NYC Open Data Help Desk

Screendoor Onboarding

As of July 2018. Email Adrienne for previous iterations: aschmoeker@analytics.nyc.gov

<u>Summary</u>

Screendoor is a software product of the company The Department of Better Technology. This tool can be found on the Open Data Website (www.nyc.gov/opendata) under "Contact Us" and serves as the way for the public to contact the Open Data Team in a streamlined manner. The use of this tool is to improve the Open Data Team's customer service response time and response quality and to facilitate coordination across agencies to generate responses. In order to submit an inquiry, the public must select from specific drop-down categories to submit an inquiry. Drop-down categories currently include:

1. Request a Dataset
2. Report an error in the data
3. Ask a question about a dataset
4. Suggest a partnership
5. Provide an additional resource for this website
6. Tell us how you use open data
7. Request a training
8. General Inquiry
9. Question for Department of Buildings
10. Taxi and Limousine Commission question

<u>Screendoor usage rates</u>

- The Open Data Team receives ~30 inbound inquiries per week on average
- Breakdown of inquiries by type:
    - 29% - General inquiries
    - 28% - Dataset requests
    - 17% - Data questions
    - 11% - TLC inquiries

<u>Open Data Team Members assigned to triaging inbound inquiries by type</u>

Note All inquiries that come in to Screendoor receive an automated response that the inquiry has been received

1. Request a Dataset - *Aleksandr Finkel and Ogunkeye Hyacinthe*
2. Report an error in the data - *Aleksandr Finkel and Ogunkeye Hyacinthe*
3. Ask a question about a dataset - *Aleksandr Finkel and Ogunkeye Hyacinthe*

4. Suggest a partnership - *Adrienne Schmoeker*
5. Provide an additional resource for this website - *Craig Campbell*
6. Tell us how you use open data - *Adrienne Schmoeker*
7. Request a training - *Adrienne Schmoeker*
8. General Inquiry - *Adrienne Schmoeker*
9. Question for Department of Buildings - *Cindy Nicklin, DOB ODC*
10. Taxi and Limousine Commission question - *Automated response*

Agency Users:

- Department of Buildings
- Department of City Planning
- Department of Education
- Department of Health and Mental Hygiene
- Department of Information Technology and Telecommunications
- Department of Parks and Recreation
- Department of Transportation
- Fire Department
- Independent Budget Office (IBO)
- Taxi & Limousine Commission

Work Flow Overview:

1. Inquiry is submitted via the Open Data website's "Contact Us" page
2. Label is automatically assigned to the inquiry by Screendoor based on the Open Data team member assigned to triage that category of inquiry
3. Screendoor triggers an automatic response to the inquirer that provides them with a copy of their inquiry, a response ID number and a message that they will receive a more detailed message in the coming days.
4. An email is automatically sent to the Open Data Team members' work email address to notify her/him of the newly assigned inquiry
5. The Open Data Team member logs into Screendoor and reviews the inquiry, then conducts any of the following actions:
   a. Responds to the inquiry
   b. Relabels the inquiry based on the inquiry type
   c. Reassigns the inquiry to a different Open Data Team member or an Agency user
6. When an inquirer edits their original submission (ie - responds to a message) their edits will need to be approved. You will receive an automated email when a submission is edited.

Response Time Standards:

Responding to an assigned inquiry:
- Maximum: 14 days (10 business days) from the inquiry submission
- Recommended: 2 business days

Resolving an assigned inquiry: *Understood that this will always depend*
A. Required by Law: 2 months for Dataset Requests
B. Recommended for all inquiries (including dataset requests): 14 days (10 business days)
C. For inquiries set to pending after having responded to the inquirer but awaiting more information:
    a. Close out after 2 weeks of no response

Operational Standards for conducting actions on Screendoor:

Setting Statuses:
- Open - An inquiry should only be in this status if no action has been taken to address the inquiry
- Pending - An inquiry for which action has been taken that requires a response before resolution (ie - you emailed the inquirer or an agency awaiting their response before you can resolve the issue). If an inquiry has been relabeled or reassigned to a different user and still requires action it should be listed as "Pending."
- Closed - You either:
    1. Were able to satisfy the inquirer's inquiry and no further action is required
    2. Sent the inquirer a response with your work email address to continue the conversation as the next step required a meeting

Note: *Key performance metrics around Open Data customer service revolve around response time and time to resolution. Response time is based on the speed with which an inquiry goes from Open status to either Pending or Closed status; speed to resolution is the speed with which an inquiry goes from Open status to Closed status.*
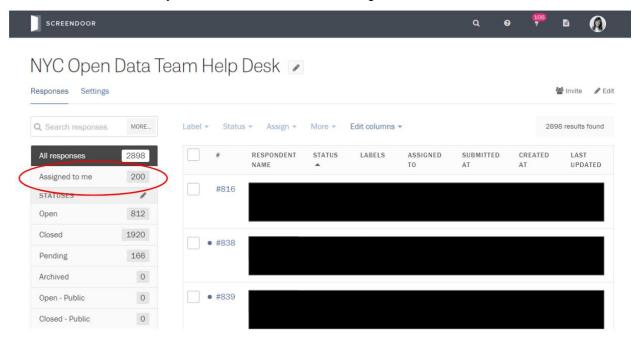
Responding to an inquiry:
Note: *After you respond to an inquiry, for the inquirer to respond to you, s/he must edit her/his original submission (vs their response coming in as a separate inquiry / new message format).*
- All responses to inquiries should be done directly in Screendoor (not in your work email) with the exception of when you are scheduling to meet with the inquirer. Even in this latter scenario you must sent a response via Screendoor that copies your work email address and include your work
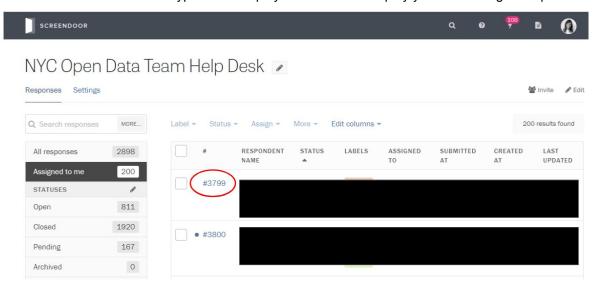
email address in the Screendoor response. Future correspondence may occur via your work email at that stage.

- Steps for responding to an inquiry:
    1. Log in to Screendoor using your login credentials (you will receive an invitation to Screendoor from the Open Data Team upon confirmation that you will be using Screendoor to handle your Open Data public inquiries).
    2. Go to the "NYC Open Data Team Help Desk" project
    3. On the left you will see a bar that states "Assigned to Me"; click there
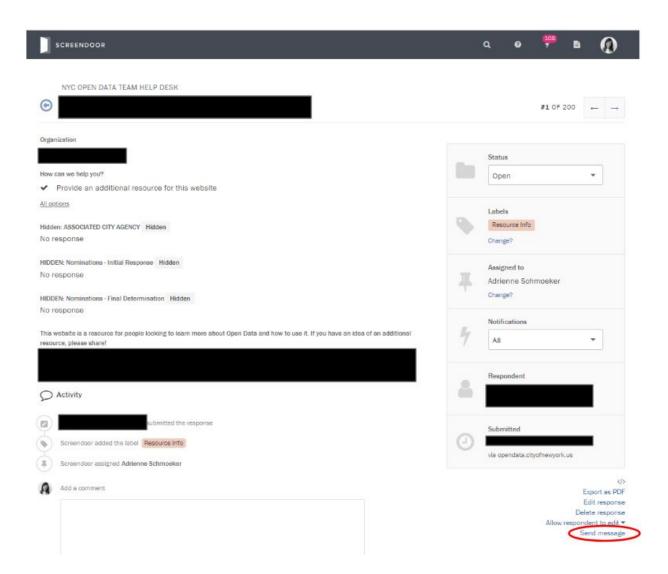
4. Click on the hyperlinked inquiry number of the inquiry you are looking to respond to:
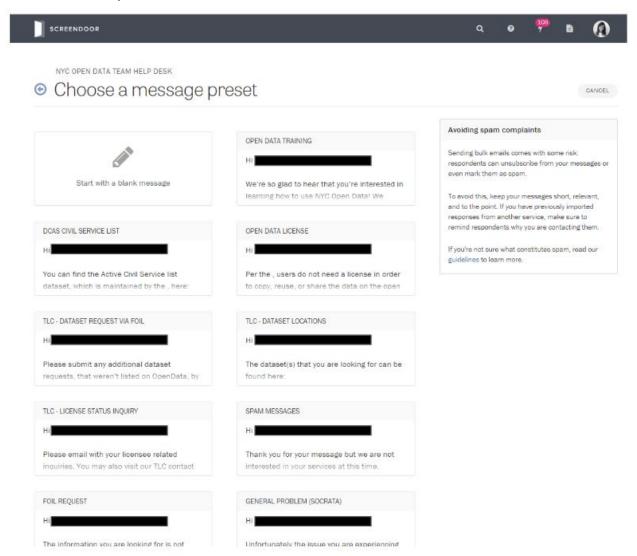
5. Respond to an inquiry by click the 'send message' link at the bottom right page of the inquiry:

6. Either select a preset message of "Start with a Blank Message" to draft a custom response:

7. If drafting a custom response make sure you include the following:
    i. Subject line: Open Data Help Desk - Response ID {{response_id}}
    ii. Put the following do-not-reply email address as the "Reply to" email address: no-reply@data.cityofnewyork.us to ensure the inquirer follows directions to respond by editing her/his original inquiry rather than emailing your work email address (do not include your work email address in your response unless you are scheduling a call or a meeting).
    iii. Signature:
        1. If on the Open Data Team: Best, NYC Open Data

2. If an Agency User: Best, NYC Open Data + <Agency Name>

iv. Add the following copy within the body of the response message to ensure the inquirer is able to submit a response and track her/his inquiry:

> NOTE: To respond to this inquiry you must edit your original submission which you can do here: {{ permalink_to_response }}. For tracking purposes, your inquiry number is: {{ response_id }}

8. If the inquirer responds to your message you will receive an automated email stating that the inquirer has edited their original response and requires your approval.

9. Login to your Screendoor account, approve the edits and respond or close out the inquiry as necessary.

Resetting Inquiry Labels & Assignments:
- If you are assigned to an inquiry that has 2 labels - change the inquiry to just 1 label based on your judgement of the correct inquiry category
- If you are assigned to an inquiry that is also assigned to someone else - change the assignment to the appropriate respondent based on the inquiry and associated label type
- How to change an inquiry label / assignment:
    1. Log in to Screendoor using your login credentials
    2. Go to the "NYC Open Data Team Help Desk" project
    3. On the left you will see a bar that states "Assigned to Me"; click there
    4. Click on the hyperlinked inquiry number of the inquiry you are looking to reassign the label and /or assignment of
    5. Look to the right side of the page to where it says "Labels" or "Assigned"
    6. Click the hyperlinked "Change?" copy beneath the relevant action you are looking to take and reassign the inquiry label and or assignment

Message Presets

There are 19 Open Data Team reviewed and approved Message presets available on the platform. They will appear when you choose to send a message to the inquirer. If you would like to see a preset added or edited please email: *aschmoeker@analytics.nyc.gov*

1. DCAS CIVIL SERVICE LIST
2. OPEN DATA LICENSE
3. TLC DATASETS & APPLICATION STATUS
4. DEPARTMENT OF EDUCATION DATASETS
5. DATASET FOUND
6. INDIVIDUAL RECORD REQUEST

7. ASK FOR ADDITIONAL INFORMATION

8. DATASET NOT FOUND

9. LOGIN PROBLEM (SOCRATA)

10. REFER TO 311

11. FEEDBACK ON GOV SERVICES

12. FORWARD DATASET NOMINATION

13. GENERAL PROBLEM (SOCRATA)

14. FOIL REQUEST

15. SPAM MESSAGES

16. OPEN DATA TRAINING

17. TLC - LICENSE STATUS INQUIRY

18. TLC - DATASET REQUEST VIA FOIL

19. TLC - DATASET LOCATIONS