# Introduction

The Communities module of the Philly311 CRM Salesforce implementation will provide users, both citizens and employees of the city, with the ability to access and submit transactions in the Salesforce environment without utilizing a full Salesforce license. This document complements and supersedes [Philly311 – Requirements Definition Community Portal – User Workshop](https://xnet.unisys.com/sites/1392902/96506/Project%20Deliverables/Requirements%20Definition%20Documents/Philly%20311%20-%20Requirements%20Definition%20Community%20Portal%20-%20User%20Workshop%20.docx).

## Purpose

The purpose of this document is to record the functional requirements needed to successfully implement the Community Portal for Philly311 Neighborhood Liaisons and City of Philadelphia users.

## Scope

The City will utilize two Communities:

1. Neighborhood Liaison Community
2. Philly311 Internal User Community

The *Neighborhood Liaison Community* will be utilized by the Neighborhood Liaisons who are trained representatives for the communities in which they reside. Users of this community will have the ability to create Cases and view and edit the Cases that they created. The *Philly311 Internal User Community* will consist of employees of the city including, but not limited to, Department Supervisors, Police Officers, other Police Department employees, and City Case Workers. These users will have the ability to create and view Cases, limited to any restrictions enforced by their particular profile as documented in the [Philly 311 – Requirements Definition End User Profiles](https://xnet.unisys.com/sites/1392902/96506/Project%20Deliverables/Requirements%20Definition%20Documents/Philly%20311%20-%20Requirements%20Definition%20End%20User%20Roles%20Profiles.docx) document.

The Neighborhood Liaison community will be configured in Salesforce as Customer Community Portal and its users will be granted Customer Community licenses, and the Philly311 Internal User Community will be configured as a Partner Community and its users granted Partner Community licenses. For further clarification of the features available to Community license types, please refer to the SFDC document [Communities User Licenses](https://help.salesforce.com/HTViewHelpDoc?id=users_license_types_communities.htm&language=en_US).

## Definitions/Abbreviations

Case: Any customer contact with the 311 Contact Center. A Case will often result in a Service Request being created.

City-Wide Implementation: The production version of the Philly311 project which will include all of the defined functionality.

Neighborhood Liaison: A citizen who has volunteered to assist their community by reporting service request incidents and assiting other resididents in making service requests.

Philly311: A joint effort between Unisys and the City of Philadelphia to upgrade the City’s current 311 platform to utilize Salesforce’s improved functionality and capabilities.

Pilot Implementation: The initial implementation phase of the Philly311 project that will consist of a limited number of users and service requests, and will be implemented by a select group of users.

Profile: Defines the access a group of users has to Salesforce data and functionality.

Salesforce: A cloud-based solution being implemented as the platform for the Philly311 Solution.

Salesforce Service Could: A component of Salesforce focused on customer service and support.

Service Request: A Case that requires additional action by the City before it can be closed.

SFDC: Salesforce.com Inc., a global cloud computing company headquarterd in San Francisco, CA.

## References

[Communities User Licenses](https://help.salesforce.com/HTViewHelpDoc?id=users_license_types_communities.htm&language=en_US)

[Philly311 – Requirements Definition Community Portal – User Workshop](https://xnet.unisys.com/sites/1392902/96506/Project%20Deliverables/Requirements%20Definition%20Documents/Philly%20311%20-%20Requirements%20Definition%20Community%20Portal%20-%20User%20Workshop%20.docx)

[Philly 311 – Requirements Definition End User Profiles](https://xnet.unisys.com/sites/1392902/96506/Project%20Deliverables/Requirements%20Definition%20Documents/Philly%20311%20-%20Requirements%20Definition%20End%20User%20Roles%20Profiles.docx)

[Unisys 311 City of Philadelphia 311 Solution SOW](https://xnet.unisys.com/sites/1392902/96506/Project%20Management/Statement%20of%20Work/Exhibit%20A%20City%20of%20Philadelphia%20311%20Project%20SOW_v2-0_FINAL.docx)

[Supported Browsers](https://help.salesforce.com/HTViewHelpDoc?id=getstart_browser_overview.htm&language=en_US)

## Overview

The rest of this document describes the functionality that will be provided to users of the Salesforce Communities, as well as their restrictions and limitations. The content of these requirements have been compiled based on the workshops and demos that have been provided to the City, and have integrated feedback received at all of the sessions. Also included are the constraints and boundaries of the design, as well as assumptions that have been incorporated into the document. The concluding section lists all requirements specifically detailed in the RFP.

# General Description

## Perspective

Communities are a component of the Salesforce Service Could. Unisys will implement the Salesforce Service Cloud platform and the Community Portal for the City’s 311 contact center. Unisys will configure the Community Portal based on the City’s requirements as documented the SOW and any subsequent requirements defined in this document. Salesforce Knowledge, the knowledge base used to support the 311 Contact Center Agents, will also be used to support the users of the Community Portal. Addional security will be required to control the distribution of Knowledge Content as documented in Those users will not have access to the script flows utilized by agents

## Lifecycle

Unisys will activate a Community Portal in the following environments: (Note: A sandbox is an environment able to execute the Philly 311 solution for use in testing and development)

* Unisys will create one (1) Test and one (1) Development sandbox for testing and development purposes from the production environment
* Unisys will provide access to one (1) Production environment

The rollout of the Portal will take place in two (2) phases, in conjunction with the general rollout of the Philly311 CRM Project:

1. Pilot: For the Pilot, Unisys will configure or develop an interface to SFDC Community Portal. Unisys will deploy the same six (6) service request types designated for the general Philly 311 CRM Pilot implementation to the Community Portal. During the Pilot, the Community Portal will contain functionality for a maximum of fifteen (15) individual users.
2. City-Wide: Unisys will deploy nineteen (19) service request types to the Community Portal. The city will define the Case Types that will be exposed in the Community Portal for the citywide implementation. These should conform to the service requests existing on PublicStuff.

For more information on implementation phases, please refer to the [Unisys 311 City of Philadelphia 311 Solution SOW](https://xnet.unisys.com/sites/1392902/96506/Project%20Management/Statement%20of%20Work/Exhibit%20A%20City%20of%20Philadelphia%20311%20Project%20SOW_v2-0_FINAL.docx).

## Functionality

The functionality of the Community Portal will be focused on the ability for community partners to interact with the City, other community partners and constituents on various activities occurring in their individual neighborhoods and the City as a whole. The functionality available to users will be limited but similar to that available to City of Philadelphia Internal Users. This includes the ability to:

1. Submit a service request (requires login).
2. See a list of service requests submitted (requires login) in their area with contact information deleted or not displayed.
3. Check status of service requests submitted (requires login).
4. Comment on a currently open service request (requires login).
5. Close or cancel a service request (requires login).
6. Search the City’s knowledge base articles (requires login).
7. Contribute ideas (requires login).
8. Access reports & dashboards (requires login).
9. Request a password change.
10. Logout.

For the Pilot, Unisys will utilize the standard Salesforce.com user interface (UI) with minimal configuration by adding a logo and adding the City’s web-site style sheet.

Unisys will configure the Community Portal functionality using the core SFDC Community Portal platform. Unisys and the City of Philadelphia will update the user interface (UI) to a similar user interface as the City of Philadelphia’s web-site.

## Users

Users will fall into two (2) general classifications: Neighborhood Liaisons and Philly311 Internal Users.

### Neighborhood Liaisons

Neighborhood Liaisons are individuals who have volunteered to support their neighborhood by entering service request for themselves and on the behalf of other neighborhood residents. These individuals will be recruited by the Neighborhood Liaison Coordinators to participate in a special training session that will instruct them on how to use and reference the functions available to them.

These users will be limited to a specific subset of data within Salesforce, specifically to the Cases and Contact objects. In these they will be limited to the Cases that they have created, and will have access only to Contact information required to submit a Case on the behalf of another citizen. For Contact records, this would imply that they would only have access to the information provided in the Contact Name Lookup in the New Case edit.

### Philly311 Internal Users

Philly311 Internal Users are city employees that need limited access to the City’s Salesforce org in the course of performing their job functions. This access will include permissions not granted to Neighborhood Liaisons including expanded access to Cases, access to Reports and Dashboards, the ability to update the status of a case, and the ability to close a case. Their explicit permissions will be defined in [Philly 311 – Requirements Definition End User Profiles](https://xnet.unisys.com/sites/1392902/96506/Project%20Deliverables/Requirements%20Definition%20Documents/Philly%20311%20-%20Requirements%20Definition%20End%20User%20Roles%20Profiles.docx).

These users will receive expanded training in the use of Salesforce as it pertains to their needs and responsibilities. As city employees, they will be covered under the City’s global standards of confidentiality regarding information accessed in the use of the system.

## Constraints

The following constraints are inherent in the design of these requirements:

* Any user of the system will require standard internet access on a Salesforce supported browser. Required browsers may be downloaded, free of charge, from their respective vendors. For further information regarding browser requirements please refer to the SFDC document [Supported Browsers](https://help.salesforce.com/HTViewHelpDoc?id=getstart_browser_overview.htm&language=en_US).
* The Service Requests that can be created will be limited to the twenty-five (25) Case Types the City defines. Additional Service Requests may be requested using the Miscellaneous Case Type, but this will not result in a case that case being directly assigned to a city department (it will be evaluated by the Philly311 Team).
* The number of users and logins will be limited by the contract the city has currently negotiated and in place with SFDC.

## Assumptions

The following assumptions are being made in this document. Any change to these documents may require a change to this design and all technical design and development efforts resulting from it.

* The only citizens with access to Communities will be the Neighborhood Liaisons. Other citizens may report incidents using PublicStuff or by requesting the assistance of a Neighborhood Liaisons.
* Neighborhood Liaisons will have the training and ability to create cases that will be sent directly to the assigned department and / or integrated system. There will be no control imposed by the 311 Contact Center unless specifically designated in the Service Request Requirements.
* Neighborhood Liaisons may create Cases on behalf of other citizens, but will only be able to view cases which they created.

# RFP Requirements

The following requirements were specified in the Request for Proposal (RFP) that initiated this project. Every effort will be made to implement the following features and functions. If they are not implemented, due to other conflicting requirements or the lack of a business purpose, Unisys will make a reasonable explanation as to why that requirement was not met.

| **Reference Number** | **Service Request Requirements** | **Type** | **Implementation Plan** | **How Provided** | **Workshop Notes** |
| --- | --- | --- | --- | --- | --- |
| 1.21 | The solution provides an ability to recognize repeat callers/web users and assign unique identifier appropriately | N | **Repeat callers** will require CTI (**not in scope**). **Repeat web users** will be recognized by having users set up a unique login Id/pw that will be required for entry. The ability to recognize repeat web users will be configured in the Self Service (Community Portal) | SFDC Service Cloud | Reports may be configured which will identify high-volume users of the portal. |
| 1.40 | The solution provides ability to route a service request to an outside agency | F | SFDC Service Cloud application will be configured by creating workflow rules to route to an outside agency for service fulfillment. The outside agency will need a limited user license to edit and update the service requests. The Community Portal can be configured to allow outside agencies to see and edit service requests assigned to them. We will also configure routing of Service Requests to outside agencies via email if they are not set up in the system as Salesforce users. | SFDC Service Cloud | At the current time, no agencies outside the City of Philadelphia have been identified, but the functionality will exist. |
|  | The solution provides ability to accept requests or inquiries and track those requests in a single database or source from multiple channels, including: |  |  |  |  |
| 1.62 | Over the web | F | SFDC Service Cloud application (Community Portal) will be configured to implement this requirement | SFDC Service Cloud |  |
| 1.63 | Via smartphone | F | Users can use any supported browsers on a Smart Phone to access the Community Portal to access SFDC CRM application. Our solution does not include a native mobile version of the SFDC Service Cloud application. | SFDC Service Cloud |  |
| 2.01 | The solution provides ability for the City's public web site to interface to the CRM tool’s database so that constituents can access it via the web | CU | SFDC Service Cloud application will be configured by using the Community Portal functionality for the constituents to access the solution via the web, after they sign up for a user id and password. | SFDC Service Cloud | Further discussions will need to take place to determine how the portal will be integrated with the existing website. |
| 9.02 | The solution provides the ability for the constituent to have easy access to online publications and communication through blogs, wikis, searches and forums | F | SFDC Service Cloud application provides Sites pages as the means to publish CRM data and functionality to constituents. Searches and forums will be provided via the Community Portal. Blogs and wikis would require customization. The City and Unisys agree that blogs and wikis are not within the scope of the Project. | SFDC Service Cloud |  |
| 9.03 | The solution provides constituents and groups easily share events and news | F | SFDC Service Cloud application provides this functionality to constituents and groups via the Community Portal. | SFDC Service Cloud |  |