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| **Philly CRM 311**  **Technical Design – Abandoned Bike**  **V1.8** |
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# REVISION HISTORY

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| --- | --- | --- | --- |
| **Revision Number** | **Revision Date** | **Summary of Changes** | **Author** |
| 1.8 | 02/25/2014 | This document is based off the requirements document “SR-ST05 Abandoned Bike Requirements Definition” | Anne Egan |

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# 2 – SERVICE REQUEST INFORMATION

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| **Case Record Type :** | Abandoned Bike |
| **Service Request ID** | SR-ST05: Abandoned Bike |
| **Service Request Type** | Abandoned Bike |
| **Department** | Streets |

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| 2.1 ENTITY RELATIONSHIP DIAGRAM |



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| 2.1.1 CASE STANDARD FIELDS FOR STREETS |

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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, Tagged 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 |  |

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| 2.1.2 CASE ADDITIONAL FIELDS |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Field Label** | **Field Name** | **Data Type** | **Required** | **Unique** | **Default Value** | **External ID** | **Rule #** | **History** | **Field Help Text** |
| Tagged With Yellow Alert Notice | TaggedWithYellow AlertNotice\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #1 and #2 | No | Is the bike tagged with a yellow alert notice? |
| Unusable | Unusable\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #2 | No | Is the bike in an unusable condition? |
| Missing or Damaged Parts | MissingorDamaged Parts\_\_c | Picklist  **Values:** Yes, No | Yes |  |  |  | Workflow Rule #2 | No | Does the bike have missing or damaged parts? |
| Time Locked in Same Location | TimeLockedinSameLocation\_\_c | Picklist  **Values:** Less than One Month, One Month or More, Not Locked | Yes |  |  |  | Workflow Rule #2 | No | Amount of time the bike has stayed in the same location |
| Locked To | LockedTo\_\_c | Picklist  **Values:** U-Rack, Meter-Rack, Sign Post, Other Post, Other | No |  |  |  | None | No | What is the bike attached to? |
| Locked to Other | LockedtoOther\_\_c | Text(100) | No |  |  |  | None | No | Describe what the bike is locked to |
| Color | Color\_\_c | Picklist  **Values:** Red, Black, White, Blue, Green, Yellow, Silver/ Grey, Other | No |  |  |  | None | No | Color of the bike |
| First Noticed | FirstNoticed\_\_c | Date | No |  |  |  | None | No | Approximate date the bike was first noticed |

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| 2.1.3 Force.com Objects |

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

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| 2.2 HIGH LEVEL SYSTEM PROCESS FLOW |



# 3 - NEW FUNCTIONALITY

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| 3.1 CONFIGURATION DETAILS |

**Record Types :** *Abandoned Bike*

**Case Record Type:** *Abandoned Bike*

Label: Abandoned Bike

Support Process: Case Support Process

Support Process Selected Values:

* Tagged - Owner Removed
* Tagged – City Removed

Record Type Name: Abandoned \_Bike

**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** | **Action** | **Rule Criteria** | **Object** | **Evaluation Criteria** |
| --- | --- | --- | --- | --- | --- |
| 1 | Workflow Rule for *Tagged With Yellow Alert Notice* | 1) Display message: “If a bike is already tagged with a yellow alert notice, the abandoned bike has already been scheduled for removal.”  2) Automatically set *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”. | *Tagged With Yellow Alert Notice* = ‘Yes’ | Case | Evaluate the rule when a record is created, and every time it’s edited. |
| 2 | Workflow Rule for Compliance Questions | If *Tagged With Yellow Alert Notice* = ‘No’ AND *Missing or Damaged Parts* = ‘Yes’ AND *Unusable* = ‘Yes’ AND *Time Locked in Same Location* = ‘More than One Month’:  1) Set *Service Request Type* to “Abandoned Bike”.  Otherwise:  1) Display message: “Abandoned bicycles are those with missing or damaged parts AND in an un-usable condition AND locked in the same location for one month or more.”  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”. | *Tagged With Yellow Alert Notice* = ‘No’ AND *Missing or Damaged Parts* is NOT null AND *Unusable* Is NOT null AND *Time Locked in Same Location* is NOT null | Case | Evaluate the rule when a record is created, and every time it’s edited. |

**Approval Processes:**

**Reports & Dashboards:**

**Validation Rules**: None

**Queues :** Abandoned Bike

311 Contact Center

**Queue Members :** TBD

**Public Groups:**

**Sharing Rules:**

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

**Custom Report Types:**

**Chatter Enabled Objects:**

**Documents And Attachments** :

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

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| * Purpose: To request the removal of bicycles that have been abandoned on public property. * Abandoned bicycles (also known as dead bikes) are those with missing or damaged parts **AND i**n an un-usable condition **AND** locked in the same location for one month or more. * Contact fields: Enter the customer’s contact information. * Service Address fields: Enter the address of the abandoned bike. * Description field: Identify the bike’s missing parts (wheel, chain, seat); broken parts (bent wheel, broken seat); and other identifiable parts (radio taped to handlebars, white basket in front). * Advise the customer:   + Many bicycle owners park their bicycles in the same location every day therefore repeated or continued appearance of a bicycle in one location is not sufficient evidence of abandonment.     - Abandoned bicycles will be removed 1 - 2 times per year (mid to late Spring &/or mid-Fall) over a 10 day period.     - MOTU staff will mark abandoned bicycles a Week and AFTER a week later, Streets department will remove the bike.   + Reports of abandoned bikes may be made at any time.   + Public notice will be posted through the Mayor’s Office of Transportation and Utilities (MOTU) website <http://phillymotu.wordpress.com/>.   + City is not responsible for reimbursing owners whose abandoned bicycles have been removed.     - All bicycles scheduled for removal from racks, posts or other structures will be tagged with an alert notice to the owner at least one week prior to the removal date. The tags are bright yellow in color and contain the following information: Side 1: Abandoned Bicycle Removal Notice along with the City seal; Side 2: Abandoned Bicycle Removal Notice— This bicycle has been identified as abandoned and will be removed.   + All removed bicycles will be donated to local charities for refurbishment.   + For any questions, call the Mayor’s Office of Transportation and Utilities at 215-686-9000.   + Constituent can take a picture of the bike and attach to case. |

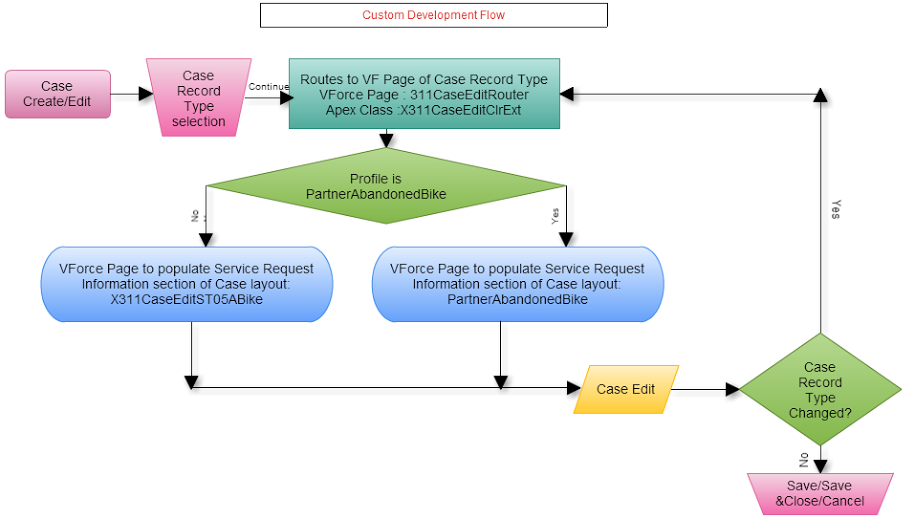
|  |
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| 3.2 DATA SHARING MODEL |

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| --- | --- | --- | --- |
|  | ***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(X311CaseEditST05ABike or PartnerAbandonedBike)..
      3. Redirect to the page with parameters.

}

**Visual Force Page : X311CaseEditST05ABike**

<apex:page standardcontroller="Case">

<apex:composition template="X311CaseEdit">

<apex:define name="typeSpecific">

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

**ABANDONED BIKE 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 : PartnerAbandonedBike**

<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">

**ABANDONED BIKE SPECEFIC FIELDS**

</apex:pageblocksection>

<apex:pageblocksection title="Description Information">

</apex:pageblocksection>

<apex:pageblock>

</apex:page>

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| --- | --- | --- |
| **Trigger Name** | **Object** | **Description** |
| CalculateBusinessHoursAges | Case | 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 | 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 Hampton” to the Contact record |

**Apex Code:**

**Force.com sites:**

**Javascripts:**

**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 :

* Articles
* Related Cases
* 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:** <> | Y |  | 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. Otherwise, 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 |

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **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 |  |

|  |  |  |  |  |  |  |  |
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| 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: