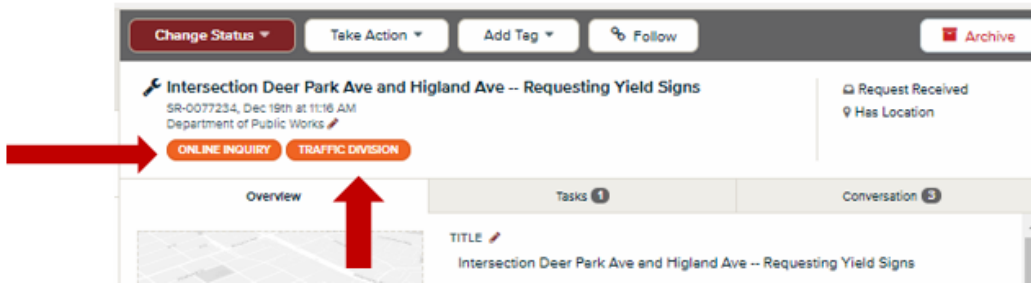
4. Once the service request has been created you and the assigned staff member will automatically be named followers. To add additional followers, click the "+Add Follower" icon located on the lower left side of the service request.

INTERNALLY (FROM AN EMAIL OR PHONE CALL)

1. Click on the "Create" tab, and then on the drop-down menu, click on "Service Request".
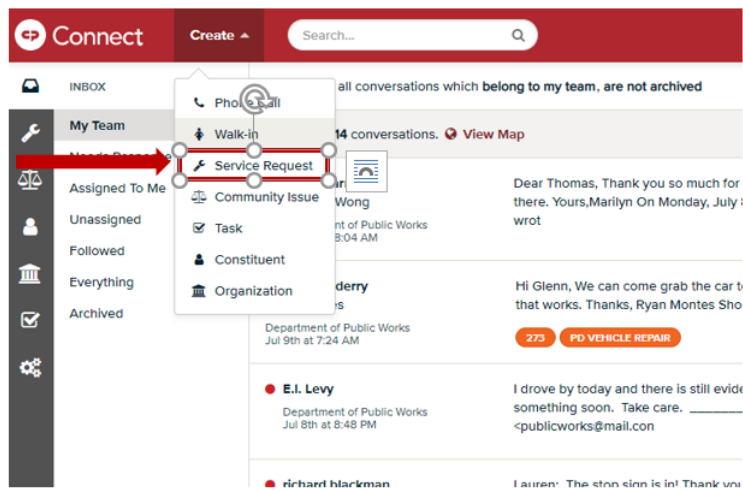
2. A box will pop up. Under "Requestor", type in their name or phone number (phone number is usually easier). If they have written a request before, their contact information will come up. Click on it. If they have not, add them by typing in their name, scrolling to the bottom of the drop-down menu, 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.

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.)

7. 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).
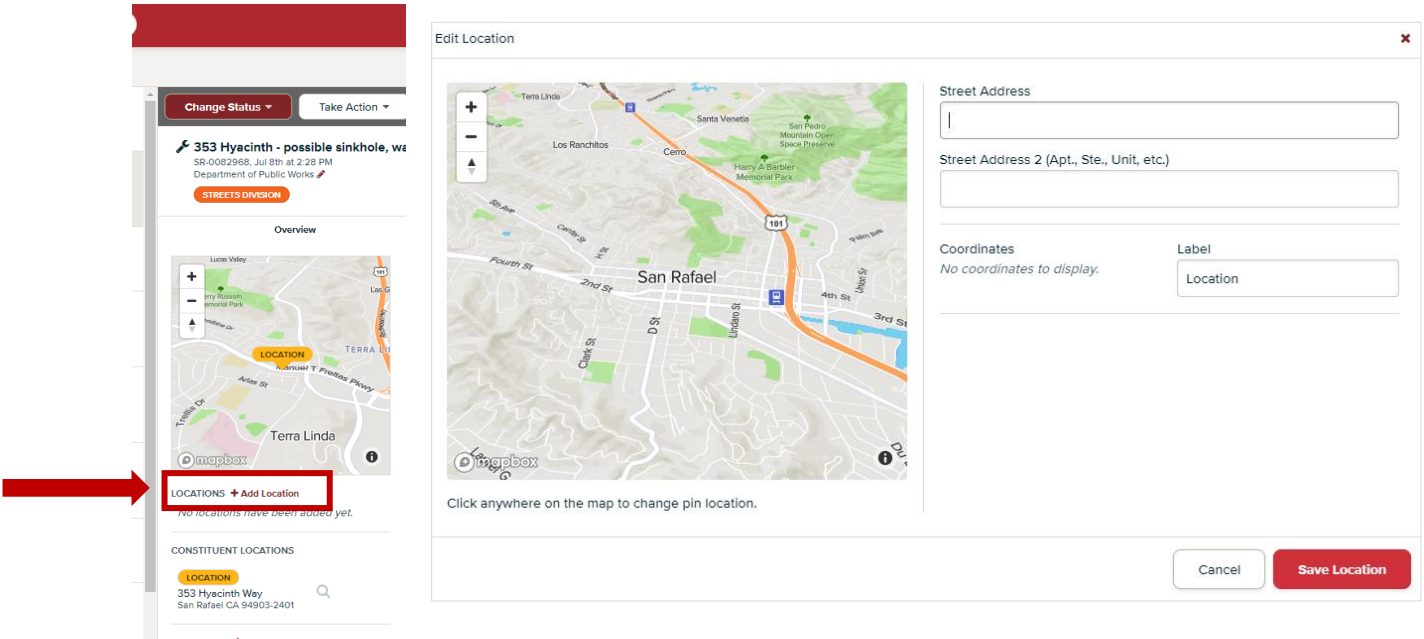

8. Once the service request has been created you and the assigned staff member will automatically be named followers. To add additional followers, click the "+Add Follower" icon located on the lower left side of the service request.

Note: This is different than adding a note to a Conversation (as shown above). Staff notes is a useful tool to inform everyone on the case. Any staff notes that are written will be sent to the assigned staff member, as well as, the followers.

1. Click add note

<div align="center">

STAFF NOTES ✚ Add Note

</div>

2. A new window will open. Type any information that you would like to share with everyone on the case.
3. Once finished click "add note"

Note: This is assists relaying information to the public when they are asking for updates on their case.

CHANGING SERVICE REQUEST STATUS:

1. If you have received a service request, you must "change status" of the request:
   a. **Request Received** – indicates that the service request was created.
   b. **Work in Progress** – currently working on service request and add "staff notes" if the request may take longer than one month or if there is any information that can be shared to the resident (and staff members) if they were to call again.
   c. **Service Completed** – service request has been completed and no follow-up is needed.
      1. **If this option is chosen you may now archive the case.**
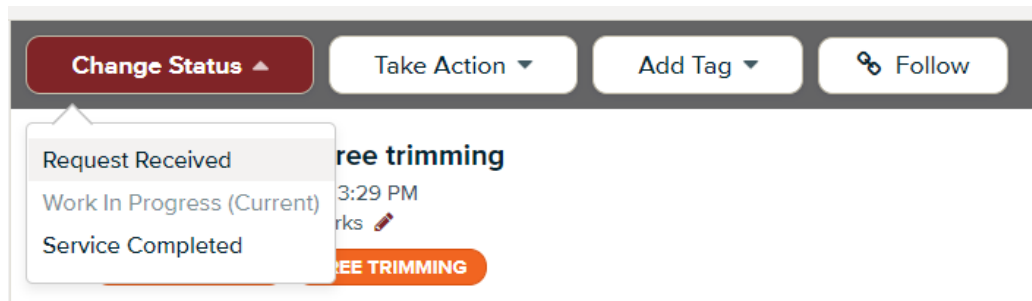
CREATING A MESSAGE TEMPLATE:

1. Go to settings
2. Click "Response Templates"
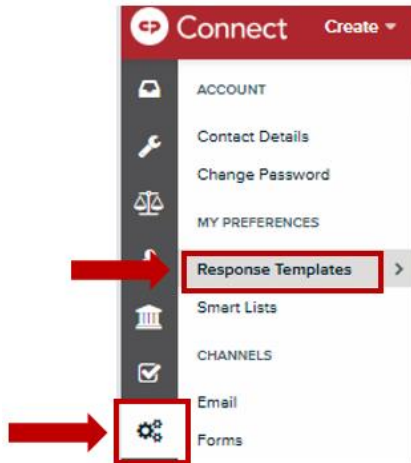
3. Click "Create Template" at upper right-hand corner of screen
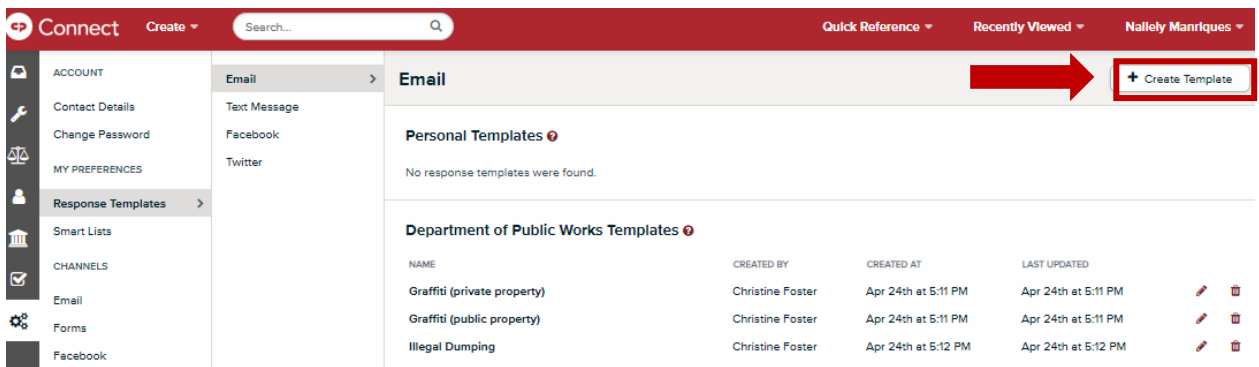
4. Title the template

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 CP Connect 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 ❷

No response templates were found.

Department of Public Works Templates ❷

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	✏	🗑

ASSIGNED STAFF	DIVISION TAG	RESPONSIBILITIES
Appropriate staff member according to inquiry request	ADMIN	- General inquiries that do not fall into any of the other categories
Jason Madayag	ENCROACHMENT PERMIT & ENGINEERING	- Encroachment Permits - Construction Inspection - Construction complaints
Jason Madayag	ENCROACHMENT PERMIT & ENGINEERING	- Construction Inspection - AEC Account Set-up
Omar Garcia	FACILITIES (change assigned team)	- Usually automated through employee website - Pest control - Facility Issues
Gerardo Paredes	GARAGE DIVISION	- Vehicle repair
Matthew Pepin	LAND DEVELOPMENT & ENGINEERING	- Land development - Grading - Water Course
Gabe Dias	STREETS DIVISION	- Street and Curb Paint and signs - Street sweeping - Graffiti - Illegal Dumping
John Shindelus	STREETS DIVISION	- Paving - Pump maintenance - Vegetation removal in certain locations - Storm drainage & emergency response
Aaron Tubs	PARKS DIVISION	- Ball fields - Islands/medians - General park questions - General questions - Safety (Aaron, Brendan)
Brendan Mitchell	PARKS DIVISION	- Pools - Trees - Parkettes

ASSIGNED STAFF	DIVISION TAG	-	RESPONSIBILITIES
Lauren Davini	TRAFFIC DIVISION	- - - -	Traffic lights Stop sign request Crosswalk/midblock request Tamalpais bike lane
Willie Lagleva	TRAFFIC DIVISION	- -	Traffic control devices (traffic lights, pedestrian signals) Streetlight Shields