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| **Philly CRM 311**  **Technical Design – Sanitation Violation**  **V1.0** |
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# REVISION HISTORY

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| --- | --- | --- | --- |
| **Revision Number** | **Revision Date** | **Summary of Changes** | **Author** |
| Draft | 04/28/2014 | Created Draft | Murugaboopathi |
| 1.0 | 05/06/2014 | Modified Based 1.8 of SR | Prabhakar |

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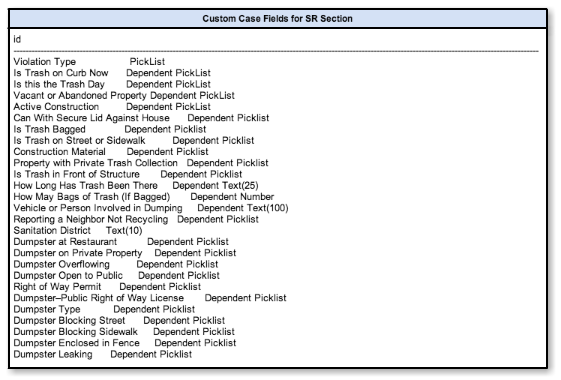
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# 2 – SERVICE REQUEST INFORMATION

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| **Case Record Type :** | **Sanitation Violation** |
| **Service Request ID** | **SR-ST19 Sanitation Violation** |
| **Service Request Type** | **Sanitation Violation** |
| **Department** | **Streets Department** |

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| 2.1 ENTITY RELATIONSHIP DIAGRAM |





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| 2.2.1 CASE STANDARD FIELDS |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Field Label** | **Field Name** | **Data Type** | **Required** | **Unique** | **Default Value** | **External ID** | **Rule #** | **History** | **Help Text** |
| Status | Status | Picklist  **Values:** New, In-Progress, Escalated, On Hold, and Closed | Yes | No | New | No | None | Yes |  |
| Case Origin | Origin | Picklist  **Values:** Phone, Email, Web | Yes | No | Phone | No | None | Yes |  |
| Priority | Priority | Picklist  **Values:** 1,2,3,4,5,6,7,8,9 | Yes | No | 5 | No | None | Yes |  |

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| 2.2.2 CUSTOM FIELDS |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Field Label** | **Field Name** | **Field Type** | **Required** | **Unique** | **Default Value** | **External ID** | **Rule #** | **History** | **Field Help Text** |
| Violation Type | Violation\_Type\_\_c | Picklist  **Values:** Sanitation, Dumpster, Both | Yes |  |  |  | None | No | Is the reported violation regarding trash (sanitation), a dumpster, or both? |
| Is Trash on Curb Now | Is\_Trash\_on\_Curb\_Now\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #1**) | Yes |  |  |  | Workflow Rule #1, Validation Rule #1 | No | Is the trash still on the curb right now? |
| Is This the Trash Day | Is\_This\_the\_Trash\_Day\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #2)** | Yes |  |  |  | Workflow Rule #2, Validation Rule #1 | No | Auto-Populated based on GIS. Read only. |
| Vacant or Abandoned Property | Vacant\_or\_Abandoned\_Property\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #3)** | Yes |  |  |  | Workflow Rule #3, Validation Rule #1 | No | Is the trash on a vacant or abandoned property? |
| Active Construction | Active\_Construction\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #4**) | Yes |  |  |  | Workflow Rule #4, Validation Rule #1 | No | Is active construction underway at the trash site? |
| Can With Secure Lid Against House | Can\_With\_Secure\_Lid\_Against\_House\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #5**) | Yes |  |  |  | Workflow Rule #5, Validation Rule #1 | No | Is the can up against the house with a secure lid on it and no litter around it? |
| Is Trash Bagged | Is\_Trash\_Bagged\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #6**) | Yes |  |  |  | Workflow Rule #6, Validation Rule #1 | No | Is the trash bagged or is it loose? |
| Is Trash on Street or Sidewalk | Is\_Trash\_on\_Street\_or\_Sidewalk\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #7**) | Yes |  |  |  | Workflow Rule #7, Validation Rule #1 | No | Is it a public right-of-way for pedestrians or vehicles? |
| Construction Material | Construction\_Material\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #8**) | Yes |  |  |  | Workflow Rule #8, Validation Rule #1 | No | Is the trash construction materials (bricks, concrete, drywall, other remodeling house setouts, etc.)? |
| Property with Private Trash Collection | Property\_with\_Private\_Trash\_Collection\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #9**) | Yes |  |  |  | Workflow Rule #9, Validation Rule #1 | No | Is the trash located on a property with private trash collection? |
| Is Trash in Front of Structure | Is\_Trash\_in\_Front\_of\_Structure\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #1**0) | Yes |  |  |  | Validation Rule #1 | No | Is the trash in front of a structure? |
| How Long Has Trash Been There | How\_Long\_Has\_Trash\_Been\_There\_\_c | Dependent Text(25)  (**Section 2.2.3 Dependent Picklist Rule #11**). | Yes |  |  |  | Validation Rule #1 | No | How long has the trash been in the current location? |
| How Many Bags of Trash (If Bagged) | How\_Many\_Bags\_of\_Trash\_If\_Bagged\_\_c | Dependent Number  (**Section 2.2.3 Dependent Picklist Rule #1**2).. | No |  |  |  | Validation Rule #1 | No | If the trash is in bags, how many bags are there? |
| Vehicle or Person Involved in Dumping | Vehicle\_or\_Person\_Involved\_in\_Dumping\_\_c | Dependent Text(100)  (**Section 2.2.3 Dependent Picklist Rule #1**3) | No |  |  |  | Validation Rule #1 | No | Description of the person or vehicle and plate information such as licensing state and tag number, if known. |
| Reporting a Neighbor Not Recycling | Reporting\_a\_Neighbor\_Not\_Recycling\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #1**4) | No |  |  |  | Validation Rule #1 | No | Is the customer reporting that a neighbor is not recycling? |
| Sanitation District | Sanitation\_District\_\_c | Text(10) | Yes |  |  |  | Workflow Rule #2 | No | Auto-Populated |
| Dumpster at Restaurant | Dumpster\_at\_Restaurant\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #1**5). | Yes |  |  |  | Workflow Rule #10, Validation Rule #2 | No | Is the dumpster violating regulations a restaurant dumpster? |
| Dumpster on Private Property | Dumpster\_on\_Private\_Property\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #1**6).. | Yes |  |  |  | Workflow Rule #11, Validation Rule #2 | No | Is the dumpster on private property? |
| Dumpster Overflowing | Dumpster\_Overflowing\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #1**7). | Yes |  |  |  | Workflow Rule #12, Validation Rule #2 | No | Is the dumpster overflowing? |
| Dumpster Open to Public | Dumpster\_Open\_to\_Public\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #1**8) | Yes |  |  |  | Workflow Rule #13, Validation Rule #2 | No | Is the dumpster open to the public (rather than locked, locked behind a gate, etc.)? |
| Right of Way Permit | Right\_of\_Way\_Permit\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #1**9). | Yes |  |  |  | Validation Rule #2 | No | Is there a Right of Way permit associated with the dumpster? |
| Dumpster–Public Right of Way License | Dumpster\_Public\_Right\_of\_Way\_License\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #20)**. | Yes |  |  |  | Validation Rule #2 | No | Is there a Dumpster–Public Right of Way License associated with the dumpster? |
| Dumpster Type | Dumpster\_Type\_\_c | Dependent Picklist  **Values:** Rubbish/Recycling, Construction  (**Section 2.2.3 Dependent Picklist Rule #21)**. | Yes |  |  |  | Validation Rule #2 | No | Is the dumpster used for rubbish/recycling or is it used for construction? |
| Dumpster Blocking Street | Dumpster\_Blocking\_Street\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #22)**. | Yes |  |  |  | Workflow Rule #14, Validation Rule #2 | No | Is the dumpster blocking a street? |
| Dumpster Blocking Sidewalk | Dumpster\_Blocking\_Sidewalk\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #23)**.. | Yes |  |  |  | Validation Rule #2 | No | Is the dumpster blocking a sidewalk? |
| Dumpster Enclosed in Fence | Dumpster\_Enclosed\_in\_Fence\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #24).** | No |  |  |  | Workflow Rule #15, Validation Rule #3 | No | Is the dumpster blocking the sidewalk enclosed inside a fence? |
| Dumpster Leaking | Dumpster\_Leaking\_\_c | Dependent Picklist  **Values:** Yes, No  (**Section 2.2.3 Dependent Picklist Rule #25)**. | Yes |  |  |  | Validation Rule #2 | No | Is the dumpster leaking? |

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| 2.2.3 Dependent Picklist |

**Dependent Picklist Rule #1:**

Control Field Name: Violation Type

Dependent Field Name: Is Trash on Curb Now

Values = Yes, No

Is Trash on Curb Now is enabled and required when Violation Type = ‘Sanitation’ or ‘Both’.

**Dependent Picklist Rule #2:**

Control Field Name: Violation Type

Dependent Field Name: Is This the Trash Day

Values = Yes, No

Is This the Trash Day is enabled and required when Violation Type = ‘Sanitation’ or ‘Both’.

**Dependent Picklist Rule #3:**

Control Field Name: Violation Type

Dependent Field Name: Vacant or Abandoned Property

Values = Yes, No

Vacant or Abandoned Property is enabled and required when Violation Type = ‘Sanitation’ or ‘Both’.

**Dependent Picklist Rule #4:**

Control Field Name: Violation Type

Dependent Field Name: Active Construction

Values = Yes, No

Active Construction is enabled and required when Violation Type = ‘Sanitation’ or ‘Both’.

**Dependent Picklist Rule #5:**

Control Field Name: Violation Type

Dependent Field Name: Can With Secure Lid Against House

Values = Yes, No

Is Trash Bagged is enabled and required when Violation Type = ‘Sanitation’ or ‘Both’.

**Dependent Picklist Rule #6:**

Control Field Name: Violation Type

Dependent Field Name: Is Trash Bagged

Values = Yes, No

Is Trash Bagged and required when Violation Type = ‘Sanitation’ or ‘Both’.

**Dependent Picklist Rule #7:**

Control Field Name: Violation Type

Dependent Field Name: Is Trash on Street or Sidewalk

Values = Yes, No

Is Trash on Street or Sidewalk is enabled and required when Violation Type = ‘Sanitation’ or ‘Both’.

**Dependent Picklist Rule #8:**

Control Field Name: Violation Type

Dependent Field Name: Construction Material

Values = Yes, No

Construction Material is enabled and required when Violation Type = ‘Sanitation’ or ‘Both’.

**Dependent Picklist Rule #9:**

Control Field Name: Violation Type

Dependent Field Name: Property with Private Trash Collection

Values = Yes, No

Property with Private Trash Collection is enabled and required when Violation Type = ‘Sanitation’ or ‘Both’.

**Dependent Picklist Rule #10:**

Control Field Name: Violation Type

Dependent Field Name: Is Trash in Front of Structure

Values = Yes, No

Is Trash in Front of Structure is enabled and required when Violation Type = ‘Sanitation’ or ‘Both’.

**Dependent Picklist Rule #11:**

Control Field Name: Violation Type

Dependent Field Name: How Long Has Trash Been There

Values = Yes, No

How Long Has Trash Been There is enabled and optional when Violation Type = ‘Sanitation’ or ‘Both’.

**Dependent Picklist Rule #12:**

Control Field Name: Violation Type

Dependent Field Name: How Many Bags of Trash (If Bagged)

Values = Yes, No

How Many Bags of Trash (If Bagged) is enabled and optional when Violation Type = ‘Sanitation’ or ‘Both’.

**Dependent Picklist Rule #13:**

Control Field Name: Violation Type

Dependent Field Name: Vehicle or Person Involved in Dumping

Values = Yes, No

Vehicle or Person Involved in Dumping is enabled and optional when Violation Type = ‘Sanitation’ or ‘Both’.

**Dependent Picklist Rule #14:**

Control Field Name: Violation Type

Dependent Field Name: Reporting a Neighbor Not Recycling

Values = Yes, No

Reporting a Neighbor Not Recycling is enabled and optional when Violation Type = ‘Sanitation’ or ‘Both’.

**Dependent Picklist Rule #15:**

Control Field Name: Violation Type

Dependent Field Name: Dumpster at Restaurant

Values = Yes, No

Dumpster at Restaurant is enabled and required when Violation Type = ‘Dumpster’ or ‘Both’.

**Dependent Picklist Rule #16:**

Control Field Name: Violation Type

Dependent Field Name: Dumpster on Private Property

Values = Yes, No

Dumpster on Private Property is enabled and required when Violation Type = ‘Dumpster’ or ‘Both’.

**Dependent Picklist Rule #17:**

Control Field Name: Violation Type

Dependent Field Name: Dumpster Overflowing

Values = Yes, No

Dumpster Overflowing is enabled and required when Violation Type = ‘Dumpster’ or ‘Both’.

**Dependent Picklist Rule #18:**

Control Field Name: Violation Type

Dependent Field Name: Dumpster Open to Public

Values = Yes, No

Dumpster Open to Public is enabled and required when Violation Type = ‘Dumpster’ or ‘Both’.

**Dependent Picklist Rule #19:**

Control Field Name: Violation Type

Dependent Field Name: Right of Way Permit

Values = Yes, No

Right of Way Permit is enabled and required when Violation Type = ‘Dumpster’ or ‘Both’.

**Dependent Picklist Rule #20:**

Control Field Name: Violation Type

Dependent Field Name: Dumpster–Public Right of Way License

Values = Yes, No

Dumpster–Public Right of Way License is enabled and required when Violation Type = ‘Dumpster’ or ‘Both’.

**Dependent Picklist Rule #21:**

Control Field Name: Violation Type

Dependent Field Name: Dumpster Type

Values = Rubbish/Recycling, Construction

Dumpster Type is enabled and required when Violation Type = ‘Dumpster’ or ‘Both’.

**Dependent Picklist Rule #22:**

Control Field Name: Violation Type

Dependent Field Name: Dumpster Blocking Street

Values = Yes, No

Dumpster Blocking Street is enabled and required when Violation Type = ‘Dumpster’ or ‘Both’.

**Dependent Picklist Rule #23:**

Control Field Name: Violation Type

Dependent Field Name: Dumpster Blocking Sidewalk

Values = Yes, No

Dumpster Blocking Sidewalk is enabled and required when Violation Type = ‘Dumpster’ or ‘Both’.

**Dependent Picklist Rule #24:**

Control Field Name: Violation Type

Dependent Field Name: Dumpster Enclosed in Fence

Values = Yes, No

Dumpster Enclosed Fence is enabled and required when Violation Type = ‘Dumpster’ or ‘Both’.

**Dependent Picklist Rule #25:**

Control Field Name: Violation Type

Dependent Field Name: Dumpster Leaking

Values = Yes, No

Dumpster Leaking is enabled and required when Violation Type = ‘Dumpster’ or ‘Both’.

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| 2.2.4 Force.com Objects |

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| **Custom/Standard** | **Existing Objects** | **New Objects** |
| Standard | Case |  |
| Standard | Account |  |
| Standard | Contact |  |
| Custom | PKB Article Deflection |  |

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| 2.3 HIGH LEVEL SYSTEM PROCESS FLOW |



# 3 - NEW FUNCTIONALITY

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| 3.1 CONFIGURATION DETAILS |

**Case Record Type:** *Sanitation Violation*

Label: Sanitation Violation

Support Process: *Sanitation Violation*

Support Process Selected Values:

* New
* In-Progress
* Escalated
* On Hold
* Closed

Record Type Name: Sanitation Violation

**Buttons:**

* Case Edit
  + Save
  + Save & Close
  + Cancel
* Case Detail
  + Edit
  + Delete
  + Close Case
  + Clone

**Tab Setup:**

**App Setup:**  Call Center Console

**User Profile Setup:**

* 311 Agents
* 311 Supervisors
* Case Workers
* System Administrators

**Permission Set Setup:** Please refer Profile & Permission Setup and Profile technical design.

**Role Hierarchy Considerations:** TBD

**Workflows:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Rule #** | **Rule Name** | **Action** | **Rule Criteria** | **Object** | **Evaluation Criteria** |
| 1 | Workflow Rule for Is Trash on Curb Now | Display message: “The customer should call back when the violation is visible on the curb or driveway.”  Automatically change Service Request Type to “Service Not Needed’ and save the case.  Automatically assign the case and then close it with a Close Reason = “Service Not Needed”. | Is Trash on Curb Now = ‘No’ | Case | Evaluate the rule when a record is created. |
| 2 | Workflow Rule for Is This the Trash Day | If this is the trash day for the service address, then 1) Is This the Trash Day = ‘Yes’. Display message: “This is the trash day for that location. If the trash is not picked up today, then report the sanitation violation”.  2) Automatically change Service Request Type to “Service Not Needed’ and save the case.  3) Automatically assign the case and then close it with a Close Reason = “Service Not Needed”. | Use the Service Address to determine the address validity and GIS location and the Service Address | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 3 | Workflow Rule for Vacant or Abandoned Property | Display message: “The system has changed the Case Record Type to Vacant Lot Clean-Up.”    Automatically change the Case Record Type = ‘Vacant Lot Clean-Up’. | If Vacant or Abandoned Property = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 4 | Workflow Rule for Active Construction | Display message: “The system has changed the Case Record Type to Illegal Dumping.”    Automatically change the Case Record Type = ‘Illegal Dumping’. | If Active Construction = ‘No’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 5 | Workflow Rule for Can With Secure Lid Against House | 1) Display message: “This is not a sanitation violation.”  2) Automatically change Service Request Type to “Service Not Needed’ and save the case.  3) Automatically assign the case and then close it with a Close Reason = “Service Not Needed”. | Can With Secure Lid Against House = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 6 | Workflow Rule for Is the trash bagged | Display message: “The system has changed the Case Record Type to Illegal Dumping.”    Automatically change the Case Record Type = ‘Illegal Dumping’. | Is the trash bagged = ‘No’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 7 | Workflow Rule for Is Trash on Street or Sidewalk | Display message: “The system has changed the Case Record Type to Illegal Dumping.”    Automatically change the Case Record Type = ‘Illegal Dumping’. | Is Trash on Street or Sidewalk = ‘No’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 8 | Workflow Rule for Construction Materials | Display message: “The system has changed the Case Record Type to Illegal Dumping.”    Automatically change the Case Record Type = ‘Illegal Dumping’. | Construction Materials = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 9 | Workflow Rule Property with Private Trash Collection | 1) Display message: “Private collection companies maintain alternate pickup dates.”  2) Automatically change Service Request Type to “Service Not Needed’ and save the case.  3) Automatically assign the case and then close it with a Close Reason = “Service Not Needed”. | Property with Private Trash Collection = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 10 | Workflow Rule for Restaurant Dumpster | Display Message: “To report a restaurant dumpster violation, contact the Health Department - Office of Food Protection at 215-685-7495.”  Automatically change Service Request Type to “Service Not Needed’ and save the case.  Automatically assign the case and then close it with a Close Reason = “Service Not Needed”. | Restaurant Dumpster = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 11 | Workflow Rule for Dumpster on Private Property | Display message: “The system has changed the Case Record Type to Maintenance Residential or Commercial.”    Automatically change the Case Record Type = ‘Maintenance Residential or Commercial’. | Dumpster on Private Property = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 12 | Workflow Rule for Dumpster Overflowing | Display message: “The system has changed the Case Record Type to Maintenance Residential or Commercial.”    Automatically change the Case Record Type = ‘Maintenance Residential or Commercial’. | Dumpster on Private Property = ‘Yes’ AND Dumpster Overflowing = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 13 | Workflow Rule for Open to Public | Display Message: “If the dumpster is not accessible to the public, the Streets Department cannot inspect the dumpster.”  Automatically change Service Request Type to “Service Not Needed’ and save the case.  Automatically assign the case and then close it with a Close Reason = “Service Not Needed”. | Open to Public = ‘No’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 14 | Workflow Rule for Dumpster Blocking Street | Display Message: “If the dumpster blocking a street is a construction dumpster and there is a Right of Way permit and there is a Dumpster–Public Right of Way license, inform the customer that there is no dumpster violation.”  Automatically change Service Request Type to “Service Not Needed’ and save the case.  Automatically assign the case and then close it with a Close Reason = “Service Not Needed”. | If Dumpster Type = ‘Construction’ AND Dumpster Blocking Street = ‘Yes’ AND Right of Way Permit = ‘Yes’ AND Dumpster–Public Right of Way License = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 15 | Workflow Rule for Dumpster Enclosed in Fence | Display Message: “If the dumpster that is blocking the sidewalk is enclosed inside a fence, there is no sanitation violation.”  Automatically change Service Request Type to “Service Not Needed’ and save the case.  Automatically assign the case and then close it with a Close Reason = “Service Not Needed”. | Dumpster on Sidewalk = ‘Yes’ AND Dumpster Enclosed in Fence = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |

**Approval Processes:**  None

**Reports & Dashboards:** None

**Validation Rules**

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| --- | --- | --- | --- |
| **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** |
| 1 | Validation Rule for Trash Only *Violation Type* | If *Violation Type* = ‘Sanitation’ then the following fields may be populated (not NULL): Is Trash on Curb Now, Is This the Trash Day, Vacant or Abandoned Property, Active Construction, Can With Secure Lid Against House, Is Trash Bagged, Is Trash on Street or Sidewalk, Construction Material, Property with Private Trash Collection, Is Trash in Front of Structure, How Long Has Trash Been There, How May Bags of Trash (If Bagged), Vehicle or Person Involved in Dumping, Reporting a Neighbor Not Recycling |  |
| 2 | Validation Rule for Dumpster Only *Violation Type* | If *Violation Type* = ‘Dumpster’ then the following fields may be populated (not NULL): Dumpster at Restaurant, Dumpster on Private Property, Dumpster Overflowing, Dumpster Open to Public, Right of Way Permit, Dumpster–Public Right of Way License, Dumpster Type, Dumpster Blocking Street, Dumpster Blocking Sidewalk, Dumpster Leaking |  |
| 3 | Validation Rule for *Dumpster Enclosed in Fence* | If *Dumpster Blocking Sidewalk* = ‘Yes’ then *Dumpster Enclosed in Fence* must be populated (not NULL). |  |

**Queue(s) :** *Sweep*

**Queue Members :** Donald Carlton; Tamalar Geiger; Keith Warren; William Smith

* **Email Notifications:** if the Agent is selected “Send Notification Email to Contact” checkbox then send Email to Contact using “Case Creation” template.

**Public Groups:** None

**Sharing Rules:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Rule Name** | **Criteria** | **Shared With** | **Access Level** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Custom Report Types:** None Defined

**Chatter Enabled Objects:** NONE

**Documents And Attachments** :

**Flow/Agent Instructions(Left side of the Layout)**:

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| * Purpose:To report rubbish which is set out too early and/or other violations of the Sanitation Code, including a dumpster violation. * Contact fields: Enter the customer’s name and contact information (required if the sanitation department needs to obtain additional information about the violation). * Service Address fields: Enter the exact address of the violation. * Description field: Provide any additional information about the location or type of violation. * Advise the customer: * If the trash is not on the curb now, call back when the violation is visible -- on the curb or driveway. * If a household sets out trash and/or recyclables on the normal setout date, on a holiday week, a violation will not be issued. * Collection time: The Streets Department collects trash, rubbish, and recycling throughout the day, up to 7 PM. If the entire street was missed and it is not yet 7 PM, advise the customer to submit the request after 7 PM if the pickup did not occur. * Mattresses and box springs must be bagged and sealed in plastic mattress bags in order to be collected. Mattresses and box springs that are **not** properly bagged will **not** be collected nor accepted at our Sanitation Convenience Centers. Mattress bags are available at many retail stores and on-line. * Regular collection: From October 1 through March 31, trash and recycling should be set out between 5:00 PM the night before collection day and 7:00 AM the day of collection. Set-out times from April 1 to September 30 will return to 7:00 PM the night before and by 7:00 AM the day of collection. * Early collection: (Vine St. to Bainbridge St., from Schuylkill River to Delaware River): From October 1 through March 31 set out trash and recycling between 6 pm the night before collection day and 6 am on the day of collection. From April 1 through September 30 set out between 8 pm the night before collection day and 6 am on the day of collection at your regularly authorized pickup site. * Holiday collection: The City observes 11 holidays when trash and recycling collection will be one day behind schedule for the remainder of the week. This does not include disturbances from weather and road closures. The holiday schedule is at <http://www.philadelphiastreets.com/san-residential-collection-schedules.aspx>. * Snow storms may delay trash and recycling collections. Customers must set their collections out for pick up at curbside on their regularly scheduled trash day, placing items at curbside as crews navigate through the snow, and on top of snow mounds so they are visible to crews. * Recycling: Recycling is mandatory. SWEEP officers issue tickets to recycling offenders. * Recycling day: The customer can go to <http://citymaps.phila.gov> and type in their address in the search bar to find out their trash and recycling day. * Wood scraps and other loose items must be securely tied into bundles no more than four feet long and two feet thick. * Cardboard boxes may never be used as containers for trash, regardless of who collects it. * Trash containers: A single-family household is allowed a maximum of four (4) 32 gallon containers or eight (8) 30 – 32 gallon bags of trash each week. All other premises are allowed a maximum of six (6) 32 gallon containers or twelve (12) 30 - 32 gallon bags. The resident is responsible for providing the collection containers; there are no City-provided containers. * The weight limit for a bag or can is 40 lbs. The total weight should not exceed 240 lbs. * Recycling containers: The City collects both trash and recycling on the same day. For recycling, the customer can use any sturdy plastic or metal container that holds 32 gallons or less; just mark it with the word "RECYCLING" on its side. If one bin is not enough to hold all recyclables, simply add another one. The customer can put all recyclables together in one bin--cans, glass, mixed paper, cardboard and most plastic containers--no need to sort or separate them. * Redress: The Streets Department will pick up any missed collections on the next day. The Streets Department will address sanitation violations within 5 days. * See the City's Regulations Governing Municipal And Private Collection Of Refuse at <http://www.philadelphiastreets.com/pdf/regs-may-2013.pdf> for details of sanitation violations.   + The Streets Department inspects dumpsters in the public right of way only.   + The dumpster needs to be open to public access for the Streets Department to address a dumpster issue. It cannot be locked, behind a locked gate, etc.   + This task should be investigated and resolved by the Streets Department within 3 business days. * Every dumpster user in the city requires approval to use and place a dumpster. |

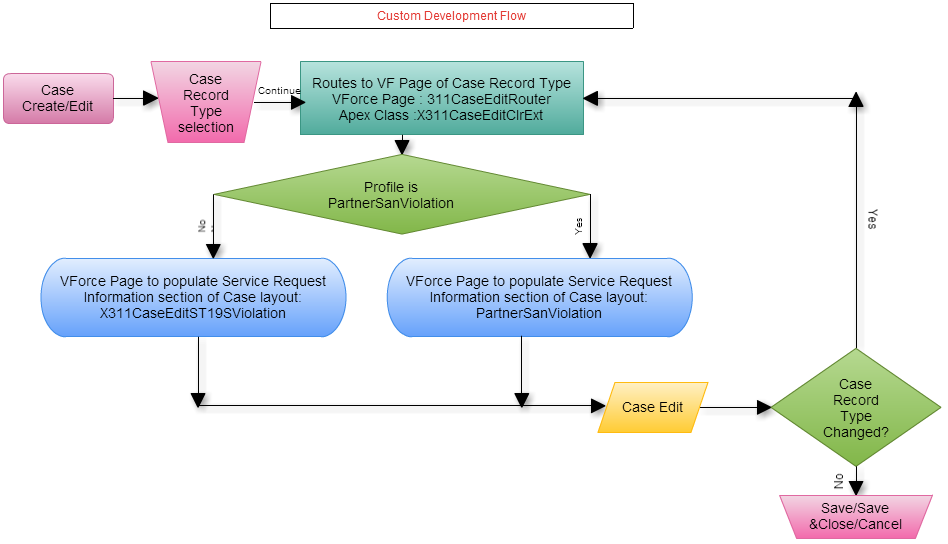
|  |
| --- |
| 3.2 DATA SHARING MODEL |

|  |  |  |  |
| --- | --- | --- | --- |
|  | ***User Types*** | ***Permission Sets*** | ***Public Groups*** |
| *LEVEL 1* |  |  |  |
| *LEVEL 2* |  |  |  |
| *LEVEL 3* |  |  |  |

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| 3.3 CUSTOM DEVELOPMENT DETAILS |

**Visualforce Pages**

* For Case Location Section in Case Detail: Create a VF Page which will use SR Location to depict Street,City,State in a Map.



**Custom Flow :** For standard button New/Edit button is replaced with a custom Visualforce Page **X311CaseEditRouter**. All the Visual force pages and related extensions are defined as follows.

**Visual Force Page : X311CaseEditRouter**

**Purpose:**  To route to SR specific Visual force page.

<apex:page standardcontroller="Case" extensions="X311CaseEditClrExt" action="{!redir}">

</apex:page>

**Apex Class : X311CaseEditClrExt**

public PageReference redir() {

* + - 1. Get current page parameters.
      2. Get the relevant Page depending on the Profile and Record Type(X311CaseEditST19SViolation or PartnerSanViolation)..
      3. Redirect to the page with parameters.

}

**Visual Force Page : X311CaseEditST19SViolation**

<apex:page standardcontroller="Case">

<apex:composition template="X311CaseEdit">

<apex:define name="typeSpecific">

<apex:pageblocksection title="Service Request Information" showheader="true" collapsible="true" columns="2">

**SR Sanitation Violation SPECEFIC FIELDS**

</apex:pageblocksection>

</apex:define>

</apex:composition>

</apex:page>

**Visual Force Page : X311CaseEdit**

<apex:page standardcontroller="Case" extensions="X311CaseEditClrExt">

<apex:pageblock mode="edit">

<apex:pageblocksection title="Department Details">

</apex:pageblocksection>

<apex:pageblocksection title="Case Information">

</apex:pageblocksection>

<apex:pageblocksection title="Service Request Location">

</apex:pageblocksection>

<apex:inputTextArea id="caseInternalComments" >

</apex:pageblocksection>

<apex:pageblocksection title="Description Information">

</apex:pageblocksection>

<apex:pageblock>

</apex:page>

**Visual Force Page : PartnerSanViolation**

<apex:page standardcontroller="Case" extensions="X311CaseEditClrExt">

<apex:pageblock mode="edit">

<apex:pageblocksection title="Department Details">

</apex:pageblocksection>

<apex:pageblocksection title="Case Information">

</apex:pageblocksection>

<apex:pageblocksection title="Service Request Location">

</apex:pageblocksection>

<apex:inputTextArea id="caseInternalComments" >

</apex:pageblocksection>

<apex:pageblocksection title="Service Request Information" showheader="true" collapsible="true" columns="2">

**SR Sanitation Violation SPECEFIC FIELDS**

</apex:pageblocksection>

<apex:pageblocksection title="Description Information">

</apex:pageblocksection>

<apex:pageblock>

</apex:page>

**Triggers**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Trigger Name** | **Parent**  **Object** | **Child**  **Object** | **Trigger**  **Event** | **Operation**  **Type** | **Description** |
| CalculateBusinessHoursAges | Case |  | Before update | Insert | Calculates the total business hours between when a case was opened and when it was closed and then populates “Case Age in Business Hours” field, which is displayed in the “Age to Close in Business Hours” field shown within the “Resolution Information” section of the case |
| Account\_Name\_Update | Contact |  | Before update | Insert | When a new Contact is created during the case creation process, the system does not allow for an Account to be associated to the Contact, yet Account is a required field for a Contact. Whenever a new Contact is created without an Account, this trigger will associate the Account record with Name = “City of Philadelphia” to the Contact record |

**Apex Code:**

**Force.com sites:**

**Javascript:**

**Web Service/API Code:**

**Customer Portals:**

**Communities:** Community Partner Self-Service Portal

**Site.com:**

**Third Party Applications:**  Survey Force, Sales for Social Media & Call Center Console

**Other**

**Layout**

* **Layout:** TBD

Related Lists :

* Solutions
* Open Activities
* Activity History
* Case Comments
* Case History
* Attachments

# 4 – STANDARD CASE FIELDS

|  |
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| 4.1 DEPARTMENT DETAILS SECTION |

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Unique** | **Read Only** | **External ID** | **Validation** | **History** | **Comments** |
| Type | Type | Picklist  **Values:** Service Request Type, Information Request Type, Directory Services | N | Service Request Type | Y |  | N | N | None | Y | Field is initially auto-populated based on the Case Record Type being created. If this value is manually changed, it will result in a new Field Layout based on the new Case Record Type. |
| Department | Department\_\_c | Picklist  **Values:** Neighborhood Services | Y | Service Request Type | Y |  | N |  | None | N | Department will be automatically set based on Service Request Type. For an Information Request, this field will be automatically populated by the article. For Directory Services the field will default to 311 Services. |
| Service Request Type | Service\_Request\_Type\_\_c | Picklist  **Values:** Graffiti Removal | Y | Graffiti Removal | Y |  | N |  | None | Y | This field is initially auto-populated based on the Case Record Type chosen when creating the case. If this value is changed, it could result in a new Field Layout based on the new Case Record Type chosen.  If any value in the Other Case Information systems indicates that this should not be forwarded to another department as a Service Request, a value of “Request Not Required” will be assigned to this field, which will indicate that the Case should be closed upon save without being assigned to a queue. |

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| 4.2 CASE DETAIL/INFORMATION SECTION |

**NOTE :** Section Header has to be “Case Information” in the layout when case is created or opened for modification. Other wise, Section Header is “Case Detail” .

| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Unique** | **Read Only** | **External ID** | | **Validation** | **History** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Case Owner | Owner | Lookup(User,Queue) | N |  | N |  | N | N | None | | Y | When a case is created this field is set to the User creating the case. Upon save, the Standard Case Assignment Rule is executed and this field is updated to a Queue based on the case’s Service Request Type. Once the case is saved this field can be manually changed by a user. |
| Case Number | CaseNumber | Auto Number | N |  | N | Y | Y | N | None | | N | The system automatically populates this field when a case is created. |
| Caller Zip Code | Caller\_zip\_code\_\_c | Lookup(Contact) | Y |  | Y |  | N | N | None | | Y | This field will be populated by the Zip Code in the Contact record if one is associated with the case, otherwise the agent may populate it with a number from the caller. |
| Contact Name | Contact | Lookup(Account) | N |  | N |  | N | N | None | | Y | This field contains the Contact requesting the service. Ideally every case should have an associated contact. |
| Account Name | Account | Lookup(Account) | N |  | N |  | N | N | None | | N | This field contains the Account associated with the Contact record. |
| Parent Case | Parent | Lookup(Account) | N |  | N |  | N | N | None | | N | Two cases can be associated to each other via a parent/child relationship. This field identifies the “Parent” case. “Child” cases are displayed in the “Related Cases” Related List section for the “Parent” case. |
| Case Origin icon | Origin | Formula(Text) | Y |  | N |  | Y | N | None | | N | Shows an image representing the value in the Case Origin field. The formula for this field is: IMAGE(  CASE( Origin,  "Email", "https://<SalesforceOrg>.content.force.com/servlet/servlet.FileDownload?file=015K0000000238q",  "Phone", "https://<SalesforceOrg>.content.force.com/servlet/servlet.FileDownload?file=015K0000000238R",  "Web", "https://<SalesforceOrg>.content.force.com/servlet/servlet.FileDownload?file=015K000000023QL",  "/s.gif"),  "Origin Flag") |
| Contact Phone | ContactPhone | Phone | N |  | N |  | Y | N | None | | N | This display-only field is from the “Phone” field on the Contact record associated to the case. |
| Contact Email | ContactEmail | Email | N |  | N |  | Y | N | None | | N | This display-only field is from the “Email” field on the Contact record associated to the case. |
| Status | Status | Picklist  **Values:** On Hold, Escalated, Closed, New, In-Progress | N | New | Y |  | N | N | None | | Y | This required field defines the status of the case.   * “New” is the default value when creating a case. * All values except “Closed” are available when creating or editing a case.   “Closed” is the only value that can be selected when the “Close Case” button is used. |
| Case Origin | Origin | Picklist  **Values:** Email, Phone, Web | N | Phone |  | Y | N | N | None | | Y | This optional field provides the in-depth description of the case. |
| Priority | Priority | Picklist  **Values:** 1,2,3,4,5,6,7,8,9 | N | 5 |  | N | N | N | None | | N | This field allows a user to easily create a Comment while creating or editing a case. The data entered in this field will be used by the system to create a Comment record that will be displayed in the “Case Comments” Related List section of the case. |

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| 4.3 SERVICE REQUEST LOCATION SECTION |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Unique** | **Read Only** | **External ID** | **Validation** | **History** | **Comments** |
| Street | Street\_\_c | Text(255) | Y |  | N |  | N |  |  |  | Street of the Service Request Location. Also see Standard Workflow Rules. |
| City | City\_\_c | Text(255) | Y |  | N |  | N |  |  |  | City of the Service Request Location. Also see Standard Workflow Rules. |
| State | State\_\_c | Text(255) | Y |  | N |  | N |  |  |  | State of the Service Request Location. Also see Standard Workflow Rules. |

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| 4.4 CASE LOCATION SECTION |

Defined in GIS Integration Detailed Design Document.

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| 4.5 DESCRIPTION INFORMATION SECTION |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Read Only** | **External ID** | **Validation** | **History** | **Comments** |
| Subject | Subject | Text(255) | N |  | Y | N |  |  | Y | If this field is populated when creating a new case, the system will find and display Knowledgebase Articles using the content in the “Subject” field. |
| Description | Description | Long Text Area(32000) | N |  | Y | N |  |  | Y | This optional field provides the in-depth description of the case. |
| Internal Comments | Comments | Text Area(4000) | N |  | N | N |  |  | N | This field allows users to enter a Comment while creating or editing a case. Data entered in this field will be used by the system to create a Comment record that will be displayed in the “Case Comments” Related List section of the case. |

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| 4.6 RESOLUTION INFORMATION SECTION |

NOTE: Case Detail page have these fields only be populated if the case is “closed”.

| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Read Only** | **External ID** | **Validation** | **History** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Close Reason | Close\_Reason\_\_c | Formula (Text) Formula : TEXT(Reason) | Y |  | N | Y |  |  | N |  |
| Resolution Description | Resolution\_Description\_\_c | Formula (Text) Formula : TEXT(Issue\_Resolution\_\_c) | Y |  | N | Y |  |  | N |  |
| Date/Time Closed | ClosedDate | Date/Time | N |  | N | Y |  |  | N |  |
| Age to Close in Business Hours | Age\_to\_Close\_in\_Business\_Hours\_\_c | Formula(Number) | Y |  | N | Y |  |  | N | CalculateBusinessHoursAges trigger would update this field |
|  |  |  |  |  |  |  |  |  |  |  |

NOTE: Following fields is shown in Resolution Info section.

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Read Only** | **External ID** | **Validation** | **History** | **Comments** |
| Case Age in Business Hours | Case\_Age\_In\_Business\_Hours\_\_c | Number(15,3) | N |  | N | Y |  |  | Y | CalculateBusinessHoursAges trigger would update this field |
| Case Reason | Reason | Picklist Values: Emergency Call, Invalid, Other, Question Answered | N | Question Answered | Y | N |  |  | Y |  |
| Issue Resolution | Issue\_Resolution\_\_c | Text Area(255) | Y |  | N | N |  |  | Y |  |

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| 4.6 WEB INFORMATION SECTION |

NOTE: Section is shown only when the case is created through social media channels.

| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Read Only** | **External ID** | **Validation** | **History** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Web Email | SuppliedEmail | Email | N |  | N | Y |  |  | N |  |
| Web Name | SuppliedName | Text(80) | N |  | N | Y |  |  | N |  |
| Web Company | SuppliedCompany | Text(80) | N |  | N | Y |  |  | N |  |
| Web Phone | SuppliedPhone | Text(40) | N |  | N | Y |  |  | N |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 4.7 SYSTEM INFORMATION SECTION | | | | | | | |
| **Field Label** | **Field Name** | **Field Type** | **Custom** | **Default** | **Required** | **Read Only** | **External ID** | | **Validation** | **History** | **Comments** |
| Created By | CreatedBy | Lookup(User) | N |  | N | Y |  | |  | N |  |
| Last Modified By | LastModifiedBy | Lookup(User) | N |  | N | Y |  | |  | N |  |

Additional comments: