

**Salesforce.com SR Data Import Functional Design Document**

Version 1.4

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**Revision History**

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| --- | --- | --- | --- |
| Version | Date | Author | Summary of Changes |
| 1.0 | 2/21/2014 | Sreelatha SK | Initial draft |
| 1.1 | 2/28/2014 | Sreelatha SK | Fix for comment given by Clinton |
| 1.2 | 4/17/2014 | Sreelatha SK | Added fields based on 2014 dump |
| 1.3 | 5/3/2015 | Sreelatha SK | Added datetime fields for   * CASE\_DATE\_EDIT * CASE\_DATE\_COMPLETED |
| 1.4 | 7/23/2015 | Sreelatha SK | Updated the assumptions as per .test sandbox import |
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# Overview

This document defines the data import strategy for loading historical service request records data into the Salesforce platform from Novo. City will provide the service request records data from one source in a comma-separated value file format. Unisys will import approximately four million (4,000,000) Novo requests from a comma-separated value file.

# Pilot Implementation

## Goal

The business goal being addressed by this document:

1. The ability to import service request data from the existing City’s NOVO database into corresponding Case records within Salesforce.

## Process

The steps needed to accomplish the Service Request records import are:

1. Unisys creates the fields required for importing Service Request records.
2. Unisys will provide the City with a data file template for importing Service Request records into Salesforce.
3. Unisys will develop the data importing script to import the Service Request records into Salesforce.
4. Unisys verifies the contact import template provided by the city and changes the column names (if required only) before importing.
5. Test Import:
   * Unisys creates a **official**.csv (comma separated value) file that contains a “header” record that defines the Case Object fields and a couple of “detail” records that provide example data that simulates the data expected on an Case record from the City’s existing NOVO database application.
   * Unisys imports **official**.csv file into the Philly Sandbox to ensure the data loads properly
6. Final Import:
   * After the Test Import, and verification of the sample records imported. The complete records from the NOVO database will be imported to Philly Sandbox environment.

# Assumptions

The following table defines the assumptions of conditions that must be true for a successful implementation:

| **Assumption #** | **Assumption Description** | **Comments** |
| --- | --- | --- |
| ASSUMP1 | City has to provide Unisys this data from one source in a comma-separate value (csv) file format |  |
| ASSUMP2 | Unisys will load a total combined maximum four million (4,000,000) Service Request records from the csv file provided by the City into Salesforce |  |
| ASSUMP3 | Unisys will not validate or clean the data provided by City. | The City of Philadelphia will be responsible for cleansing the service request and constituent data prior to migrating into the Salesforce platform. |
| ASSUMP4 | The City of Philadelphia will validate the service request records were imported into the production instance of the Salesforce platform. |  |
| ASSUMP5 | The dump import issues reported in below table (ASSUMP5) are updated in the dump as agreed with Philly team | Service Request dump modifications |
| ASSUMP6 | The dump was mapped for Contact record with below assumptions as agreed with Philly team.  Regarding **Contact** – The non-matching records for EMAIL and PHONE were loaded to System and then Service Request records were mapped for these new records.   * Email & Phone matched contact records – 8124 * Anon Anon Contacts (for blank data) – 2872 * New Contacts Inserted (which had valid information like Email/Phone/Address/Name) - 36750 |  |

Table (ASSUMP5)

|  |  |  |
| --- | --- | --- |
| **Service Request (Case)** Record**/ Dump** fields (**No** of Records) | **Issues Notes** | **Corrective Action from Unisys** |
| CASE\_TITLE (**1**) | This field should not be blank but blank for **1** Record | The blank one was replaced with “Service Request Type” field value. |
| CASE\_DESCRIPTION (**115**) | This field should not be blank but blank for **115** Records | Blank one was replaced with “None”. |
| Template Title (**7854**) | For **5102** Records, value is “Smoke alarm” instead of “Smoke Alarm” | Unisys corrected to “Smoke Alarm” |
| For **2164** Records, value is “Public site” instead of “Public Site” | Unisys corrected to “Public Site” |
| For **588** Records, value is “Fire Referrals” which is not present in Salesforce to map | Unisys added “Fire Referrals” in picklist value for “Template” picklist field. |
| Status Title (**14**) | For **1** Record, value is “Corrected - Needs Approval” instead of “Corrected-Needs Approval” | Unisys corrected value “Corrected - Needs Approval” to “Corrected-Needs Approval” |
| For **11** Records and **2** Records, value is “Reassigned” and “Reclassified” which are not present in Salesforce to map | Unisys added “Reassigned”, “Reclassified” to “Sub-Status” picklist field. |
| DEPART (**36**) | For **34** Records of type “Miscellaneous” have value “Office of Innovation and Technology- OIT” which is not present in Salesforce to map | Unisys modified value to “Philly311 Contact Center” department for Miscellaneous SR type. |
| For **2** Records, SR type is “Maintenance Residential” but the Department is “Streets”, which is not correct mapping. | Unisys modified value to “License & Inspection” department for “Maintenance Residential” SR type. |
| Service Request Type (**1858**) | For **3** Records, SR type is “Building Dangerous Historical” which is not present in Salesforce to map | SR was mapped to “Maintenance Residential” as per Graham suggestion. |
| For **104** Records, SR type is “Building Construction” which is not present in Salesforce to map    **Note**: Some records have Case Record type (CR) and Service Request type (CR) value interchanged, like SR value is “Building Construction” and CR value is “Zoning Construction” but it should vice versa | Unisys swapped the value for Case Record and Service Request Type. |
| For **101** Records, value is “Newsstand/Outdoor Cafe” instead of “Newsstand Outdoor Cafe” | Unisys corrected to “Newsstand Outdoor Cafe” |
| For **159** Records, SR type is “Parks and Rec Safety and Maintenance” which is not present in Salesforce to map | Need input from Philly team |
| For **1489** Records, value is “Vacant Lot Clean-up” instead of “Vacant Lot Clean-Up” | Unisys corrected to “Vacant Lot Clean-Up” |
| Case Record Type (**1779**) | For **101** Records, value is “Newsstand/Outdoor Cafe” instead of “Newsstand Outdoor Cafe” | Unisys corrected to “Newsstand Outdoor Cafe” |
| For **189** Records, value is “Rubbish/Recyclable Material” instead of “Rubbish/Recyclable Material Collection” | Unisys corrected to “Rubbish/Recyclable Material Collection” |
| For **1489** Records, value is “Vacant Lot Clean-up” instead of “Vacant Lot Clean-Up” | Unisys corrected to “Vacant Lot Clean-Up” |
| Type (**47782**) | All **47782** Records, value is “Service Request” instead of “Service Request Type” | Unisys corrected the value to “Service Request Type” |
| Customer Last Name (**5**) | For **5** Records, Max length of the value in the dump is 30, but Salesforce field can max store 20 characters only. | Unisys increased the length of the customer\_Last\_Name\_\_c field to 30. |
| Work Completed (**47782**) | All **47782** Records, has value in the format as dd/mm/yyyy instead of yyyy-mm-dd | Unisys corrected to yyyy-mm-dd format |
| Errors Found (**44648**) | For **8452** Records, value is “TRUE” instead of “True” | Unisys corrected to “True” |
| Hansen Request ID | For Records with value “1” for Hansen Request ID is replaced with null |  |

# SalesForce Object: Case

This section defines the field requirements to create the Case records. In addition, the table provides the field format and structure details, which controls the display of these within the Salesforce.

Note: The basic fields of the Case records mentioned in below table may change during actual implementation phase based on City’s (Philly) requirements.

|  |  |  |  |
| --- | --- | --- | --- |
| **Field Label** | **Field Type** | **Standard  or Custom** | **Comments** |
| 50 or older | Picklist  Values: Yes, No | Custom | No data in template |
| Account Name | Lookup(Account) | Standard | Account for Contact on case |
| Article Maintenance Required | Text(255) | Custom | No data in template |
| Business Days | Number(3) | Custom | Specifies the number of days within which Service Request should be closed. |
| Caller Zip Code | Text(50) | Custom | Zip code of the Caller/ Service Request location Zip locationk |
| Case Origin | Picklist Values: Email, Phone, Web | Standard | Indentifies the Source of the Service request. |
| Case Reason | Picklist | Standard | Identifies the reason a case was closed. |
| Category | Text(255) | Custom | Specifies value of [Type/Department/CaseRecordType] of the SR |
| Comments and links | Text | Custom | Comments and Links associated with the Service Request. |
| Contact Email | Email | Standard | From Contact record |
| Contact Phone | Phone | Standard | From Contact record |
| Contact Type | Text(255) | Custom | No data provided in template |
| Content Accuracy | Picklist Values: Content Accurate No Review Required - DIRECTORY ASSISTANCE ONLY REVIEW NOT REQUIRED | Custom | Identifies the accuracy of the data of the Service  Request |
| Content Type | Text(255) | Custom | No data |
| Council District | Text(255) | Custom | Council District to which Service Request belongs to. |
| Customer Address | TextArea(255) | Custom | Mailing address of the customer |
| Customers First Name | Text | Custom | First Name of the customer who has submitted service request. |
| Customers Last Name | Text | Custom | Last Name of the customer who has submitted service request. |
| Days Overdue | Number | Custom | Number of Days Post Business Days |
| Department | Picklist | Custom | Department to which the Service Request belongs to. |
| Description | Long Text Area(32000) | Standard | Description of the Service Request. |
| Email Received | DateTime | Custom | Identifies the Date and time when email was received |
| Entry Delay | Picklist Values: 0-4 | Custom | Specifies the delay in taking a Service Request |
| Errors Found | Picklist Values: True, False | Custom | Indicates the error found in Service Request. |
| Full Name | Text | Custom | Full Name of the customer who has submitted service request. |
| Hearing impaired? | Picklist Values: Yes, No | Custom | No data in template |
| Identified By | Text(255) | Custom | Applicable to Police Department Requests |
| Issue Resolution | TextArea(255) | Custom | Resolution information of the Service Request. |
| Language Needed | Text(255) | Custom | Indicates the language preferred by the caller/customer |
| LI Request | Text(255) | Custom | Request Brief description |
| Location | Geolocation | Custom | Holds the Latitude and longitude values of Service Request Location |
| Novo Added Date | DateTime | Custom | Date Time when SR was created. |
| Novo Assigned Date | DateTime | Custom | DateTime when SR was assigned. |
| Novo DueDate | DateTime | Custom | DateTime when Service Request should be closed. |
| Novo Date Edited | DateTime | Custom | Date Time when Novo ticket was edited. |
| Novo Date Completed | DateTime | Custom | Date Time when SR was closed. |
| Novo Priority | Text(20) | Custom | Priority of the Novo Case. |
| Novo Created By | Text(255) | Custom | Name of person who created the case |
| Own or Rent | Picklist Values: Yes, No | Custom | No data in template |
| Pending Comment | Text | Custom | No data in template |
| PhillyRising | Text(255) | Custom | Identifies the Philly rising Area to which Service Request belongs to |
| Police District | Text(255) | Custom | Police District to which Service Request belongs to |
| Priority | Picklist | Standard | Specifies the priority level of the Service Request. |
| PSA | Number | Custom |  |
| RecordType Name | Lookup | Standard | Case Record Type of the Service Request |
| Ref End | Text(255) | Custom |  |
| Ref Start | Text(255) | Custom | No data in template |
| Referred to | Text(255) | Custom | No data provided in template |
| Resolved First Call | Checkbox | Custom | Indicates if Service Request was resolved in First Call. |
| Status | Picklist Values: On Hold, Escalated, New, Closed, In-Progress | Standard | When creating or editing a case "Closed" is not in the picklist values. When closing a case "Closed" is the only value in the picklist. |
| Street | Text(255) | Custom | Street Location of the Service Request |
| Subject | Text(255) | Standard | Brief Detail on the Service Request |
| Sub-Status | Picklist | Custom | Status of the Service Request. |
| Tag | URL | Custom | Article/Service Request relevant to the current Service Request. |
| Template | Picklist | Custom |  |
| Ticket Number | Text(15) | Custom | Unique Id associated with SR |
| Type | Picklist Values: Service Request Type, Information request Type, General Information, Directory Assistance, Opinion(Including complaints) | Standard | Refers to the Type of the Service Request. |
| Type of error found | Text(255) | Custom | Description of the error found |
| Vacant Lot Zip Code | Text(50) | Custom |  |
| Novo Work Order Ref | Text(255) | Custom | reference ID associated with Service Request |

## Case Mapping

|  |  |  |
| --- | --- | --- |
| **Novo Field Name** | **Salesforce Field Name** | **Salesforce field Type** |
| CASE\_ID | Novo Ticket | Custom text field (Unique) |
| CASE\_TITLE | Subject | Standard text field |
| CASE\_DESCRIPTION | Description | Standard text area field |
| CASE\_RESOLUTION | Case Resolution | Standard text area field |
| CASE\_DATE\_ADD | Novo Added Date | Custom Date/Time field |
| CASE\_DATE\_EDIT | Novo Date Edited | Custom Date/Time field |
| CASE\_DATE\_ASSIGN | Novo Assigned Date | Custom Date/Time field |
| CASE\_DATE\_COMPLETED | Novo Date Completed | Custom Date/Time field |
| CASE\_DATE\_DUE | Novo Due Date | Custom Date/Time field |
| RESOLVED\_FIRST\_CALL | Resolved First Call | Standard Checkbox field |
| CATEGORY\_NAME |  |  |
| PRIORITY\_NAME | Novo Priority | Custom Picklist field |
| TEMPLATE\_TITLE | Template | Custom Picklist field |
| ACCOUNT\_NAME |  |  |
| Account ID | Account | Standard(lookup) |
| CONTENTTYPE\_NAME | Content Type | Custom Text field |
| STATUS\_TITLE | Sub-Status | Custom Picklist field |
| UserFullName | Novo Created By | Custom Text field |
| Content Accuracy | Content Accuracy | Custom Picklist field |
| Work Order Reference Number (Streets, FP,L&I, PWD) | Novo Work Order Ref | Custom Text field |
| L&I ID | Hansen Request ID | Custom Text field (External ID) |
| Streets ID | Streets Request ID | Custom Text field (External ID) |
| Water ID | Water Request ID | Custom Text field (External ID) |
| Contact Type | Type of Contact | Custom Picklist field |
| Contact ID | Contact | Standar(lookup) |
| Customers First Name | Customers First Name | Custom Text field |
| Customers Last Name | Customers Last Name | Custom Text field |
| Street Location | Address/Intersection | Custom Text field |
| e-mail address | Email | Custom Email field |
| Contact Number | Phone | Custom Phone field |
| Type of Contact | Origin | Standard Picklist field |
| Customers Address | Customers Address | Custom TextArea field |
| Council District | Council District | Custom Picklist field |
| Resolution to Contact | Resolution to Contact | Custom TextArea field |
| Referred to | Referred to | Custom Text field |
| Primary Reason For Call |  |  |
| Zip Code | ZipCode | Custom Text field |
| Work Completed | Work Completed | Custom Date field |
| Business Days | Business Days | Custom Number field |
| Entry Delay | Entry Delay | Custom Picklist field |
| LI Request | LI Request | Custom Text field |
| Identified By (Police Dept. Only) | Identified By | Custom Text field |
| PSA (Police Dept. Only) | PSA | Custom Text field |
| Errors Found | Errors Found | Custom Picklist field |
| Vacant Lot Zip Code | Vacant Lot Zip Code | Custom Text field |
| Type of error found | Type of error found | Custom Text field |
| Email Received | Email Received | Custom Date/Time field |
| Language Needed | Language Needed | Custom Text field |
| Police District | Police District | Custom Text field |
| Article Maintenance Required | Article Maintenance Required | Custom Text field |
| Lat | Centerline.Latitude | Custom Geocode field |
| Long | Centerline.Longitude | Custom Geocode field |
| Ref Start | Ref Start | Custom Text field |
| Ref End | Ref End | Custom Text field |
| PhillyRising | PhillyRising | Custom Text field |
| Own or Rent | Own or Rent | Custom Picklist field |
| 50 or older | 50 or Older | Custom Picklist field |
| Hearing impaired? | Hearing Impaired | Custom Picklist field |
| Comments and links | Comments and links | Custom Text field |
| PublicStuffID | Customer Request ID | Custom Text field (External ID) |
| Pending Comment | Pending Comment | Custom Text field |
| Tag | Tag | Custom URL field |
| Business Hour ID | BusinessHour | Standard(lookup) |
| ByPass VR WF | ByPass VR WF | Custom Checkbox field |
| Type | Type | Custom Picklist field |
| Case Record Type | Case Record Type | Custom Picklist field |
| Record Type ID | Record Type | Standard(lookup) |
| Service Request Type | Service Request Type | Custom Picklist field |
| Redress Case | Redress Case | Custom Checkbox field |
| Status | Status | Standard Picklist field |

# Issues

The following defines the Issues for Data Import of Service Request records to Salesforce.

| **Rule #** | **Issue Description** | **Comments** |
| --- | --- | --- |
| ISSUE001 | The Contact in the dump provided is already present as Contact records under the Contact Object. | Contact is the lookup field. |

# Verification of the Imported Records

This section defines the requirements needed to verify the imported Service Request records.

* Verify the “Number of the records” imported are same as number of the records in the import file.

# City Action Needed

The following table describes the actions the City needs to perform for a successful implementation of the functionality being requested:

| **Action #** | **Action Description** | **Action Owner** |
| --- | --- | --- |
| ACT001 | The City will “cleanse” the Case records that will be imported into Salesforce by **<Date to be specified>**. |  |
| ACT002 | On **<Date >** the City will provide the “official”.csv file that contains the “header” record and a “detail” record for each Service Request record from the Call Center’s NOVO database that the City wants imported into Salesforce and sends the file to the Unisys BA via email, who will forward it to the Unisys Development Team. |  |
| ACT003 | The City of Philadelphia will be solely responsible for backing up the data on Salesforce. Unisys will not be responsible for any destruction or loss of data; except to provide reasonable assistance with re-loading the data if provided by the City in the necessary formats from the City’s backups. |  |
| ACT004 | “Account Name” to be replaced with General Citizen for all the records which had account name different than *General Citizen* |  |
| ACT005 | Zip Code with  value “Declined to Answer” and “Non Resident” to be replaced with blank |  |
| ACT006 | Invalid Email address to be modified accordingly |  |

# Case Records Import template

The Case records from the data dump will be imported to Case object in Salesforce. The import template is attached below for reference.

