

Welcome

The ContactUs application sends requests/comments to NCDOT subject matter experts (SMEs). When an SME responds to the comment, the application automatically sends the requestor an e-mail (if provided by requestor). Notification to the requestor via e-mail provides the ability to view the SME's response. If the requestor did not provide an e-mail address, it is up to the requestor to check for the SME's notification by using the assigned tracking number from the ContactUs application.

This application maintains different ContactUs pages that are specific to applications, departments/units and projects. When submitting a request/comment to a specific ContactUs web page, the comment is routed to one or more SMEs for that specific topic. Otherwise, the comment routes to the ContactUs Administrator. The Administrator views the request and forwards it to the appropriate SME or SME group. If an SME reviews the request and cannot provide an appropriate response, the SME can route the request to another SME, SME group or a specific NCDOT employee.

For assistance with logging into ContactUs with your Active Directory password or if you are unsure what your Active Directory password is, please contact the Help Desk.

A troubleshooting page provides commonly asked questions to help resolve certain ContactUs situations.

Help Guide

This ContactUs help guide is broken-down by user roles and functionality:

User Guide: entering and viewing requests/comments

SME User Guide: responding to and searching for requests/comments, and navigating the SME Inbox

Administrator User Guide: responding to and searching for requests/comments, maintaining requests/comments, and maintaining ContactUs users

Please note, throughout this help guide the terms "request" and "comment" are synonymous.



Note: *The ContactUs application is in the process of being upgraded, currently, you are required to login using your Active Directory user name and password to the application. In the future, your credentials will automatically pass to the application so you will not be required to log in to the ContactUs application.*

User Guide

User Guide

The User Help Guide provides information on how to post an request/comment and how to access the information once the SME responds to your request/comment.

Refer to the following topics for tips and tricks and how-to procedures

- Accessing a ContactUs Page
- Posting an Inquiry or Comment
- Viewing the SME Response
- Searching for a Comment

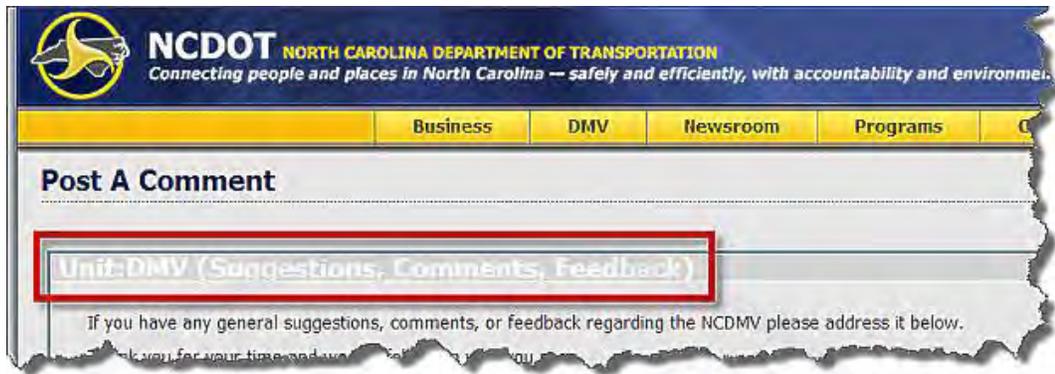
Posting a Comment

You can post a request/comment anonymously, or supply your e-mail address so the SME's (Subject Matter Expert) response automatically triggers an e-mail notification to you to view the response.

SMEs answer inquiries usually within three business days (inquiries/comments sent prior to 5 p.m. on that day count as the first business day). Three business days is usually adequate for a response; but there are times when the SME may have to research information or confer with other SMEs to provide the information you are requesting. In this case, it may take longer than three business days.

Tips and Tricks....

- Make sure the department, project, etc. that appears as the heading is where you want your request submitted. Also, check for link(s) on the web page that may provide the answer to your request/comment.



The links below provide field descriptions that appear on the Post a Comment page.

[Anonymous](#) [Confirmation Page](#) [E-mail](#) [File Attachment](#)
[Name](#) [Phone](#) [Comment Status](#) [Privacy Notice](#)
[Reset Button](#) [Submit Button](#) [View Response](#)

- **Anonymous** - Select the **Set Anonymous** check box, if you do not want to supply any of your personal information. When you select anonymous, you will not receive an e-mail notification. You will be able to access the SME's response by using the comment tracking number. Refer to Viewing Responses for more information.
- **Name** - The first and last name are required fields if you do not submit your request/comment anonymously.
- **Phone** - The phone number field is not required; but providing it gives an SME another way to contact you.
 - Phone number format: 111-123-4567 or 123-4567.
- **Email** - When you enter your e-mail, the ContactUs application automatically sends an e-mail notification when the SME responds to your request/comment.
- **Privacy Notice** - To view details of the ContactUs guidelines and privacy information, select the **Privacy Notice** link.

- Select the **Close**  button in the upper right corner to close this dialog box and return to the ContactUs page.
- **File Attachment** - If the **File Attachment** field displays, you have the option to upload a file and send it to an SME. To upload a file, select the **Browse** button. Locate the file you want to send; and then select the **Open** button.

The full path of the file location appears in the File Attachment field. Once you select the submit button, the file is uploaded in the ContactUs application.



Note: *Anytime a file uploads to the ContactUs application, you or the SME can access the file for 30 days from the date the file was uploaded.*

- **Reset Button** - Select the **Reset** button to clear all fields.
- **Submit Button** - Select the **Submit** button to submit your request/comment.
- **Confirmation Page** - Upon submission, a page appears with an auto generated tracking number and URL to posting, as well as general user information.
 - Select the **Print** button to print the confirmation page for your records.
 - Make sure you retain the tracking number and the URL to your comment for future reference. This information is necessary if you submitted a comment anonymously.



Note: *If you enter your e-mail address, an automatic notification generates and sends you an e-mail when the SME responds to your comment.*

Even though the e-mail contains similar information as the confirmation page, please print the page for your records.



Warning: *If you did not supply an e-mail address, please retain the tracking number and the URL provided on the confirmation page. When checking for the SME's response, you will need the tracking number, or use the URL listed on the confirmation page in order to view responses to your comment. No e-mail notification generates by the application.*

- **View Responses** - Refer to Viewing Responses on how to access and view responses to your comments.
- **Comment Status** - To check the status of a previously posting, refer to Searching Existing Comments.

Viewing a Response

After posting your request/comment, an SME usually responds within three business days. You can access and view the posting and response using the tracking number, URL link supplied to you on the confirmation page or the link provided in the e-mail notification.



Note: *There are times when an SME may have to research information or confer with other SMEs before providing an answer, thus resulting in longer than three business days to response to your request.*

Use the following information to access and view an SME's response

- Your e-mail address (entered in the e-mail field on the posting page). An automatic notification triggers an e-mail to your e-mail address when an SME responds to your comment. Select the tracking number and URL in the e-mail to view the response.
- If you did **not** enter an e-mail address, the application does not send a notification. You must use the tracking number and URL supplied on the

confirmation page - the page that appeared after you submitted your comment. Begin checking three business days after you submitted your comment.

- Refer to Confirmation Page for more information

Tips and Tricks....

E-mail Notification Responses

The following information is only for users who entered an e-mail address on the comment page

- From the automatic e-mail notification, copy the link and paste it in a web browser to view your comment and response.

 **Note:** You can also access your comment and response by entering the tracking number on the Track Comments page. Refer to Searching Existing Comments for more information.

- **Comment History section** - Comment History portion of the page contains the original comment, user information, and the response from the SME. You have an option to respond back to the SME, and print the page.
- **Print** - Select the **Print** link located at the top right corner of the page.
- **Download File Attachments** - Option, select the **Download** link if a file attachment is with the SME's response. This option is not available on all ContactUs pages.

 **Note:** You can access a file attachment for 30 days from the date the file uploads to the posting.

- **Additional Information** - Enter your comments/inquiries in the **Your Response** text box, if you have additional questions or request more information. Select the **Reply** button to submit your additional inquiries.

Anonymous Submissions

The following information is for users who submitted an anonymous request/comment

- Enter the URL (supplied on the Confirmation page) in the web browser's address field.
- OR
- Enter the tracking number on the Contact Us Login page.
 - Refer to the above section for more information on comment history, print, download file attachments and additional information.

Searching for your Comments

You can access a request/comment by entering the tracking number and/or e-mail address (if you submitted a comment using your e-mail address) on the Contact US Login page.

Tips and Tricks

- Use the following URL in the Address field of a web browser to access the Track Comments page: <https://apps.dot.state.nc.us/contactus>
- To search....
 - Enter tracking number in the Tracking Number field. Note, a tracking number appears on the Confirmation page

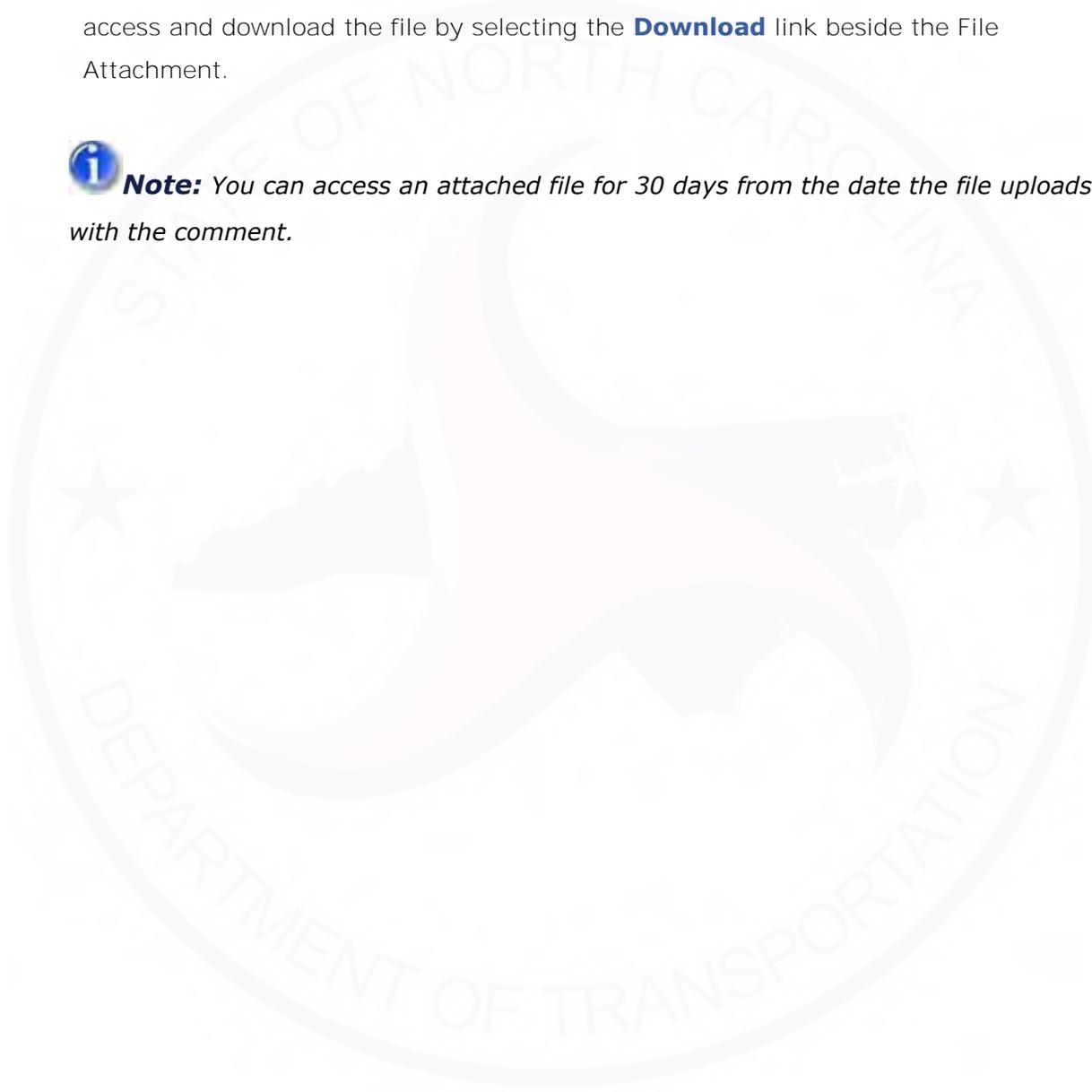
Or

- Enter your e-mail address entered on the comment page. If you submitted your comment anonymously, leave this field blank.

- If you need more information, you can enter another request/comment in the **Your Response** text box.
- **File Download** - If this option is available and the SME attached a file, you can access and download the file by selecting the **Download** link beside the File Attachment.



Note: *You can access an attached file for 30 days from the date the file uploads with the comment.*



SME Guide

SME User Guide

The SME component of ContactUs allows subject matter experts (SMEs) to view and respond to comments submitted to a DOT ContactUs units, subunits, or groups.

Restrictions apply to units and subunits so that an SME receives only the requests/comments that are specific to their area of expertise. ContactUs units/subunits are created and maintained by the ContactUs Administrator or an unit Administrator.

The chart below provides a brief overview on how the roles integrate with each other.



An SME can perform any of the following functions: The links below provide additional information and procedures.

- | | | |
|---|---------------------------------------|--------------------------------------|
| Open Comments | Reply to Comments | Forward a Comment |
| Reply & copy to DOT users | Unassign a Comment | Delete a Comment |
| Attach a File to a Comment | Viewing My History | Search for a Comment |
| View Comment History | Print Comment History | |

Before you begin, you may want to familiarize yourself with the application by reviewing the SME Inbox page. This page provides basic comment overviews, how-to navigate the SME Inbox and the application.

Navigating the Inbox

The SME Inbox allows SMEs to maintain submitted requests for one or more ContactUs units, applications, or projects. The Inbox is the default page for the internal ContactUs application.

Tips and Tricks.....

- The SME Inbox contains all open requests for units, subunits, and groups assigned to a SME or SME group.
- The main Inbox working area provides the option to view open requests or open and replied requests.
 - Note: Assigned requests are only available for viewing by other SMEs, the assigned SME is the only SME that can respond, close or forward an requests/request.
- On the SME Inbox page, a Unit navigation bar is available on the left side of the page. This navigation bar allows an SME to move between units, subunits and groups with ease, if the SME is assigned to multiple units, subunits or groups.
- Access to Inboxes is by user permissions assigned by the ContactUs Administrator or Unit Administrator. Refer to the Administrative User Permissions for more information.
- Definitions for the column headings and fields on the SME Inbox page are available at the bottom of this page.
- Use the search function to locate a request and to view the history of the request.
- SMEs can use the search function to locate open requests/comments.

Inbox Workflow

- A request/comment appears in an SME Inbox upon submission by the requestor.

- Opening a request/comment assigns ownership to the SME. Refer to Opening a request for more information.
 - If the SME reads the request and realizes it should be assigned to another SME, the SME selects the **Unassigned request** button and the request becomes available again for other SMEs within the unit to open and respond. Refer to Unassigning a request for more information.
 - Assignment of a request limits all other SMEs who have access to that Inbox can access to view and/or print the request, they cannot perform any actions (respond, close or forward). Refer to Opening a Request, Viewing Request History and Printing a Request.
- If an unassigned user needs to share information about a request, the unassigned SME can send a message to the assigned SME. Refer to Forwarding a Request for more information.

SME Inbox

To access your assigned SME Inbox, select the **SME Inbox** link located in the upper right corner of the Unit Selection or My History page.

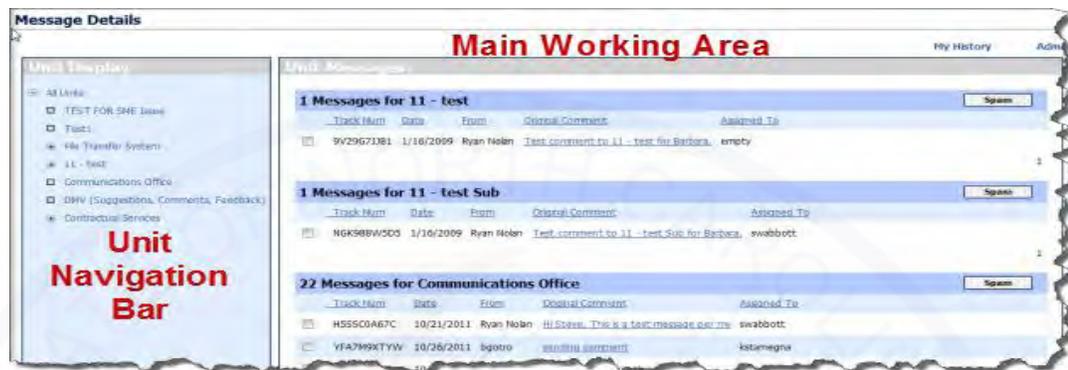


SME Inbox Panes

The SME Inbox page contains two panes: Unit Navigation Bar and Main Working Area. The Unit navigation bar is used to access the units, subunits, or groups assigned to the SME (based on permissions). The main working area displays all open and open/replied requests submitted to the ContactUs unit, subunit, or group.

Note: Upon opening the ContactUs application, all units, subunits, and/or groups assigned to an SME appears in the Main Working Area. To minimize

units, select the **Collapse** button; refer to *Using the Unit Navigation Bar for more information*.



Unit Navigation Bar

The navigation bar contains all the units, subunits, and groups assigned to an SME. An SME cannot view any units, subunits, or groups not assigned to him. Units, subunits, and groups are located on the left side of the page in the blue panel. An SME can also use the Unit navigation bar to view only the unit they select.

To view or hide subunits use the **Expand** (+) or **Collapse** (-) buttons.

To open a selected unit, subunit or group, located the unit and select the **Unit** link.

Main Working Area

The main working area displays open and/or replied requests within each unit, subunit or group that has been assigned to you. To open a request, refer to *Opening a request for more information*.

Inbox Field Definitions

Assigned To - The ContactUs application automatically assigns a request when an SME selects and opens it.

The SME assigned can forward, delete, unassign, or reply to the request. However, other SMEs within the same unit/subunit can open, read, and print the request. If the SME decides s/he cannot respond or provide the required

information, the SME can unassign himself from the request. This allows another SME within the unit/subunit to open, view and respond to the request; at which time, the ContactUs application automatically displays the name of the SME who currently is assigned to the request.

Date - Date when requestor submits the request.

From - Name of the person who submitted the request.

Original request - Displays the first several words of a request. This verbiage automatically becomes a link to open and view the request details on the Information page.

Spam Button - Select the **Spam** button to designate the request as spam. Note, this function has been disabled in the ContactUs application, the button will remain on the page until it is determined that the function should be removed from the application.

Track Num - A unique number automatically generated and assigned to every request upon submission by a requestor. Requestors can use the tracking number as a way to search for their request on the Contact US Login page.

Unit Display - Units, subunits, and groups are located on the left side of the page in the blue panel. Only assigned units, subunits, and groups display in the SME Inbox.

Unit Messages - SMEs have the ability to view requests two ways.

All Open requests - Displays open requests in a table format. Open requests are designated with white and blue-colored rows.

Request Details - Details of a request along with the replies appear in the Request Information or Message Detail page. Replied requests are requests that one or more SMEs have responded to. To view a request, select the request link from the Original Comment column on the Message Details page under the Unit Messages section.

Workflow

When a citizen or NCDOT employee sends an request/comment using the ContactUs application, it is routed to the appropriate SME Inbox. Assignment of the request is automatic upon opening by the SME.

Refer to Open a Request

If the SME reads the request and realizes that the request is for another SME, the SME can select the **Unassign Comment** button. The request is again open and available for another SME user to select and respond. Another option, the SME can forward the request to another ContactUs Unit or DOT employee.

Refer to Unassign a Request Refer to Forward a Request

If a request is opened by a SME, all other SMEs who have access to that unit's Inbox can view and print the request, but cannot perform any other actions to the request.

Refer to Open a Request Refer to Print a Request

If an assigned SME needs information about a request, or an unassigned SME has information about the request, the SME sends a message to the appropriate SME.

Refer to Send a Comment

Once an SME has replied to a request, the request automatically moves from the SME Inbox by the application; the status of the request is closed. If the SME determines the request does not warrant a response, the SME can close the request by selecting the **Delete Comment** button.

Refer to Respond to a Request Refer to Close a Request

Spam feature, this feature is not functional in the ContactUs application, the Spam button and link remains in the application until it is determined that this function should be removed.

Maintain Comments

Maintain Comments

SMEs can search, open and reply to requests using the View/Edit comments feature.

To review the states of a comment, refer to Status of Comments for definitions.

Select a topic for how-to instructions and additional information:

Attach a file to a Comment	Carbon copy your response to another DOT user	Close a Comment	Delete a Comment
Download a file from a Comment	Forward a Comment	Not ready to respond, how do you exit the comment	Open a Comment
Print a Comment	Respond to a Comment	Search for a Comment	Send comment to an assigned SME
Unassign a Comment	View the History of a Comment		

Status of Comments

The ContactUs application changes the comment's status as it is routed by the SME or Administrator in the application. The status of a comment is not always visible on the pages within the application, but an Administrator can manually change the status of a request. Administrators can change a comment's status to open, closed, deleted, or unassigned.

Unassigned

- Unassigned requests are un-open submitted requests.
- SMEs and Administrators can unassign a request once the request is opened.
- Unassigned requests appear in the SME Inbox with the Assigned To field blank.
- If two or more SMEs share an Inbox, and one SME opens a request but cannot respond to it; the SME must elect to unassign the request before another SME can respond.
 - Once unassigned, the request appears again in the Inbox as open with no SME assigned.
 - When another SME opens the request and responds, the first SME who unassigned the request can now view the request but cannot respond to it.

Open

- Open requests are requests that have been opened by a SME but has not provided a response.
- Administrators can change the status of a request to open if it is closed, deleted, or unassigned.
- If the requestor replies back to the SME after the SME has responded to the original request, the request appears again in the SME Inbox as open.

Replied

- Replied requests are requests that a SME or Administrator has responded to.
- When a SME replies to a request, the status of the request becomes closed.
- A replied request is viewable and printable.
 - Use the search function
 - Locate the request under My History if the request is less than 60 days old

Closed

- When an SME replies to a request, the ContactUs application automatically changes the status to closed.
- When a request is marked closed, SMEs cannot reply, forward, or change the status.
- Administrators can manually change the status of a request.

Deleted

- Deleted requests are requests selected by an SME to remove from the SME Inbox.
- SMEs or Administrators can select the Delete Comment button to delete a comment from the SME Inbox.
- A deleted request is viewable and printable.
 - Use the search function

Open a Comment

SMEs can view open requests from the SME Inbox page (based on your user permissions).

Tips and Tricks

- Open requests are requests in a SME Inbox and open (view) by a SME
- If, two or more SMEs share an Inbox, whoever opens the request is assigned
- The assigned SME can respond, print, forward, unassign, close and delete the request
- Unassign a request marks the request available for another SME (within the same group) to open and respond
- Other SMEs can view and print the request or contact the assigned SME via e-mail
- Upon sending a reply, the status of the comment is closed
- The assigned SME can perform the same actions to a closed request as an open comment
 - Locate and select the comment under My History page (if the request is less than 60 days old)
 - Use the search function

How-To Open a comment

- SME Inbox page
 - Select the **Link** for the request you want to open and view
- Comment Information page
 - View the request
 - Refer to the following topics to perform an action
 - Forward a comment
 - Respond to a comment
 - Attach a File
 - Close a comment
 - Delete a comment
 - Unassign a comment

If You Are Not Ready to Respond

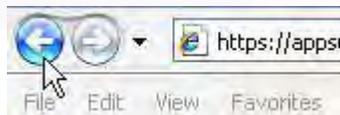
If you want to close the page without responding, you have three options. Be aware, that your name will appear in the Assigned To column for the request. Once you open (to view) a comment, you are automatically assigned to comment. To remove yourself, you must unassign the comment.

How-To Not Respond to a Comment

- Select one of the following options to exit the Comment Information page without sending a response
 - Select the **Unit Selection** breadcrumb above the Message Details title on the page. The SME InBox page appears.



- Select the **Web Browser Back** button. The SME InBox page appears.



- Select the **Logout** link in the task bar. If you select this option, you must log in to the application again.



Unassign a Comment

If you do not want to be the assigned SME for a request, you can unassign yourself.

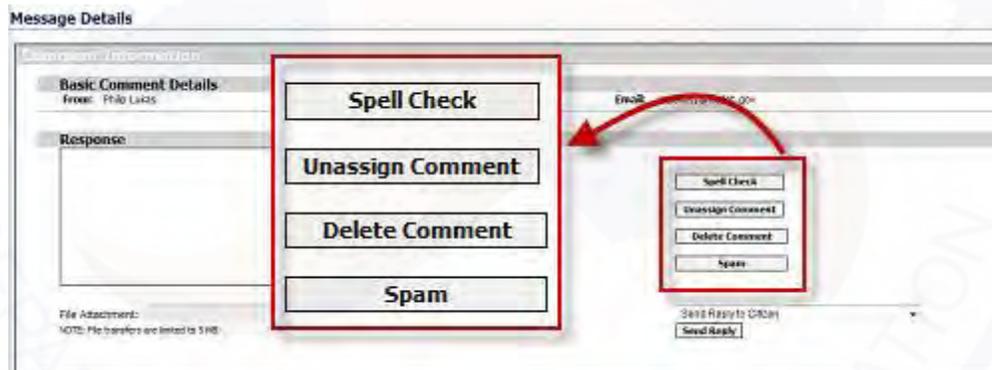
Tips and Tricks

- You can unassign a comment if it is assign to you and it is open or closed

- You cannot unassign a request if the request has been deleted, or forwarded to a unit in which you do not have access
- Unassign a request if you open and read the request, then realize that you are not the best person to reply
- Unassign a request, allows another SME within the same unit to open and respond
- If you delete a request, only an Administrator can unassign a request and change the status of the request to open, refer to the Administrative Guide for more information

How-To Unassign Yourself from a Comment

- SME Inbox page
 - Select the **Link** for the request you want to open
- Message Details page
 - Select the **Unassign Comment** button



Responding to a Comment

Responding or replying to a comment is one of the most common tasks performed within the ContactUs application.

Tips and Tricks

- Only the assigned SME can reply back to the requestor.
- If the requestor included their e-mail with the comment, the application automatically sends an e-mail notification when the SME responds.

- If the requestor submitted the comment anonymously, the response is on the ContactUs server and the requestor must use the comment's tracking number to view the response.
- Other SMEs who have permission to view the Inbox can open and view the comment but cannot respond directly to the requestor. These SMEs can respond to the assigned SME via e-mail, if necessary.
- The ContactUs application records all information (actions and communication) for every comment and this information displays in the Comment History section of the comment. This allows multiple SMEs to work on a request and familiarize themselves with the history of the issue.

How-To Respond to a Comment

- SME Inbox page
 - Select the **Link** for the request you want to open
- Comment Information page
 - Enter your **Response** in the Response field
 - If you have the ability and want to attach a file, refer to Attaching a File for more information
 - Select **Send Reply to Citizen** from drop-down list (default selection)
 - Select **Send Reply** button

Carbon Copying a Response

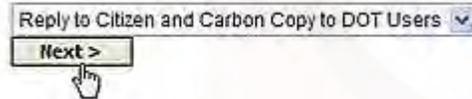
You can carbon copy your response to one or more NCDOT users when you respond to a requestor's comment, allowing other DOT users to receive and view your response.

Tips and Tricks

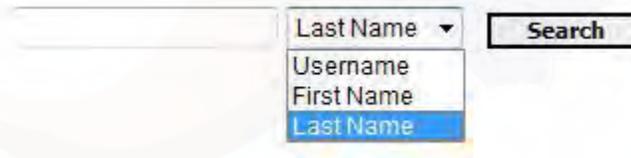
- Use the Carbon Copy function to include other DOT employees who are not an SME for your Inbox to receive and view a response sent to a requestor
- Use the **Back** button on the Message Details page to return-back to the initial Message Details page

How-To Carbon Copy

- SME Inbox page
 - Select the **Link** for the request you want to open
- Comment Information page
 - Enter your **Response** in the Response field; note, this is a required field
 - If you have the ability and want to attach a file, refer to Attaching a File for more information
 - Select the **Reply to Citizen and Carbon Copy to DOT Users** option from the drop-down list
 - Note, page refreshes before the Next button appears
 - Select the **Next** button



- Response section - Message Details page
 - Search for NCDOT employee
 - Enter the employee's first name, last name or user name



- Select a **Search** option that matches your search entry, Username, First Name or Last Name
- Select the **Search** button, employees names appears in the Search Results list.
- Select the **NCDOT employee(s)** you want to carbon copy from the list

The screenshot shows a web interface for searching and adding employees. At the top, there is a search bar with the text 'smith' and a dropdown menu set to 'Last Name'. A 'Search' button is to the right. Below the search bar, there are two main sections: 'Search Results List' and 'Add List'. The 'Search Results List' contains a scrollable list of names: Smith, William A.; Smith, Andy M.; Smith, Anita T.; Smith, Ann J.; Anthony C. Smith; Smith, Archie L.; Arkavia D. Smith; Smith, Arthur L.; Smith, Artis; Ashley N. Smith; and Barry F. Smith. To the right of this list are two arrows: a green 'Add' arrow pointing right and a red 'Remove' arrow pointing left. The 'Add List' box contains the names 'Al Smith' and 'Smith, Anthony R.'. At the bottom of the interface, there are two buttons: '< Back' and 'Send Reply'.

- Select the **Add** arrow to move the names to the Add List box
- Select the **Send Reply** button, to send to the requestor and the selected NCDOT employee(s)

Forwarding a Comment

You can forward a comment to another unit, subunit, group, or another DOT employee by using the forward feature.

Tips and Tricks

- Use the forwarding feature when a comment has been submitted to the wrong unit, subunit, or group
- Use the forwarding feature if an employee plans to be out of the office (vacation, sick leave, etc.) and wants to reassign his comments to another SME in another unit. Thus, allowing a response in a timely manner.
- Use the forwarding feature to send the comment to a NCDOT employee who is not set up in the ContactUs application but understands, has knowledge of the request and can best answer it
- When you forward a comment to a ContactUs unit, any SME assigned to that unit, subunit or group can reply to the comment.
- Use the **Back** button to return to the previous page, if you are not ready to forward the comment or you want to add information to your response

How-To Forward a Comment

- SME Inbox page
 - Select the **Link** for the request you want to open
- Comment Information page
 - Enter your **Response** in the Response field
 - If you have the ability and want to attach a file, refer to Attaching a File.
 - Select forwarding type:
 - Forward to Another ContactUs Unit
 - Select **Forward to Another Contact Us Unit** from drop-down list
 - Select **Next** button
 - Select the **Unit** to forward the comment to
 - Note:** To select a subunit, select the **Expand** (+) icon next to the unit to display subunits
 - Note:** The Unit Name(s) appears at the bottom of the page next to the Forward button
 - Select **Forward** button
 - Note:** The ContactUs application records forwarding information in the Comment History section of the comment. To view this information, refer to Viewing Comment Details
 - Forward to a NCDOT Employee
 - Select **Forward to a DOT Employee** from drop-down list
 - Select **Next** button
 - Search for a DOT employee using their user name or last name
 - Note:** If you search by the employee's last name, you may have to select the employee from the Forward To drop-down list if multiple names appear
 - Select **Forward** button

Send a Comment to the Assigned SME

When you access a comment assigned to another SME, you are provided with an e-mail link on the Comment Information page. You can send or request information from the assigned SME via their e-mail.

How-To Send Information to an Assigned SME

- SME Inbox page
 - Select the **Link** for the request you want to open
- Comment Information page
 - Select the **SME Name** link to open an e-mail message using your default e-mail application



4. Enter the necessary information regarding the comment
5. Select the **Send** button

Attach a File to a Comment

The ability to receive or send file attachments with a comment is an option granted by an Administrator using the Administrative Guide.

Tips and Tricks

- If the File Attachment field does not appear on the Comment Information page, the Administrator has not designated the unit, subunit, or group to send or receive file attachments.
- Attached files are available for download for 30 days from the date the file uploads. After 30 days, the file is removed from the ContactUs database and the file name remains in the Comment History of the comment.

How-To Attach a File

- SME Inbox

- Select the **Link** for the request you want to open
- Comment Information page
 - Select the **Browse** button to locate the file
 - Note, the File Attachment field, and Browse button are located under the Response box



- Choose File to Upload dialog box
 - Locate and select the **File** to upload
 - Select the **Open** button
- Comment Information page
 - Send the request; refer to one of the procedures below
 - Send request to requestor only - refer to Respond to a Comment
 - Send request to requestor and carbon copy -refer to Carbon Copy Response
 - Forward the request to another ContactUs unit - refer to Forward a Comment
 - Forward the request to a DOT employee - refer to Forward a Comment

Download a File

Some ContactUs units, subunits, or groups allow sending and receiving file attachments to comments. The ContactUs or Unit Administrator defines this feature.

Tips and Tricks

- If the File Attachment field does not appear on the Comment Information page, the Administrator has not designated the unit, subunit, or group to send or receive file attachments.
- Attached files are available for download for 30 days from the date the file uploads. After 30 days the file is removed from the ContactUs database and the file name remains in the Comment History of the comment.

How-To Download a File

SME Inbox

.....Select the **Link** for the request you want to open

Comment Information page

- Find the file attachment that you want to view
- Select the **Download** link

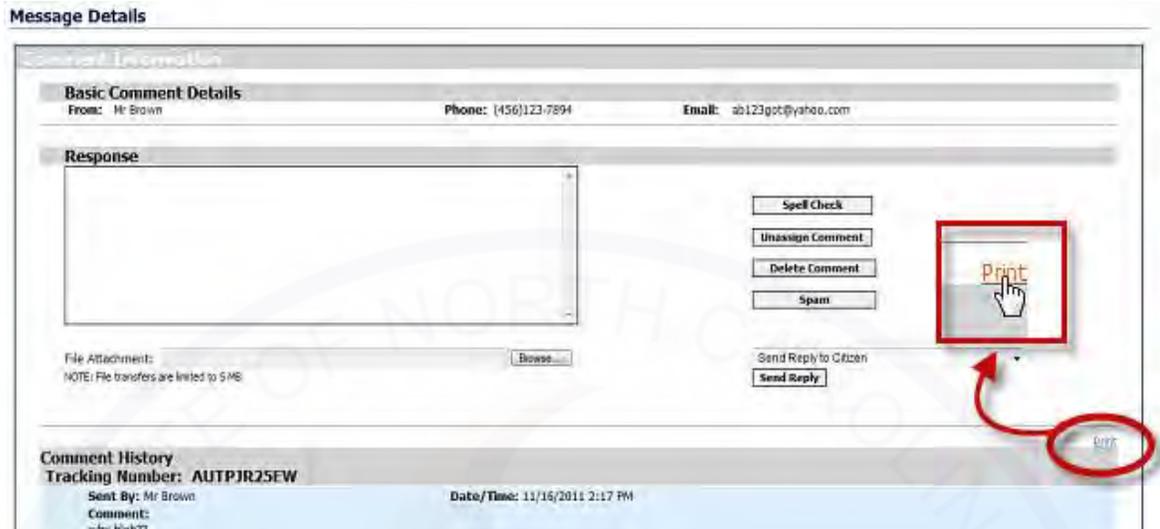


- File Download Dialog box
 - Select the **Open** button to view the file
 - Select the **Save** button to save the file to a specified location
 - Select the **Cancel** to abort the process and return to the Comment Information page

Print a Comment

You can print the history of an open, replied or closed comment using the print feature.

Select the **Print** link that appears to the right of the Comment History banner.



Closing a Comment

In the ContactUs application, if you close a comment, you are "deleting" the comment from your SME Inbox.

Tips and Tricks

- Close a comment at any stage of the comment cycle (unless it is deleted, assigned to another SME user, or has been forwarded to a unit or DOT employee).
- You can access, view and print a closed/deleted comment; however, you cannot perform any of the actions you are able to with an open comment.
- You can reopen the comment by contacting the ContactUs Administrator (Web Services) or Unit Administrator via the ContactUs application. Only administrators can change the status of a comment.
- A comment automatically closes when the SME responds to the request.
- If you close a comment in which you have already responded to, the comment will be accessible only from the Search Comments feature.

How-To Close a Comment

- SME Inbox page
 - Select the **Link** for the request you want to open

- Comment Information page
 - Select the **Delete Comment** button
 - The comment should not appear on the SME Inbox page

Delete a Comment

To remove a comment from appearing in the SME Inbox, you can delete a comment. When you delete a comment, the comment is never deleted from the database; it is just removed from view. You have the ability to search and view the comment using the search function.

Tips and Tricks

- There are situations when to delete a comment. For example, if a requestor submitted a comment, then decided to call the SME instead; the SME can remove the comment if the situation was resolved over the phone.
- Delete a comment when the SME can no longer access the deleted comment from the SME Inbox; however, the comment is viewable using the Search Comments feature in the Administrative component.
- Closing a comment is the same as deleting a comment.
- Only the assigned SME can delete a comment from the SME Inbox.
- To delete a comment, the comment must reside in a SME Inbox you have permission to access and the comment must be assigned to you.

How-To Delete a Comment

- SME Inbox page
 - Select the **Link** for the request you want to open
- Comment Information page
 - Select the **Delete Comment** button
 - The comment should not appear on the SME Inbox page

My History

Each comment within the ContactUs application contains a Comment History section. This section displays all the communication and actions associated with a comment.

Tips and Tricks....

- The Comment History section allows SMEs or Administrators to view the history and issues of a comment in chronicle order.
- The My History log displays only the last 60 days of requests.
- Use the search function to locate requests that are older than 60 days.
- If you receive the following message: "You are not allowed to view message details in this unit"
 - This means you do not have the authorization to view the details of the comment. For information about the comment, contact the person identified in the brackets of the Comment Text.



How-To View My History

- SME Inbox page
 - Select the **My History** link



- My History page
 - Select a **Unit** from the drop-down list
 - Note:** As an SME, only the units assigned to you are available for selection
 - Select the **Comment** link to view a comment

<u>Your Comment</u>	<u>Status</u>
tas Comment deleted by [PIO] (bgautreaux)	Closed
<u>test</u>	Closed

- Message Details page
 - Select the **Print** link if you want to print the history



Comment Search

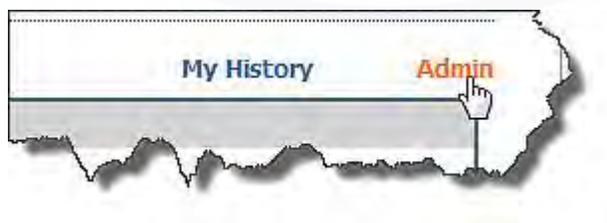
At any time, you would like to locate a comment, use the search function of the ContactUs application.

Tips and Tricks

- When you use the tracking number to search for a comment, you do not have to select a unit. The ContactUs application automatically searches all units/subunits in the database for the tracking number
- When searching by any other criteria, other than the tracking number, at least one field must have criteria.
- If you enter a begin date, you should enter an end date and vice versa

How-To Search for a Comment

- SME Inbox page
 - Select the **Admin** link



- Unit Selection page

- Select **Search Comments** button
- Search/Edit Comments page
 - Enter **Search Criteria** in at least one field - refer to the search criteria field definitions for more information
 - Tracking Number - if you entered a tracking number, you are not required to select a unit, subunit, or group
 - Dates - if you enter a begin date you should enter an end date or vice versa
 - Select a **Unit, Subunit, or Group** check box to specify the unit, subunit, group or **Select All** checkbox to search all units/subunits assigned to you
 - Select **Search** button
 - If multiple comments appear on search/Edit Comments page
 - Locate comment you want to view
 - Select the **Tracking Number** to view the comment details and history
 - Select the **Print** link to print the details of the comment



Field Definitions

Tracking Number - A unique number that auto-generates by the application upon submission. Use the Tracking numbers to search and view a specific comment/request. Users who submit comments use the tracking number to search for replies.

Begin Date - The date when to begin the search. Select the calendar button to display a calendar.

End Date - The date when to end the search. Select the calendar button to display a calendar.

Comment - A word or phrase that appears in the comment.

Email - The requestor's e-mail address.

From - The name of the requestor; or, the person who checks the Anonymous checkbox.

Search Messages Forwarded to Other Units Only Checkbox - Select this checkbox to search for only forwarded messages. Once checked, the page refreshes and limits the search results even further.

View Comment Details

Details of comment are viewable at any stage of the comment's life cycle. If the comment is open, it is on the SME Inbox page and viewable by selecting the comment link. Use the search function to locate comments with the status of close or delete.

Tips and Tricks

Background color definition

White background [Replies]

Replies or responses submitted by the SME to the requestor

Blue background [Submissions]

Comments submitted by the requestor

Comments include the original comment submitted by the requestor as well as any additional comments submitted by the requestor

If the requestor replies back to an SME, this reply appears with a blue background

Red background [Actions]

Any administrative or SME action taken on behalf of a comment, such as forwarding or changing the status of the comment



Note: If a unit, subunit or group page allows file attachments, then the file attachment appears in the appropriate color background (depending upon who sent the file attachment).

How-To View Details of a Comment

- SME Inbox page

- Select the **Link** for the request you want to open
- Comment Information page
- History of the comment appears below the Response section

View Comment History

Each comment within the ContactUs application contains a Comment History section which records all communication and actions associated with the comment. It also provides SMEs and Administrators with the ability to track actions taken for the comment, such as forwarding a comment, or changing the status.

Tips and Tricks

- Before you can view a comment, use the Search function to locate the comment
- The Comment History allows SMEs and Administrators to view the history and actions for a specific comment
- SMEs and Administrators who have access to the unit, subunit, or group can view the comment's history log
- If the comment has not been closed or deleted, a SME can view the history from the SME Inbox
- The comment order displayed in the history log is from the most recent comment and descends by date
- The Comment History contains three comment types
 - Replies** - Replies or responses made by an SME to the requestor appears with a **white** background.
 - Submissions** - Submissions are requests/comments submitted by the requestor appears with a **blue** background. Submissions include the original comment plus any additional comments submitted by the requestor.
 - Actions** - Actions are Administrative or SME actions taken on behalf of the comment, such as forwarding or changing the status of the comment. These actions appear with a **red** background.
- File Attachment - If a ContactUs page allows file attachments, the File Attachment section appears. Refer to Downloading Files in a Comment, or Attaching a file for more information.

How-To View the History of a Comment

- From SME Inbox page
 - Select the **Link** for the request you want to open
- Comment Information page
 - The Comment History appears below the Response section of the comment
- From Admin link on SME Inbox page

- Select the **Admin** link



- Unit Selection page
 - Select the **Search Comments** button
 - Enter **Search Criteria** in at least one field, refer to Searching Comments for more information
 - Select the **Units** you want search; if you entered a tracking number, you do not have to select a unit
 - Select the **Search** button
 - Select the **Tracking Number** to view the comment details and history

Administrative Guide

Administrative Guide

The Administrative component gives administrators the ability to manage units, subunits, groups, comments and users within the ContactUs application. The Administrator guide provides how-to instructions and tips on navigational tools, user permissions, and hierarchical structure of units, subunits, and groups.

By structuring units, Administrators can classify comments into specific areas within an application or group. For example, an application has two different components, the Administrator creates a main unit for general questions regarding the application; then create subunits for the different components within the application. Separate subunits ensures comments for a specific area is sent to the correct SME, speeds up response time, and reduces human error by eliminating the need to forward requests to the appropriate SMEs.

The chart below provides a brief overview on how the roles integrate with each other.



An Administrator can perform any of the following functions: The links below provide additional information and procedures.

Create Units/Groups	Create Subunits	Edit Units/Subunits/Groups
-------------------------------------	---------------------------------	--

Move Units/Subunits/Groups	Delete Units/Subunits/Groups	Edit a Comment
Search for a Comment	Retrieve a Deleted Comment	User Permissions
Assign a User to a Role	Delete User from a Role	Reports

Maintain Users

SME (User) Lookup

Use the User Lookup feature to find a SME and display all ContactUs units assign to the SME. The results appear on the page in a table format.

Tips and Tricks

- The user lookup only displays SMEs assigned to units, subunits or groups
- Administrators who are assigned as SMEs to units, subunits and groups will appear in the table
- The Administrator role will not appear in user lookup table
- If an Administrator is not listed as an SME, their name will not appear when searched

How-To Lookup a User

- Unit Selection page
- Select the **User Lookup** button
- User Search page
- Enter the **User Name, Last** or **First Name** of the SME
- Select a **Search Type** from the drop-down list

Note, the search type must match the name type entered

- Select the **Search** button

Note, if multiple names are found in the database, select a name from the Select drop-down list

The table populates

- Select the **Unit Selection** breadcrumb to return to the Admin page

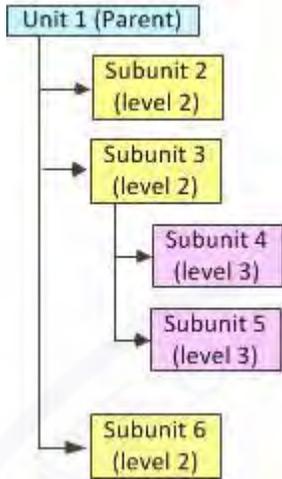


Role Permissions

The roles and permissions are used to grant or deny access to units, subunits, groups and the SME and Administrative components of the application.

Tips and Tricks

- SMEs (Subject Matter Experts) do not have access to the entire Administrative component - only Comment Search
- Unit Administrators and SMEs have access to units, subunits, or groups that they are assign
- If a SME is removed from a parent unit (level 1), the SME will not have access to the subunits under the parent unit
 - However, manually adding the SME to the subunit of a parent is allowable
- When creating a subunit, SMEs assigned to the parent unit, automatically become Administrators of the subunits
 - These Administrators (SMEs) do not appear in the list of SMEs for the subunit unless manual entry is used to add them
 - Administrators over an unit or subunit and are not assigned as an SME to the unit or subunit, can only view the requests in the SME Inbox, they cannot respond to the request
- Permissions
 - Assigning a SME to a parent unit, the SME has Administrative abilities for that unit and subunit. Note, a parent unit can contain one or more subunits and a subunit can be a parent if subunits are under it



- If an SME is assigned to the main unit (**Unit 1**), the SME has administrative capabilities for all subunits - levels 2 and 3
- If an SME is assigned to a subunit (**Subunit 3**), the SME does not have administrative capabilities for subunit 3; but the SME has administrative capabilities over level 3 subunits (Subunit 4 and Subunit 5)

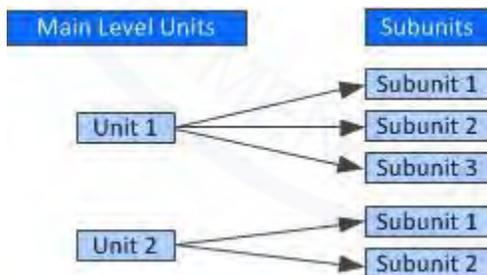
Roles

Key:

- **BLUE** indicates an Administrator and/or SME who has permissions for the unit(s) and subunit(s)
- **YELLOW** indicates an SME who has access to the unit(s) and subunit(s)
- **GRAY** indicates an Administrator and/or SME who does not have access to unit(s) and subunit(s)

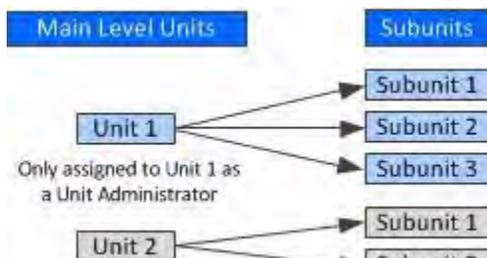
Note: The charts display only two levels of a parent and subunits; however, users who have permissions in the main (level 1) unit will have permissions in all subunit levels

ContactUs Administrators (Super)



- This role has access to all units and subunits within the ContactUs application (the main or level 1 unit and below level 1)
- ContactUs Administrators are not automatically assigned as an SME to every unit and subunit; but only as the default SME has been assigned to the unit or subunit), or manually entered as an SME

Unit Administrators



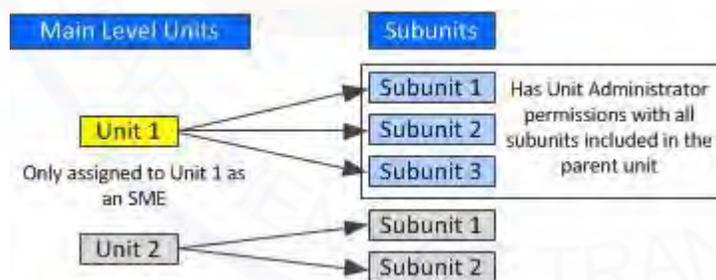
- This role has access to only the unit(s) and subunit(s) assigned by the ContactUs Administrator

- If a Unit Administrator is assigned to a parent unit, subunits under the parent unit are accessible to the Administrator
- Unit Administrators can assign SMEs to their assigned subunits
- Unit Administrators are not required to be listed as a unit and/or subunit; they can be manually added and/or subunit - because a SME has not been defined

Note: This role has authority over any parent unit and subunits because assigning the Unit Administrator to the parent unit (designated as BLUE). In the example above, Unit 2 is not assigned to the Unit Administrator; therefore, the Unit Administrator does not have access over the unit or subunits (designated as GRAY).

SME (Subject Matter Expert)

- This role has access only to units/subunits in which they have been assigned by Unit or ContractUs Administrators
- SMEs who have administrative capabilities over subunits may not be listed as an SME, unless the SME is added as an SME
- When an SME is assigned to a main unit, the SME has access to the unit but not necessarily the subunits.
- The SME has the ability to



see/access only unit(s) and/or subunit(s) s/he assign. However, when a subunit is added, the SME has administrative capabilities to all subunits within her/his assigned main unit.

Note: *In the example above, the SME is not assign to Unit 2, so the SME does not have access to the parent or subunits of Unit 2 (designated as GRAY).*

Adding and Removing SMEs and Administrators

Administrators can add or remove SMEs from units and subunits. ContactUs Administrators can make changes to any units or subunits; while Unit Administrators can only make changes to the units and subunits, they are assigned.

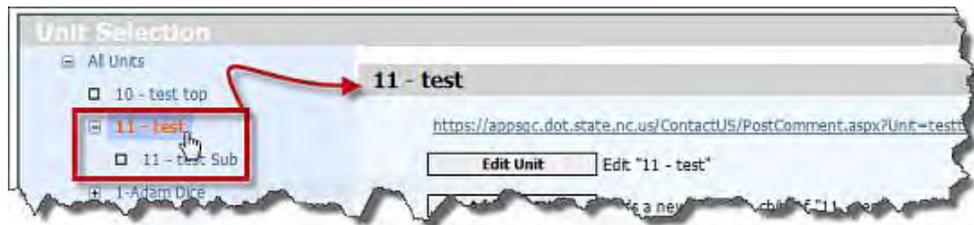
Tips and Tricks

- Add Unit Administrators only if they are current SMEs for the unit
- Subunits are not required to have ContactUs or Unit Administrators assigned because they are in the parent unit
 - All SMEs within the parent unit are automatically Unit Administrators for the subunits of the parent unit
- When creating subunits, all SMEs within the Current SME list will have Unit Administrator capabilities over the parent's subunits
- When removing a SME from the parent unit, the SME is automatically remove from all subunits
 - If the SME is to remain over one or more of the subunits, the SME must added to each subunit
- In order to add an Unit Administrator to a selected unit, the Unit Administrator must be an SME in the current unit
- SMEs of parent units are automatically assign to subunits

How-To Add or Remove SMEs from an Assigned Unit

- Unit Selection page

- Locate and select the unit you want to add or remove SME users



- Verify that the Unit you selected appears in the banner, above the buttons
- Select the **Add/Remove SME** button
- Add/Remove SME page
 - Add SME
 - Enter the **User Name, First** or **Last Name** of the SME in the Search field
 - Select the **Search** button
 - Select by highlighting the name in the Search Results list
 - Select the **Add** arrow button
 - Remove SME
 - Select by highlighting the **SME Name** in the Current Users list
 - Select the **Remove** arrow button

Note: Selection of the **Remove** button does not display any notification

Maintain Units and Subunits

Unit Menu - Navigation Bar

This page provides details of the hierarchical structure for units and subunits within the ContactUs application.

Tips and Tricks

- The Unit Selection navigation bar allows Administrators to access and edit unit details, as well as create units and subunits

- Within the Unit Selection navigation bar, Unit Administrators can view the units and subunits in which they have administrative privileges
- Accessing to view Units and Subunits
 - Use the **Expand** (+) button or the **Collapse** (-) button to perform the following actions:
 - Select the **Expand** button to display subunits under a parent unit
 - Select the **Collapse** button to hide subunits under a parent unit
 - Select the unit or subunit link to view edit options

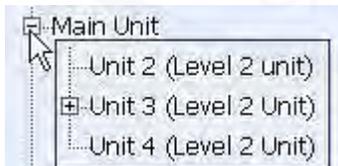


- There is no limit to the number of subunit levels created under a parent unit
- User permissions are based on unit levels, refer to Understanding User Permissions in Units for more information
- When creating a unit or subunit, the ContactUs application automatically creates a ContactUs page and requires the Administrator to enter the URL path
 - The URL path displays the ContactUs page for a unit, or group
 - You cannot enter a URL path to link to an application, if you require a ContactUs page for an application, contact the ContactUs Administrator for assistance

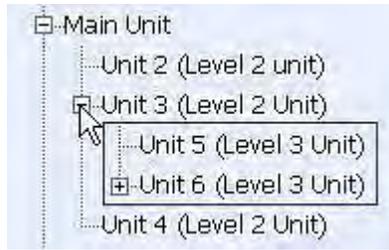
Unit and Subunit Structure

Hierarchal structure of unit and subunits levels

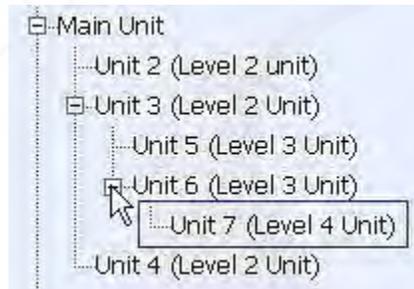
- Level 1 (parent unit)
 - Level 2 - subunits of level 1, select the **Expand** button to display level 2



- Level 3 - subunits of level 2, select the **Expand** button to display level 3



- Level 4 - subunits of level 3, select the **Expand** button to display level 4



Note: When creating each sublevel, the level above the sublevel becomes the parent

Creating a Unit

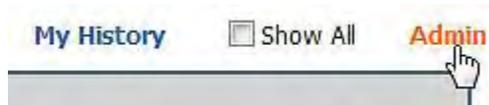
Administrators can create a unit from the Unit Selection page. ContactUs Administrators can create units for the application; Unit Administrators cannot create a unit.

Tips and Tricks

- When creating a unit, it is level 1 and no other units reside over it. Refer to Unit Menu - Navigation Bar for information on levels
- Enter information about the unit on the Add Unit page

How-To Create a Unit (Level 1)

- SME Inbox page
 - Select the Admin link



- Unit Selection page

- Select the **Add Unit** button
- Add Unit page
 - Enter **Unit Information** in the fields, refer to Field Definitions below for additional information
 - Select the **Preview** tab to view the ContactUs page
 - Select the **Edit** tab to return when finished reviewing the ContactUs page
 - Made any changes necessary before saving the new unit page
 - Select the **Save** button
- To add SMEs and/or Unit Administrators, refer to Adding and Removing Users
- To edit or remove a unit, refer to Editing Units and Subunits
- To move or merge units or subunits refer to Moving Units or Subunits

Field Definitions

Unit Full Name - Enter the name of the unit or subunit that will appear in the hierarchial structure of units and subunit on the Unit Selection page

Unit Short Name - Enter a short unique "key" word or phrase to use in the database. If the short name has several words, You are not allowed to use spaces between words but a underscore can be used for a space. Selecting the **Save** button, disables the Unit Short Name field from editing.

Link String - Enter the link that will be used to access the previously viewed unit, group, or application. Enter the link in Javascript or HTML code.

Page Text - Enter additional information that is to display on the ContactUs page. The maximum entry is 1500 characters.

Checkboxes:

Can Create Subunits - Check this box to allow subunits to be created and associated with this unit

Note: *When you select this checkbox, Unit Administrators will be able to create subunits*

Is visible to External units who choose to forward message - Check this box to allow SMEs from any ContactUs unit to forward messages to this unit

Note: When you select this checkbox, SMEs can forward messages to the comment's assigned SME

Allow SMEs to attach files - Check this box to allow an SME to upload and send file attachments when replying to a comment

Note: Upload any file type, file cannot exceed 5 MB in size, and remains available for 30 days from upload date

Allow Customers to attach files - Check this box to allow requestors to upload file attachments request

Note: Upload any file type, file cannot exceed 5 MB in size, and remains available for 30 days from upload date

Allow forwarding - Check this box to allow SMEs to forward comments to other ContactUs units or DOT employees

Note: If this checkbox is not checked, the forwarding option will not be available for selection on the Comment Information page

Creating Subunit

A subunit is a child contained within a unit (level 1 or parent). Subunits may have other associated subunits but they will have the same parent at level 1. ContactUs and Unit Administrators can create subunits for the application.

Tips and Tricks

- When creating a subunit, you must select the parent unit before you can create a subunit
- When creating a subunit of a selected subunit, the selected subunit becomes the parent for the newly created subunit.
- The number of subunit levels one can create is limitless.

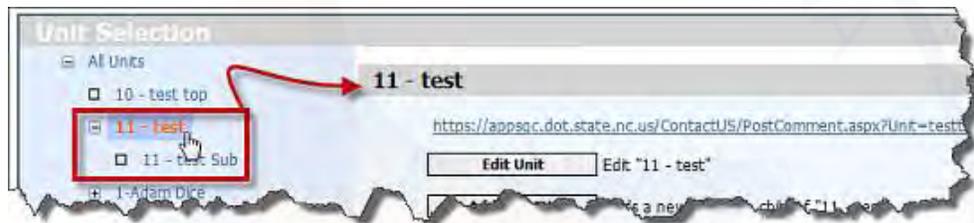
How-To Create a Subunit (Level 2, 3, 4, etc.)

- SME Inbox page
 - Select the Admin link
- Unit Selection page

- Locate and select the **Unit** from the Unit Selection navigation menu - once created, the subunit will appear under this selected unit
 - If you are creating a subunit under a subunit, locate and select the **Subunit** by using the Expand (+) button next to the parent unit

Note: If you select a subunit and Add Subunit button does not appear in the list of buttons, the **Can Create Subunits** checkbox is not checked for the subunit

- Verify that the Unit you selected appears in the banner, above the buttons



- Select the **Add SubUnit** button
- Add Unit page
 - Enter **Subunit Information** in the fields provided, refer to the Field Definitions below for additional information
 - Select the **Preview** tab to view the ContractUs page
 - Select the **Edit** tab to return when you are finished reviewing the page
 - Select the **Save** button
- To add SMEs and/or Unit Administrators, refer to Adding and Removing Users
- To edit or remove a subunit, refer to Editing Units and Subunits
- To move or merge units or subunits refer to Moving Units or Subunits

Field Definitions

Unit Full Name - Enter the name of the unit or subunit that will appear in the hierarchical structure of units and subunit on the Unit Selection page

Unit Short Name - Enter a short unique "key" word or phrase to use in the database. If the short name has several words, You are not allowed to use spaces between

words but an underscore can be used for a space. Selecting the **Save** button, disables the Unit Short Name field from editing.

Link String - Enter the link that will be used to access the previously viewed unit, group, or application. Enter the link in Javascript or HTML code.

Page Text - Enter additional information that is to display on the ContactUs page. The maximum entry is 1500 characters.

Default SME - Enter the SME's NCDOT user id, once the **Save** button is selected, this field is not visible. To edit the SME refer to Add or Remove Users for more information.

Checkboxes:

Can Create Subunits - Check this box to allow subunits to be created and associated with this subunit

Note: *When you select this checkbox, Unit Administrators will be able to create subunits*

Is visible to External units who choose to forward message - Check this box to allow SMEs from any ContactUs unit to forward messages to this subunit

Note: *When you select this checkbox, SMEs can forward messages to the comment's assigned SME*

Allow SMEs to attach files - Check this box to allow an SME to upload and send file attachments when replying to a comment

Note: *Upload any file type, file cannot exceed 5 MB in size, and remains available for 30 days from upload date and the file name remains in the Comment History of the comment*

Allow Customers to attach files - Check this box to allow requestors to upload file attachments request

Note: *Upload any file type, file cannot exceed 5 MB in size, and remains available for 30 days from upload date and the file name remains in the Comment History of the comment*

Allow forwarding - Check this box to allow SMEs to forward comments to other ContactUs units or DOT employees

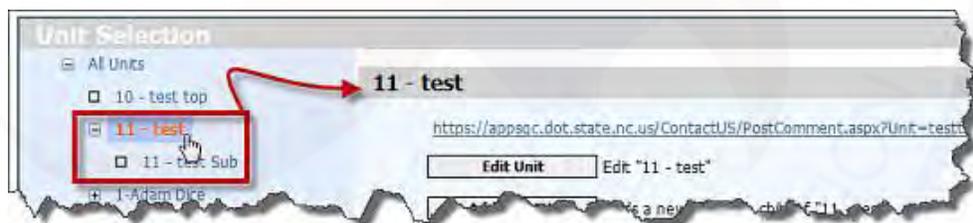
Note: If this checkbox is not checked, the forwarding option will not be available for selection on the Comment Information page

Editing Units and Subunits

Administrators can edit an existing unit or subunit information by using the Edit Unit feature.

How-To Edit an Unit or Subunit

- SME Inbox
 - Select the Admin link
- Unit Selection page
 - Locate and select the **Unit** from the Unit Selection navigation menu
 - If you are editing a subunit, locate and select the **Subunit** by using the Expand (+) button next to the parent unit
 - Verify that the Unit you selected appears in the banner, above the buttons



- Select the **Edit Unit** button
- Edit Unit page
 - Modify the **Unit/Subunit Information** refer to the Field Definitions for additional information

Note: You cannot modify the Unit Short Name field and the Default SME field is not visible

- Select the **Preview** tab to view the ContactUs page
- Select the **Edit** tab to return when finished reviewing the ContactUs page
- Select the **Save** button

- To edit the SMEs and/or Unit Administrators, refer to Adding and Removing SMEs and Administrators

Moving a Unit or Subunit

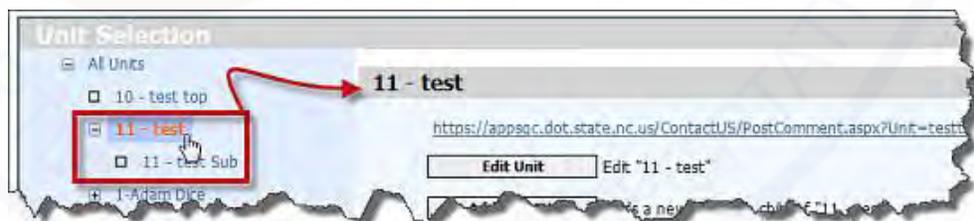
Only ContactUs Administrators can move units and subunits to be located under another unit or subunit.



Beware when a unit is moved, all subunits associated with the unit, also moves.

How-To Move a Unit or Subunit

- SME Inbox
 - Select the Admin link
- Unit Selection page
 - Locate and select the **Unit** from the Unit Selection navigation menu
 - If you are editing a subunit, locate and select the **Subunit** by using the Expand (+) button next to the parent unit
 - Verify that the Unit you selected appears in the banner, above the buttons



- Select the **Move Unit** button
- Move Unit page
 - Verify that the Unit or Subunit appears in the banner and appears in red above the All Units line



- Select the **Unit** or **Subunit** where you want to move the selected Unit/Subunit
 - Remember, to select a subunit, you must select the **Expand (+)** button next to the unit before you can select the subunit
 - Select the **Next >** button
- Move Unit (Verification & Confirmation) page
 - Review and verify that the unit/subunit you selected to move is correct
 - Review and verify that the location you selected to move the unit/subunit under is correct
 - Select **Yes** or **No** for the question: *Do you want to keep the existing SMEs for [unit/subunit name]?*

Note: If you select **No**, SMEs originally assigned to the unit/subunit (that is going to be moved) will not be assigned to the unit/subunit once the unit/subunit moves

All SMEs within the parent unit become Administrators in all the subunits
 - Select the **Submit** button.
- To assign SMEs to the unit/subunit, refer to Adding and Removing Users.

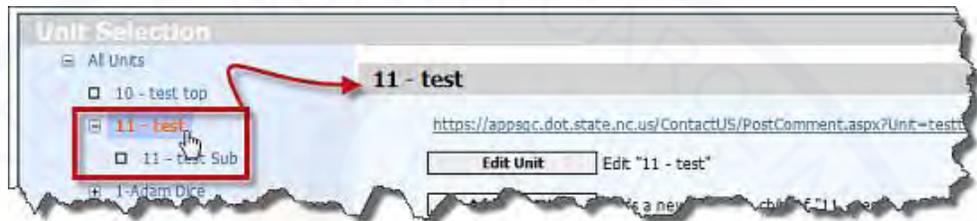
Deleting a Unit or Subunit

Super or Unit Administrators have the ability to delete units and subunits from the ContactUs application.

How-To Delete a Unit or Subunit

- SME Inbox
 - Select the Admin link
- Unit Selection page

- Select a **Unit** or **Subunit** from the Unit Selection Navigation,
 - To select a subunit, select the **Expand** (+) button of the unit; then, select the subunit
 - Verify that the Unit you selected appears in the banner, above the buttons



- Select the **Delete Unit** button
- Delete Unit page
 - Select the **Back** button, if there are any open comments and the following message appears

*** This unit currently has open comments. These comments must be closed before the unit can be deleted.**

- Select **SME Inbox** link to open the Inbox page and resolve all open comments; then, proceed to the next step
- Select **Move the comments**, radio button if you want to transfer the comments to another unit/subunit and remove the comments from the unit/subunit you are deleting
- Select the **Delete the Comments** radio button
- Select the **Submit** button

Tips and Tricks

- When deleting a unit or subunit, all open comments associated with that unit/subunit are close prior to using the delete function.
- As a precaution, the application will not allow you to delete a unit/subunit with open comments; the following message appears on the Delete Unit page.

*** This unit currently has open comments. These comments must be closed before the unit can be deleted.**

- When removing a unit or subunit from ContactUs, when selecting the Submit button, the Unit/Subunit is permanently remove from ContactUs. No confirmation message appears.
- Administrators, including the ContactUs Administrator cannot undo the deletion of a unit or subunit once it is deleted from the application.

Comment Search

SMEs and Administrators can use the search function to locate a specific comment by using search criteria that is specific to the request.

Tips and Tricks

- When you use the tracking number to search for a comment, you do not have to select a unit. The ContactUs application automatically searches all units/subunits in the database for the tracking number
- When searching by any other criteria, other than the tracking number, at least one field must have criteria.
- If you enter a begin date, you should enter an end date and vice versa

How-To Search for a Comment

- SME Inbox page
 - Select the **Admin** link



- Unit Selection page
 - Select **Search Comments** button
- Search/Edit Comments page

- Enter **Search Criteria** in at least one field - refer to the search criteria field definitions for more information
 - Tracking Number - if you entered a tracking number, you are not required to select a unit, subunit, or group
 - Dates - if you enter a begin date you should enter an end date or vice versa
 - Select a **Unit, Subunit, or Group** check box to specify the unit, subunit, group or **Select All** checkbox to search all units/subunits assigned to you
 - Select **Search** button
 - If multiple comments appear on search/Edit Comments page
 - Locate comment you want to view
 - Select the **Tracking Number** to view the comment details and history
 - Select the **Print** link to print the details of the comment



Field Definitions

Tracking Number - A unique number that auto-generates by the application upon submission. Use the Tracking numbers to search and view a specific comment/request. Users who submit comments use the tracking number to search for replies.

Begin Date - The date when to begin the search. Select the calendar button to display a calendar.

End Date - The date when to end the search. Select the calendar button to display a calendar.

Comment - A word or phrase that appears in the comment.

Email - The requestor's e-mail address.

From - The name of the requestor; or, the person who checks the Anonymous checkbox.

Search Messages Forwarded to Other Units Only Checkbox - Select this checkbox to search for only forwarded messages. Once checked, the page refreshes and limits the search results even further.

Editing Comments

Administrators are the only users who have the ability to modify a comment, which includes the ability to change the status, the assigned SME, or the requestor's e-mail address.

Tips and Tricks

- Edit an e-mail address if the requestor submitted a comment anonymously and now wants to receive e-mail notifications
- Edit an e-mail address if the requestor entered the e-mail address incorrectly
- Edit an SME if the assigned SME is out of the office (vacation, on sick leave, etc.)
 - Be aware, comments are resigned only to an SME within the same unit/subunit
 - To reassign the comment to another unit, use the Forward a Comment process
- Edit the status of a comment when the comment is reassign because the SME will not see the comment in the SME Inbox otherwise
 - Note, when an SME has replied to a comment the status automatically changes to closed
- Comments are reopen if the requestor submits another inquiry in the same comment (if they are replying to an SME)
- The ContactUs application retains all history and actions associated with the comment
- Edit the status of a comment if the comment is marked spam. Note, the Spam feature is not functional at this time

How-To Edit a Comment

- Refer to Comment Search for how-to procedures. Locate the comment, then proceed to the next step.
- Search/Edit Comments page
 - Select the **Tracking Number** link of the comment
 - To edit the e-mail of the requestor
 - Highlight the e-mail address and enter the new address
 - To reassign another SME (within the same unit/group)
 - Select an SME from the **Assigned To** drop-down list
 - To edit the status of a comment
 - Select **Open**, **Closed** or **Deleted** from the State drop-down list
 - **Open** - Open status implies the SME has not been sent a reply for the latest request. Be aware that the word, Open, does not appear in the SME Inbox.
 - **Closed** - Closed status removes the comment from view in the SME Inbox. Closed status is triggered by a SME replying to the requestor.
 - **Deleted** - Deleted status removes the comment from the SME Inbox by a SME selecting Delete comment. Deleting resolves the comment without the SME having to reply to the requestor.
 - To print the details of a request, select the **Print** link
 - Select the **Update Comment** button
 - A confirmation message appears: *Your Changes have been Saved*
 - Select the **Unit Selection** breadcrumb to return to the Admin page



Retrieving a Deleted Comment

Administrators can re-open a comment when an SME accidentally deletes the comment from the Inbox. The SME must provide unique information to identify the comment before an Administrator can retrieve and change the status.

Tips and Tricks

- When changing the status of a comment, you can also modify the Assigned To person
- When changing the status of a comment, you can modify the requestor's e-mail address
- Once the status changes, the comment appears in the unit Inbox from which it was deleted

How-To Retrieve a Deleted Comment

- Refer to Comment Search for how-to procedures. Locate the comment, then proceed to the next step.
- Search Criteria Page
 - Select the **Tracking Number** link to display the comment's details
 - Edit Results section
 - Select **Open** from the State drop-down list
 - Select the **Update Comment** button
 - Select the **Print** link to print the details of the comment



Generating Reports

Administrators can generate reports on SME activity within specific units by using the Basic and Detailed reports. Each report exports to Microsoft Excel and is printable using the printing feature in Excel.

Basic Report - The basic report provides the number of comment responses for the selected unit and subunits during a specified period of time.

Detailed Report - The detailed report identifies the users that have responded to and updated comments within the selected unit and level 2 subunits for a specified period-of-time.

Tips and Tricks

- When you select a unit, the report includes all subunits under that unit
- When entering a date range, the range applies to both the unit and subunits under the parent
 - Date format is 00/00/0000
- If you do not select a report type (basic or detailed) the application defaults to Basic Report

Generating a Report

- Unit Selection page
 - Locate and select the **Unit** or **Subunit** from the Unit Selection navigation menu
 - Verify that the Unit you selected appears in the banner, above the buttons



- Select the **Reporting** button
- Contact Us Administrator Reporting page
 - Select **Basic Report** or **Detailed Report** button
 - Enter a **Date Range** in the Begin and End Date fields
 - Select the **Run Report** button
 - Data appears under the Run Report button
- Export Data to Microsoft Excel

- Select the **Excel** link



- Refer to Microsoft Excel's functions to sort, edit, and print data

Spam Feature

Spam refers to as unsolicited comments sent to recipients

The Spam feature in the ContactUs application is disable and not functional at this time.

Please be aware that the Span buttons will continue to appear on pages until it is determined that the functionality should be removed from the application.

Troubleshooting

If your situation/issue cannot be resolved using this section or help guide, contact the NCDOT Help Desk.

If you have a question/comment about the help guide, select this ContactUs link to contact the documentation specialist.

I keep receiving ContactUs e-mail messages for comments that I have already replied to. How do I stop these comments from appearing every morning in my email?

- Did you log into the ContactUs application and respond to the citizen?
 - If you did not, you will continue receiving e-mail(s) on a daily basis.
 - You need to either respond to the citizen, forward the comment to another SME, or delete the comment (assuming that the comment was answered and the citizen was notified).
 - To delete a comment - refer to Delete a Comment for more information

I keep receiving ContactUs e-mail messages that I am not supposed to be handling. How can I direct these messages to another SME?

- If you occasionally receive an e-mail by mistake, forward the comment to another SME. Refer to Forwarding a Comment for more information
- If you are constantly receiving comments that you do not want to receive, then you may need to create another unit or subunit for your group. Units/subunits allow you to assign SMEs to specific types of comments. Refer to Create a Unit or Subunit in the Administrative Guide.

I cannot open a comment.

- Once a SME opens a comment, the SME is assign the until the SME closes the comment. During this time, other SMEs cannot to open the comment.

Why can't I search for a comment I forwarded to another group?

- Yes, you can, if you are an SME, ContactUs, or Unit Administrator. Refer to Comment Search for more information.



Support

For all questions or assistance with the ContactUS application, please call or e-mail the **NCDOT HelpDesk**.

Phone numbers:

919.707.7000 - in Raleigh area

1.800.368.2778 - statewide

E-mail address:

dothelp@ncdot.gov

If you have questions or comments about the **ContactUS Help guide**, please send a message using the ContactUs page.

To contact the **ContactUs System Administrator**, please use the following ContactUs page:

<https://apps.dot.state.nc.us/ContactUS/PostComment.aspx?Unit=AdminCUs>