SeeClickFix

Hosted CRM Training Guide for Government Clients



Welcome to the SeeClickFix Government Dashboard!

Getting Started: The Dashboard Landing Page	3 – 5
The Issues Tab	6 – 14
Overview	6
Searching for Requests	7
Anatomy of an Issue	8
Status Updates	9
Assignment	10
Bulk Actions	11
Sample Work Order	12
Change Request Type	13
The Gear Menu	14
The Map Tab	15 – 17
Geographies	16
Heat Maps	17
The Reports Tab	18 – 19
Sample Report	19

Getting Started: The Dashboard Landing Page

After logging in to your SeeClickFix account, click "Dashboard" in the top right corner of the page to navigate to your municipality's dashboard landing page.

The dashboard landing page gives government users an at-a-glace look at activity reported in your city or town, while allowing individual staff members to access issues they are responsible for reviewing and resolving.



The Dashboard Landing Page Current Activity and Issues by Source

Current Totals

View the total number of opened (orange) and acknowledged (green) issues in your municipality using the bar graph under "Current Totals". The number of issues that have been closed is displayed directly underneath.

Recent Daily Activity

View the number of issues that have been opened, acknowledged and closed each day over the past 4 weeks on an easy to read bar graph.





Issues by Source

Keep track of how residents are submitting issues to your city or town with the "Issues by Source" chart. This chart displays how service requests have been submitted over the last 90 days, tracking points of origin including SeeClickFix map widgets for your website, the SeeClickFix website, our iPhone, Android and Facebook apps, as well as "City Initiated" reports submitted by staff on behalf of residents.

The Dashboard Landing Page Issue Counts by Service Request and by Employee

Issues by Service Request

View current totals and recent daily activity by service request type under "Issues by Service Request". Click on any of the blue Service Request titles to navigate to a page listing all issues reported. See the "Issues Tab" section of this guide for more information about the features and functionality of the issues page.



Issues by Employee	Current Totals
Unassigned 175 issues fixed	0 100
SCF City Admin 0 issues fixed	0 2.5
SCF Code Enforcement 0 issues fixed	0 2 4
SCF Graffiti Abatement 1 issues fixed	0 A

Issues by Employee

The "Issues by Employee" list will display each staff person or department with a SeeClickFix government account.

When issues are automatically or manually assigned to a user, it will be reflected here. From "Issues by Employee" the user can click their account name to navigate to a list of issues they've been assigned.

The Issues Tab Manage your workflow and update residents

The Issues tab is where government users can dive into managing requests from residents and update citizens on the status of issues that have been reported using SeeClickFix tools for citizens.

DASHBOARD ISSUES MAP REPO	orts 🔅 Settings 🚼		CITY OF SCF -
Issues (370)			
Search for Geography Pick One	Assignee All assignees	Service Request Status All service requests Open, Acknow	owledged, Close 🗨 Q
Acknowledge Close Export Generate	Workorders		
□ ID ♦ SERVICE REQUEST	COMMENTS STATUS \$	ASSIGNEE SLA	CREATED -
413670 Parking (Residential c	2 Open	* Inspections	2013-02-17 🔅
Parking (Residential concerns) Sunnybrook South Red Deer, AB, Canada Parking in front of part of our driveway as we	I as constantly parking facing the	wrong direction when compared to traffic flow	Gaogle
413405 Parking (Residential c	1 Open	* Inspections	2013-02-17 🔅
Parking in the Alley 20 White Ave Red Deer, AB This grey ford always parks in the alley and in parked in front of the mail box for at least a w one complaining about this issue I would like	makes it difficult to squeeze by the wek, you guys gave him a ticket s it resolved its gone on long enoug	hey have been doing it for months also the grey fo o I'm sure you have him on file. Anyways I cant b h. I seen now you can upload pictures I will updat	ord was the the only e next time.

In this section of the dashboard guide you'll learn how to:

- Search for issues by service request, assignee, status, geography and keyword
- View request details such as pictures or answers to secondary questions
- Update the status of issues to acknowledged and closed
- Print work orders
- Assign issues to other users on your SeeClickFix government account
- Re categorize issues submitted under the wrong request type
- ...and more!

The Issues Tab Search for requests

Issues (350)

Search for				Assignee		Service Request		Status		
				All assignees	•	All service requests	•	Open, Acknowledge	ed, Closed, 💌	Q
Geography										
Pick One			<u> </u>							
Acknowledge	Close	Export	Generate Wo	orkorders						
□ ID \$;	SERVICE R	EQUEST	COMMENTS	STATUS 🗢	ASSIGNEE	S	LA	CREATED 🔺	

Use the SeeClickFix dashboard to easily search for the specific requests you're looking for. The search box at the top of the issues tab allows users to enter specific information about the request or requests you're looking, providing you with a list

Search for	Search for issues by keywords,
	address and more using the free
	text "Search for" field.

Generate a list of issues assigned to a specific account by selecting the user from the "assignee" list.

Assignee All assignees \$

Service Request	Narrow your results by service
All service requests	request type using the "Service Request" drop down menu.

Only interested in open and acknowledged issues? Check the status's you need here.

Status

Open, Acknowledged, Closed 👻

Geography	
Pick One	\$

Find issues reported within your account's smaller geographies by selecting from this list.

The Issues Tab The anatomy of an issue



The Issues Tab Update the status of an issue

Update an issue from open to acknowledged, or acknowledged to closed by clicking the gear next to the issue status, and selecting a new status from the menu.

	390939	Snow Removal (Sidew	0	Open	* Unassigned	2013-02-07
Ice c 194 W	overed sidew Viley Cres Red	valk Deer, AB		Acknowledge Close		Extension
Hous City	es #191, 194	and 195 have had ice covered sid	le walks for	weeks now. Very slip	pery and dangerous conditions.	
City City		askeu				an water

ſ	Acknowledge Issu	ıe(s)				(X
ı inta ə ur	Write a comment					* Pothole Close Street Light Ack Graffiti Ack	
	Attach Image	E At	tach Video			Graffiti Close	
rks (City parks) er, AB T4P 2Z4, Canada	2 a	Open	*	SCF Parks Dept	Pothole Ack Street Light Close General Ack	
an or ots c	n this corner of Reeves of kids not properly sur	s Cres. bu pervised s	ut the way pe someone is a	ople speed & s oina to aet hur	lide around that cor	General Close	are mar

You must enter a comment to update the issue. Enter text into the comment box or click the gear in the top right corner of the comment field to select one of your account's canned messages to populate the comment box with. You can also attach a photo or video to your comment when updating the status.

After entering your comment or selecting a canned message, click "submit" to update the status of the issue. The comment or canned message will now appear on the issue for all residents to see. The comment will also be included in an email sent to the reporter letting them know the updated status of their report.



The Issues Tab Assigning Issues to Users

Assign or reassign an issue to a user on your SeeClickFix government account by clicking the link under "assignee" or selecting "assign" in the gear menu.



Select the user you would like to assign the issue to from the "Assign Issue To" drop down menu and click "assign".

ľ	Assign Issue To	
Dity o	SCF City Admin City of SCF SCF City Admin SCF Public Works SCF Streets Dept. SCF Graffiti Abatement SCF Barks Dept	Assign Issue To
	SCF Code Enforcement	Assign Cancel

When an issue is assigned or reassigned to a new employee or department, the assigned user will receive an email notification letting them know about their new issue. The user can also see new issues assigned to them by clicking their user name in the "Issues by Employee" list on the dashboard landing page.

The Issues Tab Bulk Actions

Government users who need to update the status of multiple issues, export a list of issues, or generate work orders for multiple issues, can use the bulk action buttons at the top of the issues list.

For example: a government user wants to update the status of all open pothole issues to acknowledged. The user can use the search box to generate a list of all open pothole issues, click the check box highlighted below in green to select all issues, and click "Acknowledge" highlighted below in red. The user would then be prompted to type a comment or select a canned message that will be posted to all the issues they are acknowledging. The user can also select individual issues to update by checking the boxes highlighted in blue below.



Using the check boxes at the top of the issues list, as well as to the left of each individual issue, users can also export .CSV files of selected issues, and generate .PDF work orders for each issue.

The Issues Tab Sample Work Order



The Issues Tab Change Request Type

When residents submit a request to your municipality using SeeClickFix tools, they must select one of your service request types. Occasionally, an issue is reported under the incorrect service request type. If this happens, government users can change the request type of the resident's submission so that the issue is reflected correctly in the dashboard.



To change the request type of an issue, click the gear to the right of the issue you want to update and select "Change Request Type". From here you'll be able to select the correct request type from a drop-down list. Once updated, the change will be reflected throughout your dashboard.



The Issues Tab The Gear Menu

Clicking the gear to the right of each issue will display a list of actions that can be taken regarding that specific request.



- Change request type (page 13)
- Assign (page 10)
- Notes view internal notes between staff about this issue or add a new internal note to this issue
- Print print the issue
- Comment view the comments on this issue
- Flag notify a SeeClickFix administrator if the issue contains questionable or offensive language and you believe the issue should be deleted

The Map Tab View and Search a Map of Issues

The SeeClickFix dashboard's map tab allows users to view and search for the specific requests you're looking for. The search box at the top of the map tab allows users to enter specific information about the request or requests you're looking for, and displays the results of your search on an easy to read map of your city or town. Please refer to page 7 of this guide for more information about searching for issues.



The Map Tab Map Issues by Geography

If you have added smaller geographies within your municipality, such as council districts or neighborhoods, to your SeeClickFix account, you can view issues reported within those boundaries on the map by selecting it from the "Geography" search menu.

Below you will see a map of issues within the boundaries of a selected geography.

	Geography		
	Pick One	•	
	Ward 01		-
1	Ward 02		
Ĭ	Ward 03		
1	Ward 04		N
	Ward 05		
	Ward 06		
	Ward 07		ł.
	Ward 08		
	Ward 09		
4	Ward 10		
	Ward 11		1
	Ward 12		
	Ward 13	U	K
1	Ward 14		
1	Ward 15		ø
	Ward 17		
2	Ward 19		
1	Word 10		
	Word 20		
3	Walu 20	_	



The Map Tab Identify Trends with Heat Mapping

View a heat map of the issues reported to your government by checking the heat map option in the search box. The heat map feature can be used when searching for specific issues, or to view a map of all issues reported in your city or town.



Total Issues (191)

The Reports Tab Creating Activity Reports

Ropolito			
Start Date	End Date	Geographies	
01/09/2013	02/09/2013	City of New Haven, Ward 01, V 💌	Preview Report Generate PDF

The reports tab of the SeeClickFix dashboard allows users to generate and save reports detailing resident submissions. Enter the desired start date and end date, as well as the specific geographies (if any) you wish to include in your report. Click "preview report" to view the data before saving the report as a .PDF file on your computer.

Reports								
Start Date	End Date Geographies							
01/09/2013	02/09/2013	City of New Have	en, Ward 01, V 💌	Preview Report	Generate PDF			
Between Jan 09, 2013 and Feb 09, 2013								
502 issues were opened 265 issues were acknowledged 526 issues were closed The average time to acknowledge w The average time to close was 119.1		city initiated - 249 iphone - 48 widgets - 23 android - 12 web - 2 facebook - 0						
SERVICE REQUEST	OPEN	ACKNOWLEDGED	CLOSED	DAYS TO ACK.	DAYS TO CLOSE			
Tree Trimming	221	90	242	109.9	110.4			
Public Space & Streets	49	28	38	0.7	24.4			
Trash	32	23	49	0.2	66.0			
Parks Request	4	37	61	235.5	300.3			
Other	36	4	49	0.2	158.5			
Potholes	27	29	23	46.8	37.8			
Sidewalks	19	18	9	13.9	48.4			
Traffic/Road Safety	30	4	10	0.5	66.1			
Street Lamp	24	2	9	1.0	67.3			
Illegal Dumping	12	6	10	0.9	64.9			
Parking Meter	8	6	4	0.8	20.8			
Graffiti	9	1	5	0.9	76.0			

The Reports Tab Sample Report – PDF Format

— City Of New Haven

Between Jan 09, 2013 and Feb 09, 2013

551 issues were opened

266 issues were acknowledged

528 issues were closed

The average time to acknowledge was 76.3 days.

The average time to close was 119.6 days.



SERVICE REQUEST	OPEN	ACKNOWLEDGED	CLOSED	DAYS TO ACK.	DAYS TO CLOSE
Tree Trimming	221	90	242	109.9	110.4
Public Space & Streets	49	28	38	0.7	24.4
Trash	32	23	49	0.2	66.0
Parks Request	4	37	62	235.5	295.6
Other	36	4	51	0.2	153.5
Potholes	27	29	22	46.8	39.5
Snow/Storm Issue	48	1	0	0.0	0.0
Sidewalks	19	18	9	13.9	48.4
Traffic/Road Safety	30	4	10	0.5	66.1
Street Lamp	24	2	9	1.0	67.3
Illegal Dumping	12	6	10	0.9	64.9
Parking Meter	8	6	4	0.8	20.8
Graffiti	9	1	6	0.9	63.5
Pedestrian Signal	6	6	2	1.7	2.3
Traffic Signal	7	6	1	3.0	17.1
Signs	6	5	2	0.2	33.8
Policing Issue	6	0	4	0.0	143.4
Private Property Issue	3	0	6	0.0	179.3
Abandoned Auto	4	0	1	0.0	700.9
Fire Hydrant Issue	0	0	0	0.0	0.0
GEOGRAPHY	OPEN	ACKNOWLEDGED	CLOSED	DAYS TO ACK.	DAYS TO CLOSE
City of New Haven	549	265	527	76.5	117.3
Ward 10	23	14	31	96.0	156.8
Ward 12	14	6	8	47.4	93.1

Jan 09, 2013 to Feb 09, 2013

1 of 1