# Requirements Overview

**THIS DOCUMENT HAS BEEN SUPERCEDED BY THE** [**Philly 311 – Requirements Definition Communities**](https://xnet.unisys.com/sites/1392902/96506/Project%20Deliverables/Requirements%20Definition%20Documents/Philly%20311%20-%20Requirements%20Definition%20Communities.docx) **document.**

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

# Workshop Location and Time: 23 January 2015; City Hall Conference Room 153

# Workshop Attendees:

* Rosetta Lue
* Kimberly Adams
* John Farrell
* Ade Fuqua
* John Kelly
* Elizabeth Martens
* Graham Quinn
* Daniel Ramos
* Clinton Johnson
* Sheryl Johnson
* Michael Schmidt
* Sreelatha Susheela Kenchappa

# Requirements

**Pilot**

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

Unisys will implement the SFDC 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 definition sessions.

Unisys will deploy the same six (6) service request types designated for the Pilot implementation to the Community Portal.

The knowledge base used to support the 311 contact center agents will also be used to support the community partners/constituents using the Community Portal. Those users will not have access to the script flows utilized by agents.

For the Pilot, Unisys will configure or develop an interface to SFDC Community Portal.

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 the area. The Community Portal is a combination of the Salesforce.com Customer Community or Partner Community and the other functionality implemented on the Salesforce platform. The community partners will be able to enter a service request anonymously or may register on the site to provide the ability to return to the site for status updates or additional comments. The “Community” component of Salesforce.com will be used to implement this function.

The Community Portal will contain functionality for a maximum of fifteen (15) individual users. During the project, the City and Unisys will finalize Community Portal design. For example:

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.

**Citywide Implementation**

Unisys will deploy nineteen (19) service request types (a subset from the Table 2 - List of Service Request Type (in addition to those already implemented in Pilot Phase) shown in this section) to the Community Portal. The city will define the service request types that will be implemented in the Community Portal for the citywide implementation.

Unisys will enhance the existing Community Portal created during the Pilot by configuring the Community Portal to support the additional capabilities described in this Section. The citizen will be able to submit a new service request via a web-based portal. During design, the City and Unisys will finalize the functionality provided by the Community Portal and the level of access. An example of functionality includes:

1. Ability for a citizen to submit a service request without registering on the site.
2. Ability for a citizen to register on the site and allow for registered citizen to the site to check the status of service requests submitted.
3. Ability for a citizen to see a list of service requests submitted by them(requires login)
4. Ability for a citizen to check status of service requests submitted by them (requires login).
5. Ability for a citizen to comment on a currently open service request that was previously submitted by them (requires login).
6. Ability for a citizen to close or cancel a service request that they have previously submitted (requires login).
7. Ability to search the knowledgebase.
8. Contribute ideas (requires login).
9. Access reports & dashboards (requires login).
10. Ability for a citizen to request a password change.
11. Ability for a citizen to logout.

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.

| **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 |  |

# Action Items – The City

* The City will update the existing City web-site with the URL link to the Community Portal.
* Citywide The City of Philadelphia will provide Unisys with a web-site style sheet file (css) for the Community portal prior to the design meeting.
* Citywide Implementation: The City of Philadelphia will modify the City’s current website with the Community Portal URL.

# Action Items – Unisys

* Validate the Philadelphia “ORG” was created by SFDC (Salesforce.com) with the Service Cloud module and the Community Portal.
* Test access to the Service Cloud and Community Portal.
* Develop, distribute and review a Business Configuration Design Document. The Business Configuration Design Document details the design of the SFDC Service Cloud platform and the Community Portal for the City of Philadelphia including the service requests, agent scripts, screen mock up, etc.
* Configure the SFDC Service Cloud platform and Community Portal per the approved Business Configuration Design Document including:
  + Core SFDC Service Cloud platform Configuration
  + Service Request Types
  + Organizational Structure (Departments/Groups/Queues)
  + Agent Scripts
  + Email Templates
  + Users, User Profiles, & User Roles based on the user role table in Appendix E – User Role
* Develop, distribute and review a Business Configuration Design Document. The Business Configuration Design Document details the design of the SFDC Service Cloud platform and the Community Portal for the City of Philadelphia.
* Configure the SFDC Service Cloud and Community Portal per the approved Business Configuration Design Document including:
  + Core SFDC Service Cloud Marketing Campaign Configuration
  + Email Templates
  + Users
* Resolve significant Deviations from the Design Document that arise from the testing for those Service Requests and Interfaces that are designated as the responsibility of the Unisys staff. This will consist of:
  + Validation of Service Request via Community Portal
* Citywide Implementation: Enhance the Community Portal to include the additional Service Requests for Citywide implementation
* Citywide Implementation: Develop, distribute and review Integration Design Document (enhanced from the previous version developed for the Pilot solution with the following topics)
  + Community Portal Design Document
* Citywide Implementation: Develop and unit test each channel configuration and integration
  + Community Portal Configuration
* Resolve significant Deviations from the Design Document that arise from the testing for those Service Requests and Interfaces that are designated as the responsibility of the Unisys staff. This will consist of:
  + Validation of Service Request via Community Portal