|  |
| --- |
| **Philly CRM 311**  **Technical Design – SR-LI23 Other Dangerous**  **V1.6** |
|  |

# REVISION HISTORY

|  |  |  |  |
| --- | --- | --- | --- |
| **Revision Number** | **Revision Date** | **Summary of Changes** | **Author** |
| 1.6 | 04/25/2014 | This document was created based off requirements document “SR-LI23 Other Dangerous Requirements Definition” | Anne Egan |

# 1 - TABLE OF CONTENTS

[REVISION HISTORY 2](#_Toc387246379)

[1 - TABLE OF CONTENTS 3](#_Toc387246380)

[2 – SERVICE REQUEST INFORMATION 4](#_Toc387246381)

[2.1 ENTITY RELATIONSHIP DIAGRAM 5](#_Toc387246382)

[2.1.1 CASE STANDARD FIELDS 5](#_Toc387246383)

[2.1.2 CUSTOM FIELDS 6](#_Toc387246384)

[2.1.3 Dependent Picklist 8](#_Toc387246385)

[2.1.4 Force.com Objects 8](#_Toc387246386)

[2.2 HIGH LEVEL SYSTEM PROCESS FLOW 9](#_Toc387246387)

[3 - NEW FUNCTIONALITY 10](#_Toc387246388)

[3.1 CONFIGURATION DETAILS 10](#_Toc387246389)

[3.2 DATA SHARING MODEL 13](#_Toc387246390)

[3.3 CUSTOM DEVELOPMENT DETAILS 13](#_Toc387246391)

[4 – STANDARD CASE FIELDS 17](#_Toc387246392)

[4.1 DEPARTMENT DETAILS SECTION 17](#_Toc387246393)

[4.2 CASE DETAIL/INFORMATION SECTION 17](#_Toc387246394)

[4.3 SERVICE REQUEST LOCATION SECTION 20](#_Toc387246395)

[4.4 CASE LOCATION SECTION 20](#_Toc387246396)

[4.5 DESCRIPTION INFORMATION SECTION 21](#_Toc387246397)

[4.6 RESOLUTION INFORMATION SECTION 21](#_Toc387246398)

[4.6 WEB INFORMATION SECTION 22](#_Toc387246399)

[4.7 SYSTEM INFORMATION SECTION 23](#_Toc387246400)

# 2 – SERVICE REQUEST INFORMATION

|  |  |
| --- | --- |
| **Case Record Type :** | Other Dangerous |
| **Service Request ID** | SR-LI23 Other Dangerous |
| **Service Request Type** | Other Dangerous |
| **Department** | License & Inspection |

|  |
| --- |
| 2.1 ENTITY RELATIONSHIP DIAGRAM |



|  |
| --- |
| 2.1.1 CASE STANDARD FIELDS |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **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:** High, Medium, Low | Yes | No | Medium | No | None | Yes |  |

|  |
| --- |
| 2.1.2 CUSTOM FIELDS |

| **Field Label** | **Field Name** | **Data Type** | **Required** | **Unique** | **Default Value** | **External ID** | **Rule #** | **History** | **Help Text** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Structure Collapsing | StructureCollapsing\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #1 | No | Is the structure collapsing? |
| Under Construction or Demolition | UnderConstructionorDemolition\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #2 | No | Is the building currently under construction or demolition? |
| Structure Type | StructureType\_\_c | Picklist  **Values:** Retaining Wall, Garage, Deck, Fence, Shed, Other | Yes |  |  |  | None | No | What type of structure is dangerous or unsafe? |
| Location of Dangerous Condition | Location of DangerousCondition\_\_c | Multi-Picklist  **Values:** Exterior, Interior, Front, Back, Left Side, Right Side | Yes |  |  |  | None | No | What is the location of the dangerous condition? |
| Vacant or Occupied | Vacant orOccupied\_\_c | Picklist  **Values:** Vacant, Occupied | Yes |  |  |  | None | No | Is the structure vacant or occupied? |
| L&I District | L&IDistrict\_\_c | Text(50) | Yes |  | This read-only field will be automatically populated from the GIS L&I District layer associated with the GIS record selected as the Service Request Location |  | None | No | The L&I district in which the property is located. |
| L&I Address | L&IAddress\_\_c | Text(100) | Yes |  | This read-only field will be automatically populated from the GIS L&I District layer associated with the GIS record selected as the Service Request Location. |  | Workflow Rule #3 | No | The L&I address key, based on the entered service address. |

|  |
| --- |
| 2.1.3 Dependent Picklist |

None.

|  |
| --- |
| 2.1.4 Force.com Objects |

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

|  |
| --- |
| 2.2 HIGH LEVEL SYSTEM PROCESS FLOW |



# 3 - NEW FUNCTIONALITY

|  |
| --- |
| 3.1 CONFIGURATION DETAILS |

**Case Record Type:**  *Other Dangerous*

Label: Other Dangerous

Support Process: Other Dangerous

Support Process Selected Values:

* New (Default)
* Open
* In-Progress
* Follow-up
* Closed

Record Type Name: Other Dangerous

**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 No** | **Rule Name** | **Workflow Action** | **Rule Criteria** | **Object** | **Evaluation Criteria** |
| 1 | Workflow Rule for *Structure Collapsing* | Hot transfer the customer to 911.  Close this case. | *Structure Collapsing* = ‘Yes’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 2 | Workflow Rule for *Under Construction or Demolition* | Display Message: “If the building is currently under construction or demolition, submit a Construction Site Task Force service request.”  Automatically change the *Case Record Type* to “Construction Site Task Force”. | *Under Construction or Demolition* = ‘Yes’ | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |
| 3 | Workflow Rule for *L&I* *Address (NULL)* | Display Message: “A zoning violation case can be submitted only if the exact L&I address key is validated.”  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”. | *Address Key* returned from GIS is NULL | Case | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. |

**Approval Processes:**  None

**Reports & Dashboards:** None

**Validation Rules**

None.

**Queue(s) :** L&I Contractual Services

311 Contact Center

**Queue Members :**

**L&I Contractual Services** - Hansen

**311 Contact Center** - None

**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)**:

|  |
| --- |
| * Purpose: To report a dangerous or unsafe garage, fence or retaining wall--including any structure aside from the main property at the address which is in danger of collapse, has collapsed and/or debris is falling. * Contact fields: Enter the name and phone number of the customer reporting the problem.   + Advise the customer that this information is requested in the event the department needs to obtain more information to follow up on this request.   + If the customer does not wish to leave their contact information, advise the customer that if the inspector cannot locate the issues identified, the case will have to be closed out.  Ask the customer, “Are you sure you want to submit this request anonymously?” * Service Address fields: Enter the property address.   + Verify that you entered the address correctly by repeating the address back to the customer.   + If the system is unable to locate the property address, advise the customer: “We cannot verify that address. Please call 911 immediately.” * Description field: Describe the dangerous and/or unsafe condition(s). This means the property has **STRUCTURAL** issues that could cause the detached garage, shed, fence or retaining wall to collapse.   + Examples: A customer reporting a property with a rear shed whose roof is collapsing. A customer reporting the wall that separates the alley from the rear yard has collapsed. * Advise the customer:   + For an interior residential inspection, an adult (over 18) must be present. The L&I inspector will use the customer’s contact information to schedule an inspection time if the customer requests an interior inspection.   + An inspection will occur within 15 business days.   If the property fails the inspection, violations are issued. |

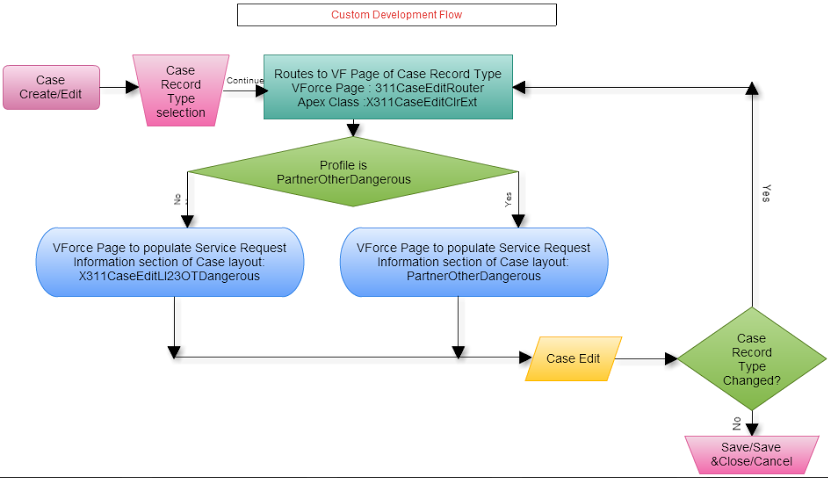
|  |
| --- |
| 3.2 DATA SHARING MODEL |

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

|  |
| --- |
| 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(X311CaseEditLI23OTDangerous or PartnerOtherDangerous)..
      3. Redirect to the page with parameters.

}

**Visual Force Page : X311CaseEditLI23OTDangerous**

<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 OTHER DANGEROUS 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 : PartnerOtherDangerous**

<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 OTHER DANGEROUS 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:** TBD

Related Lists :

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

# 4 – STANDARD CASE FIELDS

|  |
| --- |
| 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:** License & Inspection | 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:**  <> | Y | None | 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. |

|  |
| --- |
| 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. |

## 

|  |
| --- |
| 4.3 SERVICE REQUEST LOCATION SECTION |

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **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. |

|  |
| --- |
| 4.4 CASE LOCATION SECTION |

Defined in GIS Integration Detailed Design Document.

|  |
| --- |
| 4.5 DESCRIPTION INFORMATION SECTION |

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **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. |

|  |
| --- |
| 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 |  |

## 

|  |
| --- |
| 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: