# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 08/22/2015 | Requirements document for IR and SR | S.Brindha/ Sreelatha SK |
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# Requirements Overview

The purpose of this document is to record the functional requirements needed to successfully develop a new directory service.

# Requirements

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| **Department** | Directory Assistance |
| **Type** | Directory Services |
| **Record Type Name** | Directory Assistance |
| **Record Type Description** | Record Type for creating information request for Directory Assistance. |
| **Service Request Type** | Directory Assistance - SR |
| **Process Overview** | 1. Constituent requests the service 2. The Agent creates a case by selecting the *Directory Assistance* ***Record Type***.    1. The system displays a screen that has a ***Page Layout***, a ***Flow*** (agent script), and the ***Suggested Articles sidebar*** configured components:       1. The ***Page Layout*** associated with the *Directory Assistance* ***Record Type*** is being shown in the middle panel. This section shows the optional and mandatory data the agent needs to supply in order to create the case.       2. The ***Flow*** associated with the ***Page Layout*** is shown in the left panel. The flow is used to help an agent successfully step through the call taking process.       3. The ***Suggested Articles sidebar*** is being shown in the right panel. Articles display based on any matching words typed in the “Subject” field on the case.    2. The agent enters the required and optional data displayed for the specific Record Type selected. 3. When the agent saves the case, the system:    1. Auto-generates the next sequential Case Number    2. Associates the ***Contact*** record and related ***Account*** record to the case    3. Assigns the “New” case to the *Queue* representing the group of users responsible for resolving this type of service request (see Assignment Queue).       1. Assignment notification emails will NOT be sent for cases that are being interfaced with Hansen.    4. Sends an email to the contact indicating a new case has been created for their request if the “Send Notification Email to Contact” checkbox is selected. The standard “Case Creation” template will be used for the email. |
| **Default Settings for Standard and Custom Fields** | As indicated in the “Service Requests Standards” document, the following picklist values will be configured as the default values for the designated standard and custom case fields:   |  |  |  | | --- | --- | --- | | **Field Label** | **Standard List of Values** | **Default Value for New Case** | | Status | New, In-Progress, and Open | New | | Case Origin | Phone, Email, Web, Facebook, Twitter, Mobile, Text, Communities, Fax/Email, Walk In Center | None | |
| **Service Request Types and SLAs** | As indicated in the “Service Requests Standards” document, each Case Record Type will be associated to one or more Service Request Types. If there is only one value, it will be selected by default otherwise there will not be a default. Below, please define the Service Request Type values for this case:   |  |  |  |  | | --- | --- | --- | --- | | **Service Request Types** | **SLA Number (e.g. 1, 2, 3, …)** | **SLA Type  (Hours, Business Hours, Days, or Business Days)** | **Interface** | | Directory Assistance | None | None | None |   **NOTE: If the Case Record Type has one and only one Service Request Type the system will populate the Service Request Type when the New Case page is displayed.  If the Case Record Type has more than one Service Request Type the system will populate the Service Request Type via a workflow rule based on how the agent populates one or more fields.** |
| **Assignment Queue** | As indicated in the “Service Requests Standards” document, each Service Request Type is assigned to a Queue, representing the group of users responsible for resolving that type of request for service. If this type of service request follows the standard assignment methodology, please complete the following information:   |  |  |  | | --- | --- | --- | | **Service Request Types** | **Queue Name** | **Queue Members** | | Directory Assistance | Directory Assistance | None |   If this type of case does not follow the standard assignment methodology, please describe how the case should be assigned and who the case should be assigned to: NOT APPLICABLE |
| **Additional Case Fields** | The standard and custom case fields described in the “Service Requests Standards” document will be available for all cases. If this type of service request needs any other fields, please enter them below:.  **NOTE: There are no additional case fields, validation rules, or workflow rules for Miscellaneous service requests. Information is submitted only in the standard Salesforce service request fields.**  **Additional Information section**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Field Label** | **Field Type** | **Required** | **Rule #** | **History** | **Field Help Text** | |  |  |  |  |  |  |   **Validation Rules**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** | **Comments** | |  |  |  |  |  |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | |  |  |  |  |  |  | |
| **Escalation Rule** | TBD |
| **Agent Instructions** | Purpose: To report to the Directory Assistance Inquiry Request  Contact fields: Enter the name and contact information of the customer reporting the issue.   * 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 an 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?”   Comments field: Describe the Contacts details requested by the caller in detail.  Advise the customer:   * Provide the caller with the information from the Directory Contact Details to answer the caller's inquiry.   Directory Contact Details Not Found:   * The request will be submitted to the proper department and investigated. |
| **Profiles** | Case Record Type will be made available to the “311 Agents”, “311 Supervisors”, “Case Workers”, and “SFDC Administrators” Profiles.  **Note**: Profile definitions for the City have not been determined. Profiles above are for reference. |
| **Support Process Values** | New, In-Progress, and Open |
| **ESRI/GIS Information** | None |
| **Other Information** | None |
| **Actions** | None |

# Approvals after Requirements Definition Workshop

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| --- | --- | --- |
| **Date** | **Approver Name** | **Approver Signature** |
|  | Graham Quinn  Sheryl Johnson |  |
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