

Code Enforcement

Sewer

Citizen Engagement

FEMA Reporting

iWorQ

Pave

ties

Business Licenses

Stormwater

Payment
Processing

Permitti

Fleet Management



Citizen Engagement

Quick Start Guide

Welcome to Citizen Engagement

iWorQ is designed so you can customize the software to meet your Citizen Engagement needs. This guide was created to help you start performing common tasks in the Citizen Engagement system through step-by-step explanations and screen shots.

For additional help or questions, please call technical support at **888.655.1259**.

Technical support and training are always free!

Table of Contents

- Creating/Managing Requests.....2
 - The Citizen Engagement interface
 - Advanced and saved searches

- Data Fields.....5
 - Adding, editing, deleting, and reordering fields

- Employee Information.....7
 - Adding an employee and department

- FAQ Information.....8

- Polls Information.....9

- Setup Information.....10

- Reports.....11
 - Building, designing, exporting reports

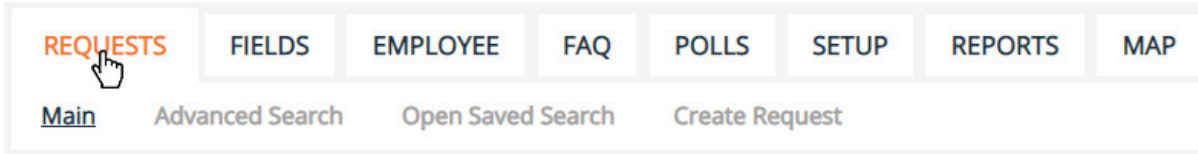
- Using the Map.....12

- Dashboard Preferences.....14

- Dashboard Overview.....15

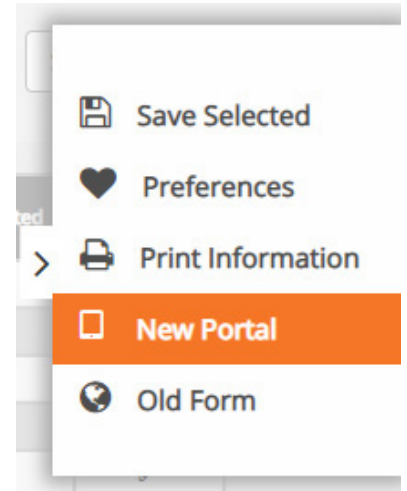


Creating/Managing Citizen Requests

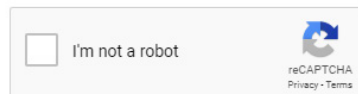


View Customer Page

- 1 - Click on the new portal button from the side menu.
- 2 - A new web page will open and show what customers will see when they want to submit a request.
- 3 - You can submit a request to test your citizen request application. Then close the customer page, open the citizen request application again and refresh the data.

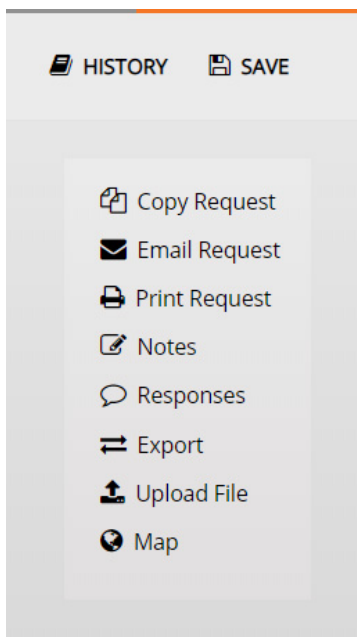


Once a citizen submits a request, they receive a request number which allows them to check back on the progress of their submission.



- 4 - Click anywhere in the row of the request. From within the request, you can email the request, add a note, respond back to the requestor, or export the request into another application.

- 5 - Click save in the top, right corner of the window to save any changes.



The Citizen Engagement Interface

The screenshot displays a web interface for managing requests. On the left, a form titled "REQUEST" contains various input fields and dropdown menus. On the right, a menu of actions is visible, including "Copy Request", "Email Request", "Print Request", "Notes", "Responses", "Export", "Upload File", and "Map".

Request Form Fields:

- Request #: 249748825
- Request Date: 10/01/18 15:09
- Permit Type: Electrical
- Address or Location: 1125 W 400 N Logan, UT
- Departments To Notify: --
- Requestor: John Hansen
- Requestor E-mail: jhansen@iworq.com
- Received By: --
- Preferred Method of Contact: No Need to Contact
- Type of Request: Assist Office Staff
- Cell Phone: 123
- Phone Number: 888.655.1259
- Received Via: --
- Priority: --
- Valuation: 10.00

Action Menu:

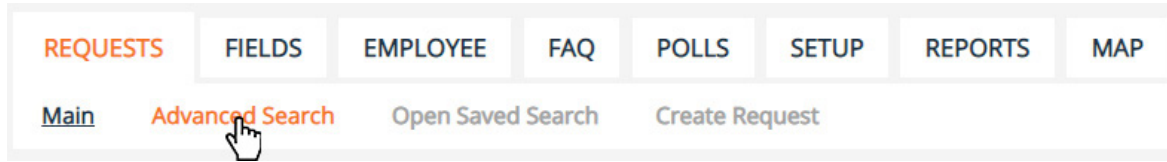
- Copy Request
- Email Request
- Print Request
- Notes
- Responses
- Export
- Upload File
- Map

Annotations:

- Opens the quick find menu for the request.
- Creates a copy of the request, assigns it a new number, and immediately displays the new request.
- Saves your changes. It must be clicked or no changes will be made.
- Emails the citizen request to employees.
- Prints any recorded data.
- Adds detailed notes.
- Sends a response to whoever made the request.
- Sends the request into another application.
- Opens a window to upload files or pictures.
- Opens up the map.

Your pop-up blocker must allow pop-ups from iWorQ or many of these buttons won't work.

Using the Advanced Search



1 - Click on advanced search in the sub menu.

2 - You can search by any of your fields. Click the search button when you're finished entering your search parameters.

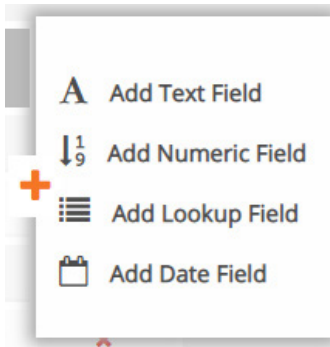
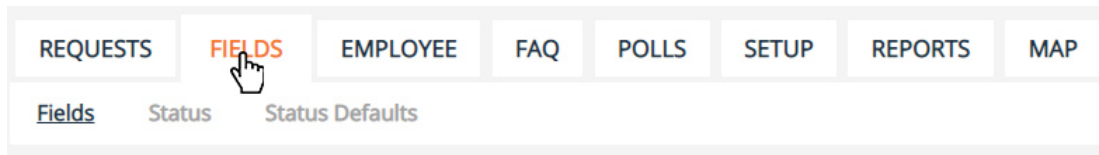
3 - If you plan on running a search multiple times, you can save the search parameters by clicking save search at the top of the window.

A screenshot of the 'ADVANCED SEARCH' form. The form is titled 'ADVANCED SEARCH' and has two buttons at the top right: 'SAVE SEARCH' and 'SEARCH'. The form contains several input fields and dropdown menus: 'Request #' (text input), 'Request Date' (text input), 'Permit Type' (dropdown menu with 'Plumbing' selected), 'Address or Location' (text input), 'Departments To Notify' (dropdown menu), 'Requestor' (text input), 'Requestor E-mail' (text input), 'Received By' (dropdown menu), 'Preferred Method of Contact' (dropdown menu), 'Type of Request' (dropdown menu with 'Drainage Problem' selected), 'Cell Phone' (text input), 'Phone Number' (text input), 'Received Via' (dropdown menu), 'Priority' (dropdown menu), 'Valuation' (text input), and 'Square Feet' (text input).

Saved searches will allow you to run reports on certain cases. For example, if you want to run a report on only the 'open' cases, you can create a saved search and use it when creating a report. For more information on reports see page 11.

Customizing Data Fields

Adding Fields



1 - Click on the Fields tab.

2 - On the right-hand side of the screen, there are 4 options to add a new field. Click on the button that corresponds with the field you would like to add.

Numeric Field

Accepts numbers & decimals

Text Field

Accepts text, symbols & numbers

Date Field

Accepts numbers formatted as dates

Lookup Field

Creates a drop down box

Adding Values to a Lookup Field

The drop down will appear blank until values have been added.

Phone Type	Values	lookup	10	x
Source	Values	lookup	11	x

1 - Click the values button and a new window will open.

2 - Click add value, type a value then click add.

Deleting Fields

1 - Click on the red X on the right-hand side of the page. Then click Yes to confirm.

Phone Type	Values	lookup	10	<u>X</u>
Source	Values	lookup	11	X

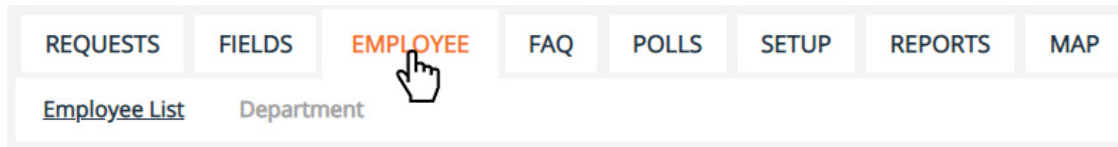


Reordering Fields

1 - To reorder the field position, click and drag the field that you would like to move. Let go of the field when it is in the spot you would like it in.

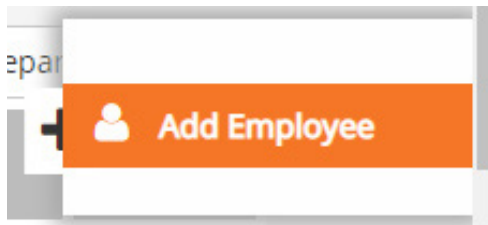
Edit/View	Field ID	Field Name	Lookup Values	Type	Order	External	Required	Email	
	133507	Permit Type	Values	lookup	1	Yes		Email	X
	100002	Address or Location		text	2	Yes	Yes		X
	71199	Departments To Notify	Values	lookup	3			Email	X
	89238	Requestor		text	4	Yes	Yes		X
	90875	Requestor E-mail		text	5	Yes			X
	79325	Received By	Values	lookup	6			Email	X
	73841	Preferred Method of Contact	Values	lookup	7	Yes		Email	X
	78042	Type of Request	Values	lookup	8	Yes		Email	X
	92182	Cell Phone		text	9	Yes			X

Employees



Adding an Employee

1 - Click on the add employee button from the side menu.



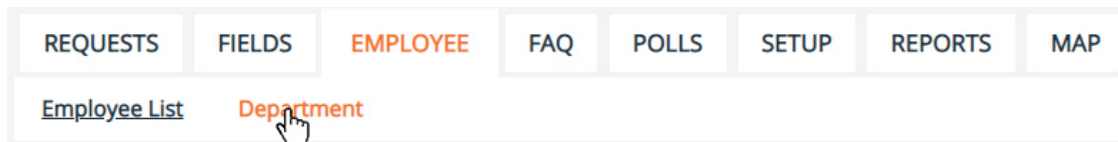
2 - Fill in the employee information and click add employee.

Employee Name	<input type="text" value="New Employee"/>
Email	<input type="text"/>
Department	<input type="text" value="Full-Time"/>
Employee #	<input type="text"/>
Rate	<input type="text" value="0.00"/>
Active:	<input type="text" value="Active"/>

ADD EMPLOYEE

An employee must have an email entered to appear in a check list when you use the email case option.

Adding a Department



1 - Click on the department button from the sub menu.

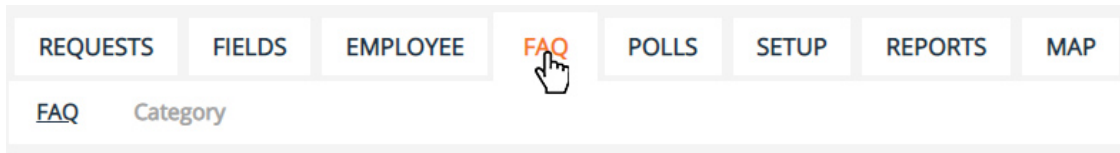
2 - Click on add department, enter a name and decide if it should be added to this application only or all applications. Click add.

Department Name	<input type="text"/>
Type	<input type="text" value="This application only"/>

CANCEL **ADD**

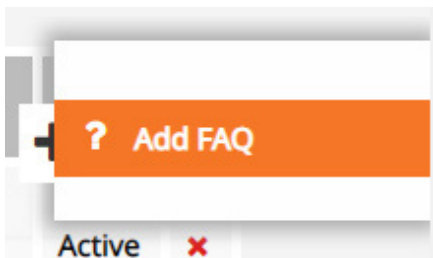
+ Add Department			
			001 GEN ENG - DRAINAGE
			002 GEN ENG - WATER DIST
			003 GEN ENG - WATER TREAT
			004 GEN ENG - SEWER
			005 GEN ENG - AIRPORT
			006 GEN ENG - STREETS
			007 GEN ENG - SOLID WASTE
			008 GEN ENG - PARKS & REC

FAQ



Adding FAQs

1 - Click on the add FAQ button from the side menu.



Add FAQ

Category: General Question

Question:

Answer:

Active: Active

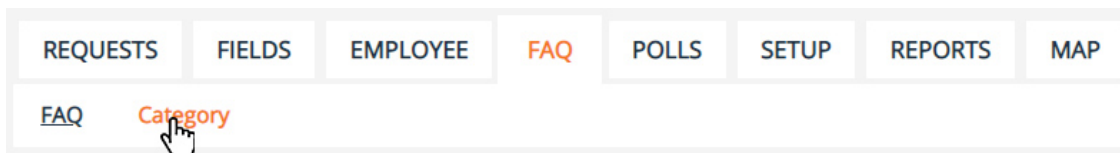
ADD FAQ

2 - Fill in the FAQ information and click add FAQ.

3 - To edit an existing FAQ, click on it from within the dashboard or click on the pencil icon next to the corresponding FAQ.

4 - To delete an existing FAQ, click on the red x on the right side of the screen, next to the corresponding FAQ.

FAQ Categories



1 - Click on the category button from the sub menu.

2 - Click on add category, then enter the new category name and click add.

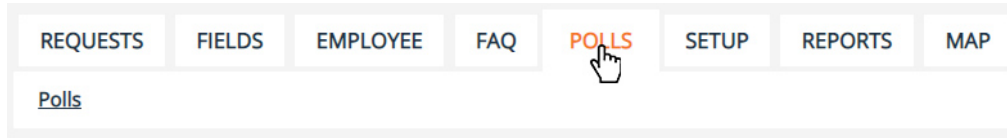
3 - To edit a category, click on it from the list, enter the new information and click save. To delete, click on the red x that corresponds with the category you want to remove.

Category

+ Add Category

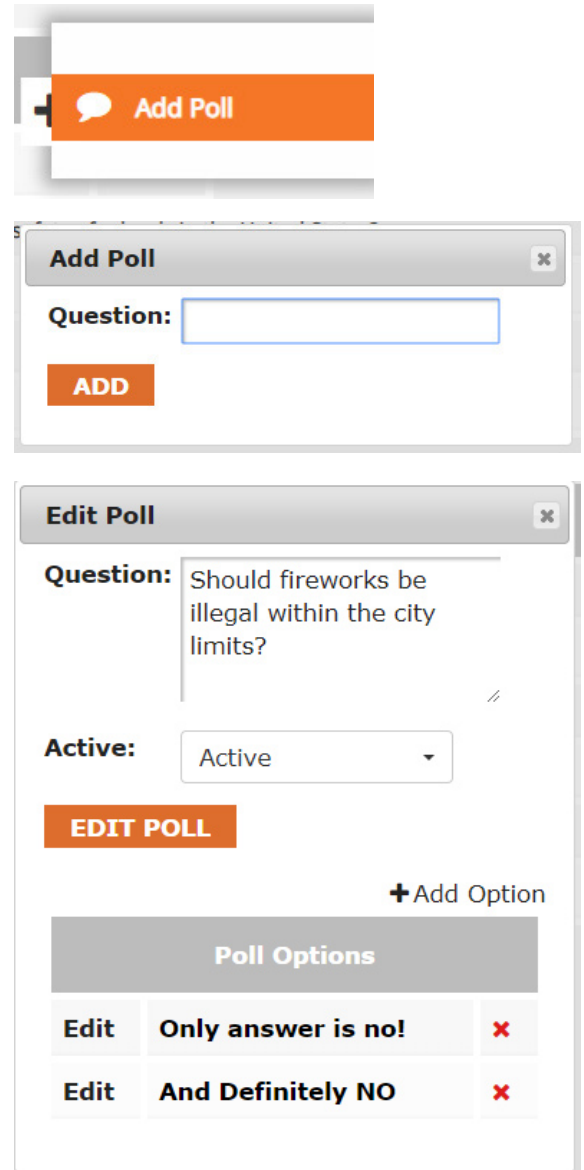
Edit	General Question	x
Edit	Public Works	x
Edit	Utilities	x
Edit	Administration	x
Edit	Other	x
Edit	Court	x

Polls



Adding Violations

- 1 - Click on the add poll button from the side menu.
- 2 - Fill in the question and click add.
- 3 - To add options and edit a question, click on the pencil icon in the dashboard that corresponds to the question you need to edit or add to. From the window that pops up, change the information and press edit. To add an option, click on + add option.



Setup



- 1 - Enter the web address of your city's website in the URL text box.
- 2 - Write a message in the disclaimer text box, this text will show up on the form when first opened up.
- 3 - Contact customer support for any questions or assistance with setup.

Field Mapping



- 1 - Click on the field mapping button from the sub menu.
- 2 - Choose the application that you would like to create the link between and click edit.
- 3 - Make the associations between Citizen Requests and the other application.

The 'Create Field Mapping' dialog box is shown with a 'CANCEL' and 'SAVE' button at the top. It features two columns: 'Citizen Request Fields' and 'Export Fields'. The following table shows the mappings:

Citizen Request Fields	Export Fields
Permit Type	Permit Type
Address or Location	Applicant Address
Departments To Notify	Nothing selected
Requestor	Applicant Name
Requestor E-mail	Nothing selected
Received By	Nothing selected
Preferred Method of Contact	Phone Type

The 'Create Field Mapping' dialog box is shown with a table of applications. Each row has a checkmark in the 'Active' column, the application name in the 'Export Application Name' column, and an 'Edit' button in the third column.

Active	Export Application Name	
✓	Work Management	Edit
✓	Code Enforcement	Edit
✓	Fleet Management	Edit
✓	Permit Management	Edit

Creating Reports

Building a Report



1 - Click on the reports tab in the menu.

Request Reports		
Report Name	Report Description	
Request Report	Reports requests based on a date range in grid format.	Build
Request Detail Report	Reports requests based on a date range in grid format along with notes and exported items.	Build
Request Summary 1	Summarizes requests by: Current Month, Month Last Year, Current Year to Date, and Last Year To Date	Build
Request Summary 2	Summarizes requests by Date Range	Build

2 - Choose from the options which report you would like to run. Click the build button that corresponds with the correct report.

3 - Pick the from the fields which data you would like displayed in your report. You can control the order of the fields by clicking the up or down arrows. When you're finished, click the run button.

4 - Choose the date range for the report. You have the option to use a saved search to further narrow your results. When you've selected the criteria, click run to view or print the report, cancel to go back, or export as .csv to download the data in a spreadsheet.

**Please contact iWorQ at
888.655.1259 for any
questions on running
reports.**

Using the Map

REQUESTS FIELDS EMPLOYEE FAQ POLLS SETUP REPORTS MAP

Main Advanced Search Open Saved Search Create Request

Map Dashboard

Select the color to display search results

Choose from saved searches to display specific parcels

Select the background layer to display

Resets the zoom

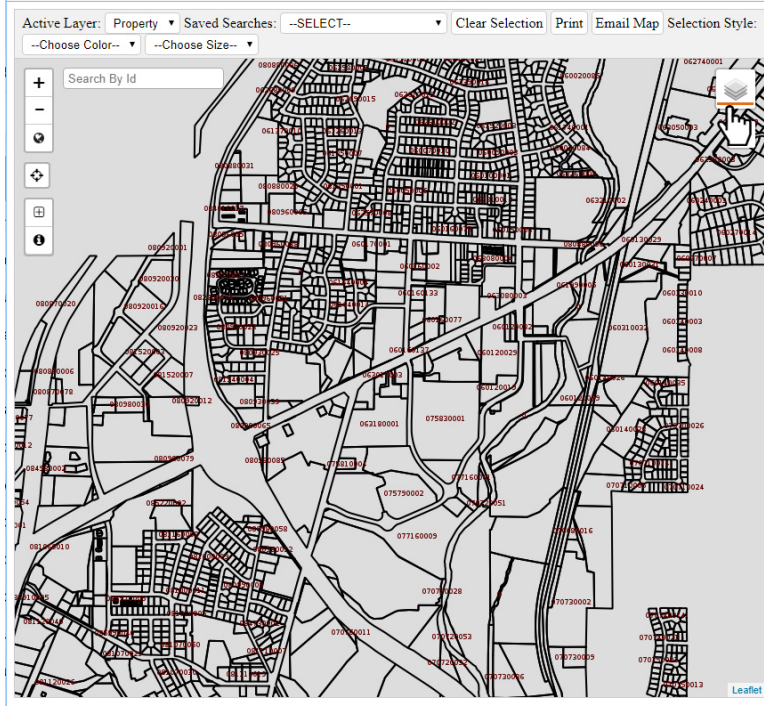
Finds your current location

Select one or more parcels

Identify a property

The screenshot shows a map dashboard interface. At the top, there are navigation tabs: REQUESTS, FIELDS, EMPLOYEE, FAQ, POLLS, SETUP, REPORTS, and MAP (highlighted with a hand cursor). Below these are links: Main, Advanced Search, Open Saved Search, and Create Request. The main area is a map of a residential neighborhood with property parcels outlined in black and some highlighted in red. The map interface includes a search bar with 'Search By Id' and a search icon. To the left of the map are zoom controls (+, -), a location pin icon, a selection tool icon, and an identify tool icon. At the top of the map area, there are controls for 'Active Layer' (set to 'Property'), 'Saved Searches' (set to '--SELECT--'), 'Clear Selection', 'Print', 'Email Map', and 'Selection Style'. Below these are 'Choose Color' and 'Choose Size' dropdown menus. On the right side of the map, there are icons for background layers, a search icon, and a zoom control. The map shows streets like Airport Road, Peterson, and various numbered streets. Property parcels are labeled with IDs like 061440000, 061390000, etc. The bottom right corner of the map area has a 'Map data © openstreetmap contributors' watermark.

Changing the Background View

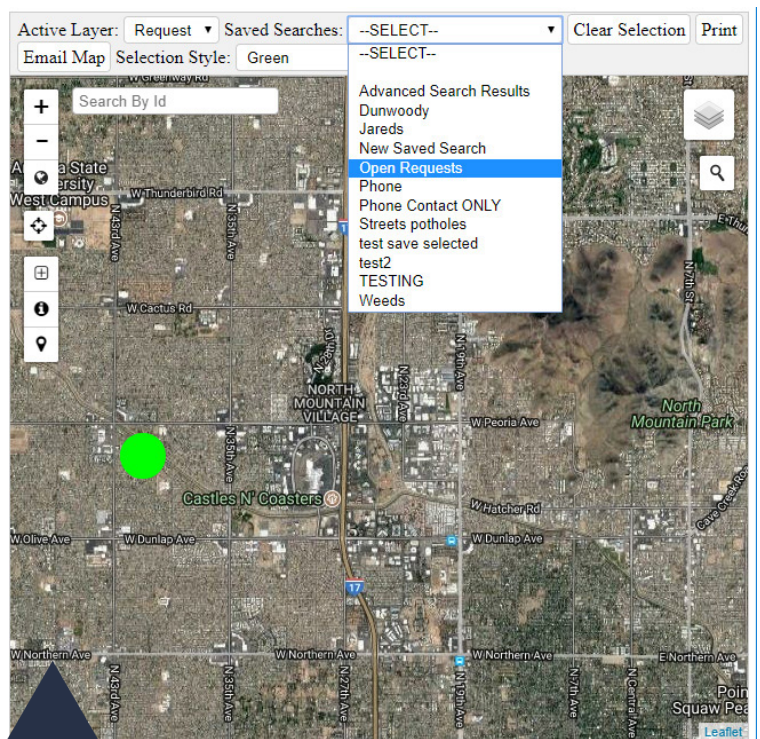


1 - To adjust what layer is displayed behind your data, click on the layers button at the top right side of the window. Select an option from the list to change your view.

Viewing Saved Searches

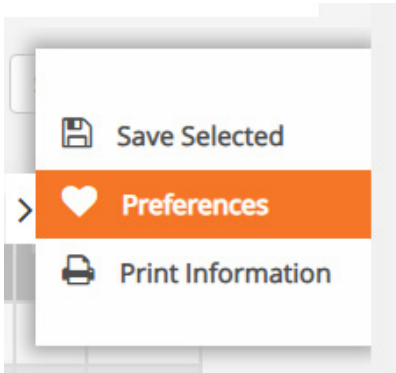
1 - Saved search data in the map can be displayed by selecting a search from the drop-down menu at the top of the window. The results of the search will be highlighted in your chosen color.

2 - To learn more about a request, click on the identify button and then on the highlighted shape.

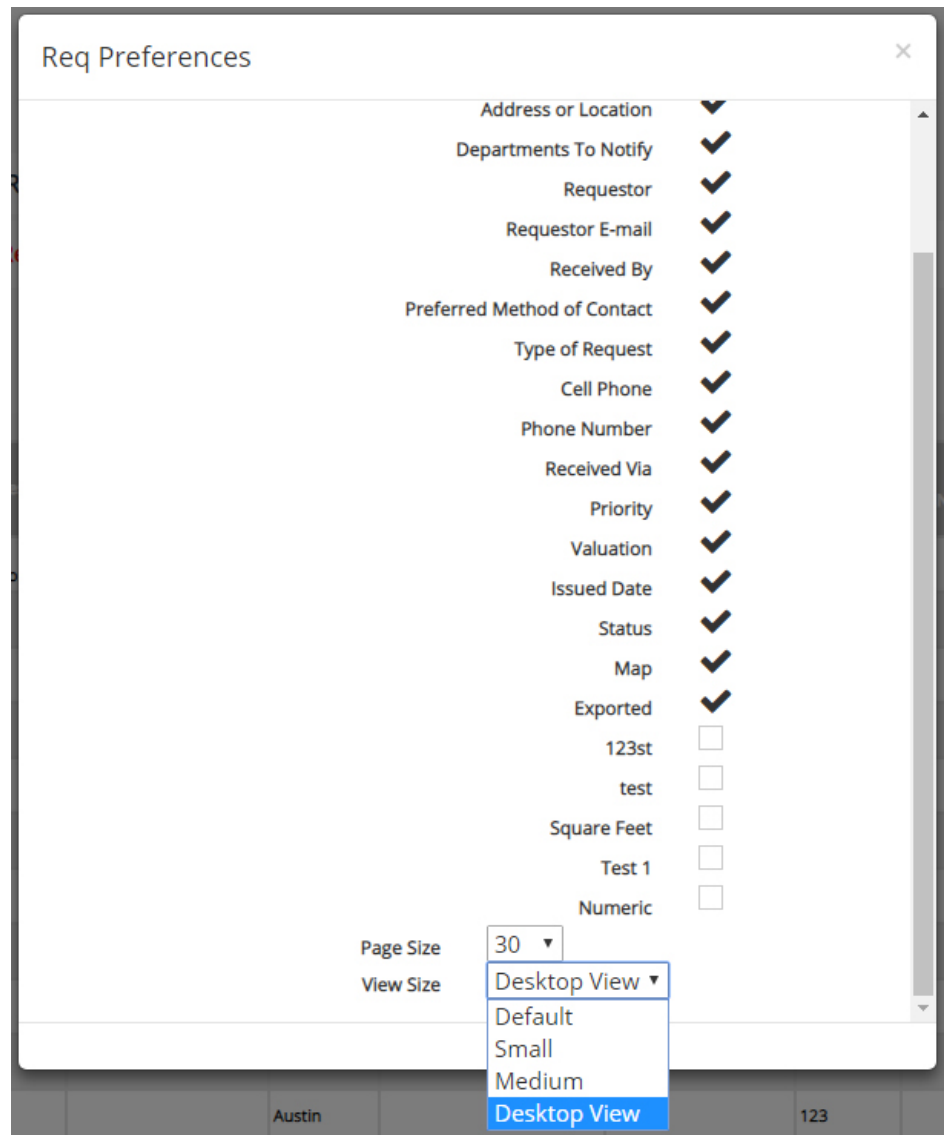


Dashboard Preferences

1 - Customize the size or display of your application by selecting the preferences button from the side menu.



2 - From within the preferences window you can select which fields you want to display on your dashboard, how many lines of data you would like to see on one page (using page size) and what size the information is displayed at (using view size).



Dashboard Overview

Enter specific parameters to search the data Create/enter a request manually

[REQUESTS](#) [FIELDS](#) [EMPLOYEE](#) [FAQ](#) [POLLS](#) [SETUP](#) [REPORTS](#) [MAP](#)

[Main](#) [Advanced Search](#) [Open Saved Search](#) [Create Request](#) [Old Request Screen](#)

View a saved search or specific time frame Save selected, adjust preferences, print information, view the webportal

Change the details of a request [Select View](#)

ALL

Selected	Request Date	Request #	Permit Type	Address or Location	Departments To Notify	Requestor	Requestor E-mail	Received By	Preferred Method of Contact	Type of Request	Cell Phone	Phone Number	Received Via	Priority	Valuation	Issued Date	Status	Me	Reported	Edit/View
<input type="checkbox"/>	08/28/2018 15:40	244904927	Building	Iworq		Nikki Ethington	Nikki@iworq.com	Diana	Email	Community Events	123-222-2223				100.00	08/28/2018	Open	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	08/28/2018 15:32	244903122	Plumbing	Test		TEST			Email	Assist Other Departments	123			Emergency	.00	08/28/2018	-1	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	08/28/2018 14:28	244879657	Building	test	02: Shop's Maintenance	test	test	Austin	Cell	Assist Other Departments	123	test	Address 2		.00	08/15/2018		<input checked="" type="checkbox"/>		
<input type="checkbox"/>	08/15/2018 18:15	243085487	Electrical	1125 W 400 N Suite 102	02: Shop's Maintenance	5	jholland@iworq.com	Austin			55		Address 2		.00			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	08/15/2018 18:14	243085126																<input checked="" type="checkbox"/>		
<input type="checkbox"/>	08/15/2018 18:12	243084765	Mechanical	661 Eagle View Ct	02: Shop's Maintenance	Jared	jholland@iworq.com	Austin			rr		Address 2		.00			<input checked="" type="checkbox"/>		
<input type="checkbox"/>	08/15/2018 18:04	243083682	Mechanical	661 Eagle View Ct	02: Shop's Maintenance	me	jholland@iworq.com	Austin	Cell	Brakes	4357707709		Address 2		.00			<input checked="" type="checkbox"/>		
<input type="checkbox"/>	08/15/2018 12:41	243026644	Building	661 Eagle View Ct	02: Shop's Maintenance	Jared	jholland@iworq.com	Austin			4357707709		Address 2		.00			<input checked="" type="checkbox"/>		
<input type="checkbox"/>	08/15/2018 11:49	243011121			02: Shop's Maintenance			Austin			123		Address 2		.00			<input checked="" type="checkbox"/>		
<input type="checkbox"/>	08/15/2018 11:49	243010399			02: Shop's Maintenance			Austin			123		Address 2		.00			<input checked="" type="checkbox"/>		
<input type="checkbox"/>	08/15/2018 11:42	243003901	Building		02: Shop's Maintenance			Austin			123		Address 2		.00			<input checked="" type="checkbox"/>		
<input type="checkbox"/>	08/15/2018 11:07	242985851	Building		02: Shop's Maintenance			Austin			123		Address 2		.00			<input checked="" type="checkbox"/>		
<input type="checkbox"/>	08/15/2018 11:06	242985129	Building		02: Shop's Maintenance			Austin			123		Address 2		.00			<input checked="" type="checkbox"/>		
<input type="checkbox"/>	08/15/2018 10:52	242982241	Building		02: Shop's Maintenance			Austin			123		Address 2		.00			<input checked="" type="checkbox"/>		
<input type="checkbox"/>	08/14/2018 08:18	242735317	Building	1125 W 400 N, Logan, UT 84321		Dennis Sperry	dsperry@iworq.com				123				.00	08/14/2018	-1	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	08/10/2018 09:10	242323055	Plumbing		05: Yard Recycling	1	Required for e-mail contact	Austin	Cell	Brakes	456		Address 2	High	.00	08/11/2018	0	<input checked="" type="checkbox"/>		