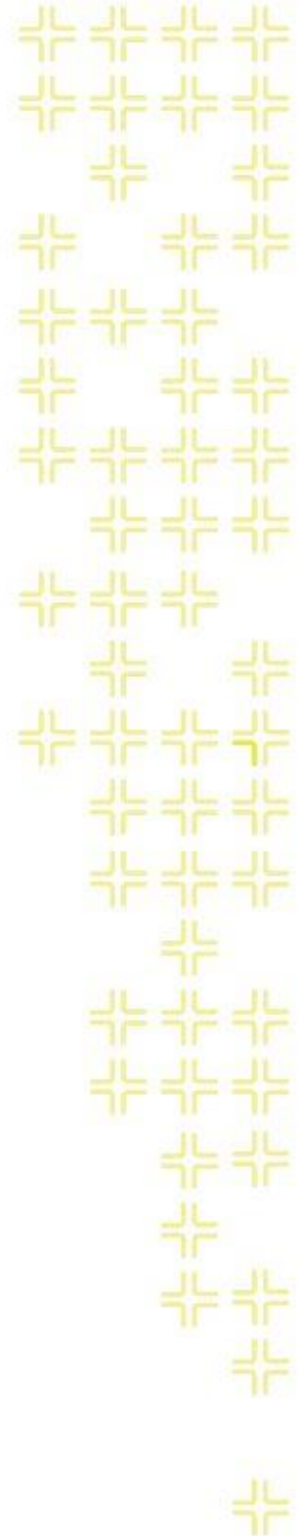




TRAINING GUIDE

# Citizen Feedback Survey



# Configuring Request Feedback

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Request feedback lets you have Lucy send your customers a feedback survey when a request is completed. We provide a default survey format, and a default survey question and answer. The look of the survey and the look of the email that is sent can be customized by someone with javascript and html experience.

## Contents

Required software components installed:.....	2
System Settings Setup.....	2
File Configuration:.....	3
Problem Setup .....	4
Create Request.....	4
Create Work Order From The Request .....	5
View Status Of The Email In Admin Portal.....	5
Reports.....	6
Customizing Look Of The Survey **NOT SHOWING HOW TO DO THIS.....	7
Additional Notes: .....	7
Updating Feedback Files .....	7

## Required software components installed:

- Lucy Web (and its required components)
- Lucy Citizen Portal
- Lucy Citizen Portal RESTAPI (This must be accessible to the server where the Lucy Citizen Portal is installed. We recommend installing on same server as the Lucy Citizen Portal)

## System Settings Setup

- Open Admin Portal
  - Web App Management
    - Client Applications
      - Add Application

The screenshot shows a web form titled "Add New Application". It has a green header bar. Below the header, there are four input fields: "Application Name" with the value "Customer Request Survey", "Application ID" with the value "69eed0e6-cb62-4651-a28f-7e0a5374253b", "Description" with the value "Survey used for Satisfaction Survey in request module", and "Application Scope (e.g. rw:rfb, r:wo)" with the value "rw:rfb". To the right of the Application ID field is a green button labeled "Generate New Application ID". At the bottom left is a red "Cancel" button, and at the bottom right is a green "Save" button.

- Copy the Application ID (Will be needed to update the Feedback.js file)
        - Save
- In Admin Portal Go to Settings
  - System Settings
  - RESTAPI
    - Edit the URL for Citizen Portal REST API
      - Add a "/" to the end of the URL i.g.  
<https://fshell.mylucity.net/LucityCitizenPortalRESTAPI/>
  - Web Site
    - Edit the URL for Citizen Portal application
      - Add a "/" to the end of the URL i.g.  
<https://fshell.mylucity.net/LucityCitizenPortal/>

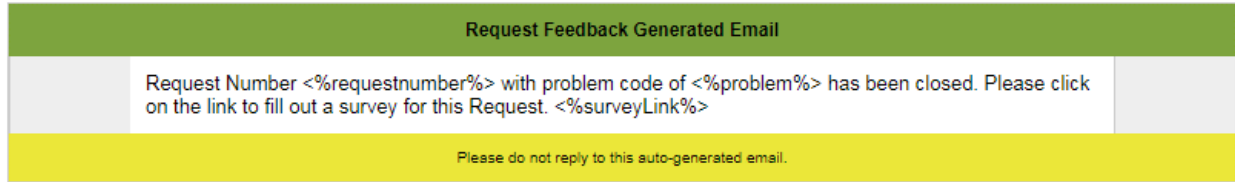
- Citizen
  - Ensure you have the following set to True and values for the Survey:

Setting Description	Setting Value	Setting Category
Citizen checkbox label for remembering requestors information	remember me	Citizen
<b>Enable Requestor Feedback Emails and Responses</b>	<b>TRUE</b>	<b>Citizen</b>
Error to display if a file upload fails in the Citizen app	There was an error uploading the document	Citizen
Instruction label for additional emails	Send this to these additional email addresses (Note: Use semi-colons to separate email addresses):	Citizen
Login ID used for Citizen Website	PublicWebUser	Citizen
<b>Path where Custom Citizen App Files are stored (Citizen Hive)</b>	<b>\\Frankshell\DocShare\CitizenAppFiles</b>	<b>Citizen</b>
Request Feedback Question	Overall, how was the quality of response to your service request or problem call?	Citizen
Request Feedback Responses	"Excellent", "Good", "Fair", "Poor", "Unacceptable", "Issue/Request Unresolved"	Citizen
Show Customer Lookup and Request Lookup buttons on Request forms	TRUE	Citizen
Text to display after a successful feedback submission	Thank you for your feedback!	Citizen
Text to display to citizens if there was a problem and their request could not be submitted	Your response could not be submitted at this time.	Citizen
The current Appld for Lucy Customer Feedback App	07a7a711-1293-4c3d-9a73-97deda25da40	Citizen

### File Configuration:

- Update the Feedback.js file in the following location using Notepad:  
 C:\inetpub\wwwroot\LucyCitizenPortal\Custom\RequestFeedback  
 // You must change the following to your own application ID!  
 this.\$http.defaults.headers.common.APPID = "b0151d46-9fb7-4f75-8e52-63eedc623523";
- Create a Folder in your Document Hive: i.g. CitizenAppFiles
- Copy and paste the RequestFeedback Folder, Citizenemail.html, and FeedbackSurveyEmail.html files from C:\inetpub\wwwroot\LucyCitizenPortal\Custom\
- Navigate to the server where your Document Hive folders are located.
  - Paste the RequestFeedback Folder, Citizenemail.html, and FeedbackSurveyEmail.html files from C:\inetpub\wwwroot\LucyCitizenPortal\Custom\ To the CitizenAppFiles (DocHive) location  
 i.g. C:\Frankshell-It\LucyInstalls\2018R2\DocShare\CitizenAppFiles
- Recycle the Lucy Citizen Portal Application Pool and Restart the Lucy Services

You will need an email that gets sent to customers. We have a template you can use. It is called FeedbackSurveyEmail.html and looks like this:



You can change this email to meet your needs. There are 2 allowable fields which can be inserted into the email. The Request Number and the problem. The problem is a combination of the ProblemCode and ProblemText.

This email (FeedbackSurveyEmail.html) should be copied into the folder defined here:

Login ID used for Citizen Website	PublicWebUser	Citizen
Path where Custom Citizen App Files are stored (Citizen Hive)	\\lct-fs-01\q\Group\btreff\VM175\Lucity\CitizenApplicationCustomFiles	Citizen
	Overall, how was the quality of response to your service request or	

Lucity will automatically copy down any files from the Citizen Hive folder and place them in the Citizen Portal Website for use with the Feedback survey.

## Problem Setup

- Setup specific Work Problems that will send out the Survey.
  - Workflow Setup>> Problem Setup

## Create Request

Either internal or external request will work. Looks at the Problem>> Feedback Survey option

Must have an email address.

## Create Work Order From The Request

Complete the Work Order and email is generated with survey.

May take 5 minutes to generate the email with the survey.

## View Status Of The Email In Admin Portal

Web App Management>> Background Tasks

ID	Description	Status	Status Date
10625	Task to Queue Feedback Survey Email	Queued	9/5/2018 10:51 AM
10624	Task to Queue Feedback Survey Email	Started	9/5/2018 10:14 AM
10623	Clear Client Cache	Finished	9/5/2018 10:14 AM
10622	Task to Queue Feedback Survey Email	Started	9/5/2018 10:14 AM
10621	Restart App	Finished	9/5/2018 10:10 AM
10620	Clear Client Cache	Finished	9/5/2018 10:09 AM
10619	Task to Queue Feedback Survey Email	Started	9/5/2018 10:08 AM
9621	Clear Client Cache	Finished	9/5/2018 9:54 AM
9620	Task to Queue Feedback Survey Email	Started	9/5/2018 9:51 AM

- Email>> Email Queue

Recipients	Subject Line	Queue Status	Status	Status Date	Sent By
fshell@lucity.com	Your Request (#18-000034) has been completed	OK	9/5/2018 9:50 AM		fshell
fshell@lucity.com	Lucity Requestor Feedback Survey Email	OK	9/5/2018 9:52 AM		BackgroundTaskUser
fshell@lucity.com	Your Request (#18-000035) has been completed	OK	9/5/2018 10:05 AM		fshell
fshell@lucity.com	Lucity Requestor Feedback Survey Email	OK	9/5/2018 10:08 AM		BackgroundTaskUser
fshell@lucity.com	Your Request (#18-000036) has been completed	OK	9/5/2018 10:12 AM		fshell
fshell@lucity.com	Your Request (#18-000002) has been completed	OK	9/5/2018 10:15 AM		fshell
fshell@lucity.com	Lucity Requestor Feedback Survey Email	OK	9/5/2018 10:15 AM		BackgroundTaskUser
fshell@lucity.com	Lucity Requestor Feedback Survey Email	OK	9/5/2018 10:15 AM		BackgroundTaskUser

- Once you submit the survey you can't re-use the same survey link.

The request feedback you are attempting to fill out has already been submitted.

- The results will show up as a child of the request

The screenshot shows the Lucity web application interface. At the top, there are navigation tabs for Home, Admin Portal, and Current Year Requests w/Surveys - Water Distribution. Below this is a table of requests with columns for Request #, Status, Category, Problem, Priority, Loc Address, Loc Street Name, Last Request Date, No of Requests, Last Modified By, and Last Modified Date. The selected row is 18-000025, which is a 'WO Completed' request for 'Hydrants' with a 'Vandalism' problem. Below the table, there are tabs for Requestors (1), Comments (0), Tracking (11), Work Orders (1), Requests (0), and Feedback (1). The Feedback (1) tab is active, showing a feedback entry with ID 5612, Results 'Unacceptable', and Comments 'Paint was spilled on my yard after trying to cover the vandalism.' The entry was created by RESTAPILogOn on 09/04/2018 at 2:31:11 PM.

Request #	Status	Category	Problem	Priority	Loc Address	Loc Street Name	Last Request Date	No of Requests	Last Modified By	Last Modified Date
18-000032	WO Completed	Hydrants	Vandalism		10561		09/04/2018	1	fshell	09/05/2018
18-000031	WO Completed	Hydrants	Vandalism		10561	BARKLEY ST	09/04/2018	1	fshell	09/05/2018
18-000030	WO Completed	Hydrants	Vandalism		10561	BARKLEY ST	09/04/2018	1	fshell	09/05/2018
18-000026	WO Completed	Hydrants	Water Theft Report		10561	BARKLEY ST	08/30/2018	1	RESTAPILogOn	09/04/2018
18-000025	WO Completed	Hydrants	Vandalism		10561	BARKLEY ST	09/30/2018	1	fshell	09/05/2018

Feedback ID	Feedback Results	Feedback Comments	Created By	Creation Date Time
5612	Unacceptable	Paint was spilled on my yard after trying to cover the vandalism.	RESTAPILogOn	09/04/2018 2:31:11 PM

- Every requestor on the request can fill out a survey.
- The best way to review aggregated survey results is with a report

## Reports

Request Feedback (Pie Chart with Details) –Date Range

Request Feedback by Work Order Lead Worker–Date Range

Request Feedback by Work Order Lead Worker Summary–Date Range

Request Problem Feedback Received –Date Range

Request Problem Feedback (Bar Graph) No parameter page

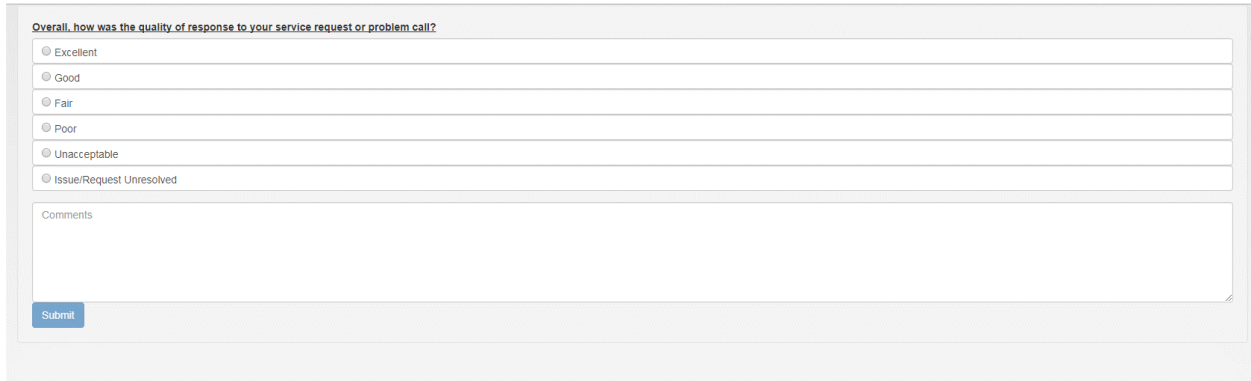
The screenshot shows the 'Reports For Work Requests' interface. At the top, there is a green header with the title 'Reports For Work Requests'. Below this is a dropdown menu for 'All Reports' and a 'Manage Report Groups' button. The main area is a table with two columns: 'Report Name' and 'Report Description'. The table lists several reports, including 'Request Feedback (Pie chart and Details)', 'Request Feedback by Work Order Lead Worker', 'Request Feedback by Work Order Lead Worker Summary', 'Request Problem Feedback (Bar Graph)', and 'Request Problem Feedback Received'. At the bottom, there are buttons for 'Add Quick Report', 'Add', 'Edit', 'Update', 'Download', and 'Delete'. A large red 'Close' button is on the left, and a 'Run' button is on the right.

Report Name	Report Description
feedback	
Request Feedback (Pie chart and Details)	Report shows a Pie chart of Feedback Results and then lists Details of the Request Status date range query.
Request Feedback by Work Order Lead Worker	Report groups by WO Lead Worker and lists the Requests sent for Feedback Selection on Request Status date range query.
Request Feedback by Work Order Lead Worker Summary	Report lists WO Lead Workers with the number of responses per each Request Selection on Request Status date range query.
Request Problem Feedback (Bar Graph)	Report shows Feedback Results in a Bar Graph for the last full month.
Request Problem Feedback Received	Report groups by Problem and lists the Request Feedback responses. Report date range query.

## Customizing Look Of The Survey **\*\*NOT SHOWING HOW TO DO THIS.**

You can change this if you have someone who has HTML and javascript experience.

This is what the user will see by default (you can change this if you have someone who has HTML and javascript experience):



Overall, how was the quality of response to your service request or problem call?

Excellent

Good

Fair

Poor

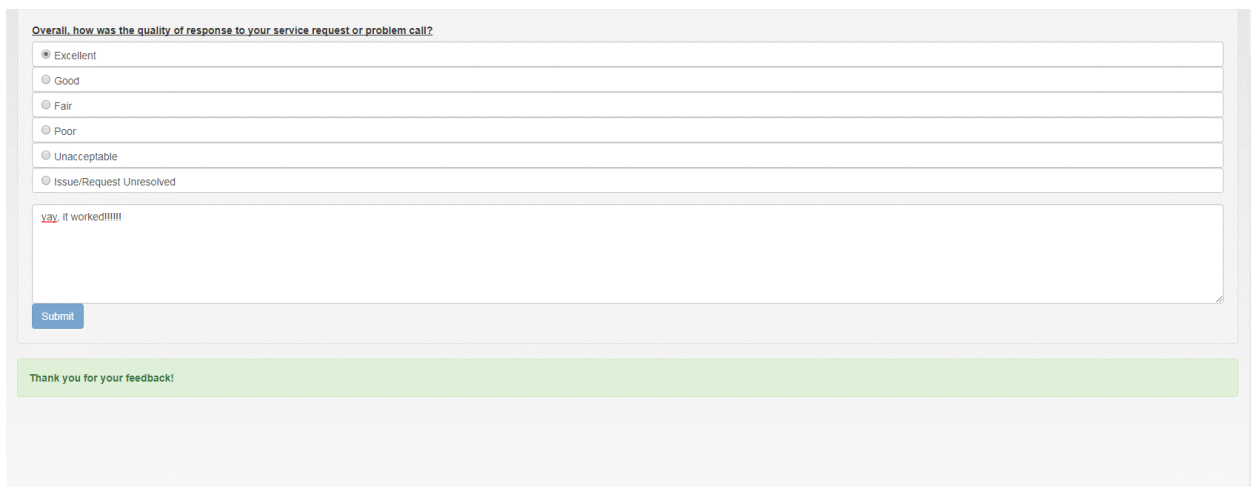
Unacceptable

Issue/Request Unresolved

Comments

Submit

This is what they see once they have entered it



Overall, how was the quality of response to your service request or problem call?

Excellent

Good

Fair

Poor

Unacceptable

Issue/Request Unresolved

yay, it worked!!!!

Submit

Thank you for your feedback!

## Additional Notes:

### Updating Feedback Files

Update the feedback files in the CitizenHive (not in the web directory). If you update the email template, you must restart the Lucity services for the change to be effective. If you update the files in the RequestFeedback folder, these files will automatically be pulled down once a day. To force the update, restart the Citizen Portal application from the Lucity Admin Portal Web App Management>>Tasks.