

WRITER: KEVIN MILES
CLIENT: IIS
PROJECT: CityServe User Manual Script

CITYSERVE

(VO): With CityServe, each individual user logs onto the system with their own user name and password. As you can see, this is a tickled activity that allows you to identify any cases and any issues that have been assigned to you.

You can search for anything that's due, anything that's past due, or anything that falls within a particular date range. For management purposes, you can identify any tasks that have been assigned to you or as well as any tasks that are assigned within your workgroup.

City Manager lets you identify all activities going on within the City as well as within your department. As you can see, in this example, there are eight cases and two issues that have been assigned.

All you have to do is click on the cases tab, and you'll see any information relating to the activities that need to be completed.

You can also see the case number, whether it's open or closed, where it came from, and any notes relating to the case. In addition, you have the ability to identify any other issues concerning the case.

A cases is basically a written record of a citizens complaints about concerns they have with the physical infrastructure in their neighborhood. For example, streetlights, sidewalk cracks, or potholes needing repair.

An "issue" is basically is an escalated case where multiple citizens may have an opinion about a given problem or situation. An example might include citizen concerns about the decision to tear down a historic city landmark, where some citizens are for it and others are against it.

Whatever the case may be, CityServe gives you the ability to track these issues quickly and efficiently.

As you can see here, we have tool and a number of tool bar buttons. Each one is a shortcut into the different areas within the system.

You have the ability to search for cases, citizens, issues, events and organizations. City Serve can also be fully customized on several different levels.

First of all, each individual user has the ability to set up their own options within City Serve. You can change the application name to your particular city. You can change the default city so that every complaint defaults to your particular city. The same thing holds true for the state.

You also can identify what area code most of the complaints are coming from. You can choose to have your tickler file automatically refresh every so often to identify any activities that have been assigned to you throughout the day.

You can also choose whether your tickler file is opened when the application starts, or you can choose to have the tickler file closed when the application starts, if no activities are assigned to you.

The drop-down menus you're going to see within the system are conveniently arranged by the population of the city. So, before we come out to install and train your employees on the system, we send out a workbook allowing you to identify beforehand, what type of activities occur within your city.

You can identify what type of council districts you may have, whether your council members are elected at large, or if they are elected by district.

You can identify the activities or associations specifically related to individual cases. You also have the ability to categorize the types of complaints you are likely to receive within your city, or within the department you work in.

So basically, you identify what code corresponds to the description, what department handles that particular category, and what work group may access those categories.

Obviously, within the city, each individual department or workgroup as it is stated here, might have access to different activities or categories, depending on what their function is within your city.

Now you're going to learn how to search for a case. If you press on the case search button, the Case Search window will come up.

You can search by case number if you know the number by entering that information here. You can also search by street number or street name.

Let's say that you wanted to identify a case that was on Main Street. You would simply type in "Main" and all information relating to the cases on Main Street would come up.

You can also search for citizens that are associated to any cases. For example, if "Jim Smith" calls in, you can identify all of the cases that have Mr. Smith associated with them.

You can also search for any cases by department. This can be customized to each city, or you can search for any cases by category. For example, all of the cases that fall within a given city that related to abandoned vehicles.

You can also search by approximate address. This comes in handy, because you don't need a specific address to lodge a complaint. For example, let's say a citizen calls in and reports a dead animal on the side of the road, and all they know is that it's somewhere between Main and Southern. CityServe lets you easily identify all cases that fall within that approximate location.

You also have the ability to search by description. You can bring up all cases that are in the system that have anything to do with potholes, for example. That way you can see all the different cases within the system concerning potholes.

Now you'll see all of the cases in the system. Now you can see the case number, the address, whether the case is opened or closed, and any citizens associated with specific cases.

Now you would scroll down based upon the criteria that you entered to identify what case you're looking for. Once you've identified the case, you would double-click on it, causing the Case Detail window to open up.

Within the Case Detail window, you can see the case number, all case detail, and all the information relating to the case, within this window.

As you can see, it accesses that information using a tabbed window interface. All the different screens within the system are designed to look similar, so that users need very little time to learn the system.

You can see the case number, as well as when it was opened or closed along with what workgroup it's in.

In this case it could be the City Manager's Office, the Streets Department, or whatever department you're in. It could be a council district that the complain fall within depending on whether it's applicable to this particular city.

You can identify what the problem addresses, the approximate address if it exists, and a basic description relating directly to that complaint.

On the Citizens tab, you have the ability to track all of the citizens that are associated with this complaint. Obviously within one complaint you can have multiple citizens calling in , in reference to the same complaint.

Perhaps there's some flooding going on in a particular area of town and you've received multiple calls on this issue.

When you track that complaint with CityServe you only have to record that complaint once. From that time on, you can keep track of all citizens associated with that complaint, and identify what their association is.

For example, you can find out whether they are a complainant, neighbor, tenant, owner, or a tourist on vacation.

If you wanted to see any information relating directly to that citizen, all you have to do is double-click on the name and a Citizen Detail window will come up. Similar to what you would do in the Citizen Search window.

So whether you've searched for a citizen using the Search tab or you've double-clicked on the Citizen in the Case Detail Window, the Citizen Detail window will come up.

You can see their home and business addresses, all phone numbers relating to that citizen, as well as any pending cases, issues, events, organizations or mailings that that citizen may be associated with, and what their association is to that particular case.

Next you'll see the Work Flow tab. It gives you the ability to see in chronological order of the activities relating to specific complaints and enter any additional notes relating to that activity.

You can also see who the complaint was assigned to, what action was taken, who took the action, when it's due, if it's been completed, the date that it was completed, and any other information specifically relating to that activity.

The Comments tab, is a dated and user-identified field with an unlimited text field. It gives you the ability to enter any additional information relating to the case that you may not be able to put in any other areas within the system. Whether it involves tracking phone conversations with citizens or any other information that helps you provide additional customer service.

For example, if the citizen works nights and they don't want any city personnel to contact them until after 2:00 p.m., you could note that in the Comments area.

City Serve also gives you the ability to link issues and cases together. In this case you can see that an issue has been associated to this case within this area.

If you wanted to see anything relating to that issue, all you'd have to do is double-click on the issue and the Issue Detail would come up. Or you could search for issues using the Issue Search tab.

Again, the Issue Detail window is very similar to the Case Detail window. You see basic information relating to the issue, the issue number, if it's open, when it was opened or closed, and a basic description relating to the issue.

In this case, within the Citizens tab, you have the ability to track the citizen's opinion, whether they are for or against an issue, as opposed to whether they're a neighbor, complainant, tenant or an owner within the standard Case Detail window.

You can see tabbed-window interfaces with very similar tabs including. "Work Flow", "Comments", "Cases", and others specifically relating to this issue.

Now, we're back within the Case Detail window on the Categories tab. The Categories tab allows the city to categorize complaints.

Obviously, a single complaint might fall within multiple categories and multiple departments within the city.

Let's say for example, that there was a storm and a tree fell down in the middle of the street. You would need to get police officers to the scene to re-direct the traffic, as well as a road crew to remove the trees.

As you can see, these drop-down menus can be customized to meet the needs of each individual city. You can list all and any categories specific to that particular department.

City Serve also gives you the ability to link cases according to type. This can be very effective for studying related cases or if there is something specific going on within the city , you link those cases together for future reference.

City Serve also has full document imaging capabilities. You can attach documents electronically, whether, like in this case you're using Microsoft Word, Word Perfect or Lotus Notes.

Here, you can see a thumbnail sketch of what that document is. You also have the ability to attach any scanned documents and store them as a bitmap image.

If you wanted to access the document, all you would do is double-click in the window and the parent application, in this case Microsoft Word.

At this point, you could adjust any information in the document you wanted to. For instance, you might need to change a document and print it, or send it electronically to somebody within a different department that needed it.

After making the changes, you would just close that window and those changes will be saved and referenced in the link to City Serve.

On the Mailings tab, you have the ability to identify any type of mailings that have gone out in relation to this case.

City Serve also gives you the ability to set up auto mailings up for different types of functionality within the city. For example, you may want to automatically send the citizen a letter every time that you open up a new case stating, "Dear Citizen, We appreciate your concern in this matter. This is your case number, and a contact number. Please call us if you have any questions." That way the citizen knows that you have identified their need and that you're working with them.

You can set it up for surveys, acknowledgment letters, recycling brochures, or whatever it happens to be. All you have to do is send it to the printer and send it out. City Serve will automatically merge all the new information into the document.

City Serve also has e-mail capabilities that are easily integrated with whatever Internet services provider you may have.

To send an e-mail from within City Serve, all you would do is click new, enter the subject of the e-mail, compose the e-mail and send it.

This is especially helpful when you have to communicate with a different department within the city that is not using City Serve, but needs to take action on a complaint. City Serve automatically attaches all case information relating to specific cases and gives you the ability to remove any information you like not pertinent to the case.

If you accidentally click on too many items, pushing the Reset button will bring that information back for you. You also have the ability to do that within the case information. For example if you wanted to delete and address. At this point, all you would need to do is press Send. It would then automatically integrate with your existing e-mail system and then go to that user.

Case Wizard allows you to get all of the information into a specific case. You just click on and a New Case Wizard file will launch. As you can see, some tabs you've just seen are still available on the left-hand side.

This can also be customized like in other areas of CityServe. You can arrange the set up in whatever order you choose. In this case, it's set up to receive information in this order.

You may like to gather citizen information first, then case and determine what activities need to be assigned to the case. You would just enter whatever type of information you like. In this case it's a complaint about a pothole, located in the intersection of Southern and Main.

Since the citizen doesn't know the exact address of that pothole, you would enter the basic information relating to it. Pressing "Next" or "Enter", would place with all information recorded about this case.

Let's say for example, that the Dean Cronkwright calls in. When you first tab, it will automatically search the system to see if that citizen exists. If they do, it will automatically bring up their file so you don't have to re-enter the information. You can also add names, search for names within the system and add new names to the case

At this point you'd identify what activity it is that needs to be completed. Let's say that you needed to route this information Mike Alman in the Streets Department. You would double-click on the Date field causing a calendar to come up. Now you could enter the date you need to have the activity completed. As you can see on the tickler file, the next time Mike Alman signs in, he'll know this activity has to be completed by Friday. You could also assign a reminder to yourself by double-clicking on the Date field and enter any additional comments related to Mr. Cronkwright.

You can add any additional categories to the complaint at this time, identifying what department and category it falls in. You can also add and delete categories as you see fit.

At this point you can scan any documents you need to, to remove this complaint from a document by pressing Next or Enter. You could also send e-mail to the Streets Department to make sure the pothole gets repaired. Just click "Finish" to make sure the case is entered into the system.

If you want to reopen this case, just press the Case Search button and it will come back up. In this case, we're searching by entering the word pothole in the description area. . As you can see, doing this will retrieve all cases in the system dealing with potholes.

With City Serve you also have the ability to track events by type and organization. Now, for example, we're searching for an existing event in the using the Event Search button. Remember, you can enter any information you're looking for, whether it's the name of the event, date range, the event number or a basic description. In this case, we're looking for a wine tasting.

Just press Enter and any information or events matching the search criteria will come up. Once you've identified what it is that you're looking for, you'd double-click on it and the Event Detail window will come up.

Here you can see what type of event it is, the name of the event, the organizer of the event, location and a basic description of the event. You

can also see information about the people attending the events, whether they're an attendee, media sponsor, or any other association you want to identify.

You also have the ability to track any type of organizations within your city or that are specific to the department that you may work in. Let's say that you want to find the local Big Brothers and Big Sisters. You would just enter a basic description, and that match will come up in your Organization Search window.

You would just double-click on your selection and the Organization Detail would come up, giving you all relevant information about the person and the organization.

You could find out what title or position people have within the organization, for example, and provide that information as a service to the citizens in your city.

The Organization Detail will come up allowing you to see everything you need to know about the organization. Where it's located, the name of citizens who are members, contact persons, who runs it, and any other information you need to know in relation to that organization.

As an added feature, City Serve comes with built in reports. They can be easily integrated with any third-party reporting modules, such as like Reports or Infomaker.

You have the ability to bring up and open reports based on Category, Aging Report, an Open Case Listing that lists all the cases open within the system, a Closed Case Listing, a Statistical Report and any type of system-wide cases.

This is the Open Case by Category Report. It allows you to identify dates you'd like to see a particular report on and what specific workgroup or department within the city it would relate to.

You can see the category the case falls in, how many cases are associated with it that their problem addresses and whether the cases are opened or closed.

City Serve also has graphical reporting capabilities. It can display case statistical reports. Within the Case Statistical Report, you can see the cases broken down by category and the number of cases associated to those categories.

With a pie chart you can identify the percentage of cases that fall within your city, or identify whether types of cases are on the rise or decline. You can also identify any areas that need additional work, or provide service for those citizens that need it. In addition to the reports that come built into the system, you can create your own custom queries.