# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/31/2014 | Initial Draft Before Workshop | Sreelatha SK |
| 1.1 | 02/10/2014 | Minor Edits. | J. Kelly |
| 1.2 | 02/18/2014 | Design-Related Revisions. | J. Kelly |
| 1.3 | 03/032104 | Added ESRI/GIS Information and Actions sections and information highlighted in blue. | J. Kelly |
| 1.4 | 03/03/2014 | Revisions Based on Requirements Workshop | J. Kelly |
| 1.5 | 03/13/2014 | Revised “Residence Type” and "Disabilities/Language Information" fields, and added "Installation time" field based on Michael Richey’s 03/04/14 email. Added “Residence Type” field and workflow per Michael Richey’s second 03/03/14 email. | J. Kelly |
| 1.6 | 04/07/2014 | Added Graham’s Quinn’s response to Action Item #1. | J. Kelly |
| 1.7 | 07/04/2014 | Added changes for Installation Time field | Sreelatha SK |
| 1.8 | 08/08/2014 | Updated based on follow-up session | M. Schmidt |
| 1.9 | 08/08/2014 | Updated default field settings and support process | M. Schmidt |
| 1.10 | 08/13/2014 | Updated Workflow Rule #2 | M. Schmidt |
| 1.11 | 10/18/2014 | Updated Workflow Rule #2 action w.r.t Support Case # 05012267, 05012263 | Sreelatha SK |

# Requirements Overview

The purpose of this document is to record the functional requirements needed to successfully develop a new service request. Certain standards have already been defined to record and resolve service requests received by the City, which should be followed as much as possible when defining the requirements for a new service request (see **Service Requests Standards** document).

# Requirements

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| **Department** | Fire Department |
| **Record Type Name** | Smoke Detector |
| **Record Type Description** | To record requests for smoke detector installation |
| **Process Overview** | 1. Constituent requests the service 2. The Agent creates a case by selecting the *Smoke Detector* ***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 *Smoke Detector* ***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).    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, Open, In-Progress, Closed | New | | Case Origin | Phone, Email, Web, Facebook, Twitter, Mobile, Text, Communities | Phone | | Priority | High, Medium, Low | Medium | |
| **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** | | Smoke Detector | Refer to SLA Document | | None | | Service Not Needed | 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** | | Smoke Detector | Smoke Detector | < ? > | | Service Not Needed | None | 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: Get information on **Name**, **Address**, and **Phone** number of the Customer for follow-up. These are standard fields, so not captured under additional information section.  Case Field: Residence Type: Single Family House, Apartment  If Single family house then proceed with request. If customer answers "apartment" then trigger the following query: "how many apartments?": If the customer answers 2 or less then proceed with request. Iif customer answers "more than 2" then "no". Do not proceed with the request. (at this point it is the code requirement to the property owner to install a hardwired system among other requirements at this point). We do not service "multi-family units due to code requirements" is good terminology to explain to the customer.  **Additional Information section**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Field Label** | **Field Type** | **Required** | **Rule #** | **History** | **Field Help Text** | | New Request | Picklist  **Values:** Yes, No | Yes | Workflow Rule #1 | No | Is this request for a smoke detector a new request? | | Residence Type | Picklist  **Values:** Single Family House, Apartment  **Default:**  This read-only field will be automatically populated from the GIS Zoning layer associated with the GIS record selected as the Service Request Location. | Yes | None | No | Is the residence a single family house or an apartment? | | How Many Families | DEPENDENT ~~Number~~ Picklist  (Controlling field = *Residence Type*)  **Values:** 1 - 2 Families, 3 or More Families  **Default:**  All values are shown if *Residence Type* = ‘Apartment’ | Dependent | None | No | How many families are in the apartment? | | Do you have a working smoke detector | DEPENDANT Picklist  (Controlling field = *How Many Families*)  Picklist  **Values:** Yes, No  **Default:**  All values are shown if *How Many Families* > 2 3 or More Families | Dependent | Workflow Rule #2  Workflow Rule #3 |  | Are there any working smoke detectors in the residence? | | Philadelphia Residence (Move rule to top) | Picklist  **Values:** Yes, No  **Default:**  This read-only field will be automatically populated from the GIS Zoning layer associated with the GIS record selected as the Service Request Location. | Yes | Workflow Rule #4 | No | Is the customer a resident of Philadelphia? | | Apartment/Building/Unit Number | DEPENDENT Number  (Controlling field = *Residence Type*)  All values are shown if *Residence Type* = ‘Apartment’ | Yes | None | No | What is the unit number of the apartment or building? | | Owner Occupied Property | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | Does the customer live in an owner-occupied property? | | Access Provided by Adult | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | Will an adult (over 18) be present to provide access to the property? | | Disabilities/Language Information | Text(100) | Yes | None | No | Is the customer hearing-impaired or have other disabilities? | | Installation Time | Text (100) | Yes | None | No | What will be the best time of day for the Fire Department to come by and install the smoke alarm? | | Floor | Number | Yes | None | No | What floor is the installation location? | | Front or Back | Picklist  **Values:** Front, Back  **Default:** | Yes | None | No | Is the installation location entrance in the front or the back of the property? | | Engine | Text (25)  This read-only field will be automatically populated from the GIS Fire layer associated with the GIS record selected as the Service Request Location. | Yes | None | No | Auto-populated from GIS |   **Validation Rules**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** | **Comments** | |  |  |  |  |  |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *New Request* | Check the SLA and the status of the case. If within the SLA, notify the customer. If past the SLA, contact the Chief of Fire Prevention at (215) 686-1382 regarding complaints. | Evaluate the rule when a record is created, and every time it’s edited. | *New Request Type* = ‘No’ | **Display Message to Agent**: “Click on the Contact Name to retrieve the Contact Info, and open the previous case. Review the case’s SLA and the status of the case. If within the SLA, notify the customer. If past the SLA escalate to Supervisor.”  **Display Message to Supervisor**: ”Contact the Chief of Fire Prevention at (215) 686-1382 regarding complaints and close case.” | | 2 | Workflow Rule for *Do you have a working smoke detector = No* | The Fire Department does not service multi-family units (more than two families) due to code requirements. The property owner is responsible. | Evaluate the rule when a record is created, and every time it’s edited. | *Do you have a working smoke detector* = ‘Yes’ | Display Message: “The Fire Department does not service multi-family units due to code requirements. The property owner is responsible.”  Have agent confirm message and proceed to next field. | | 3 | Workflow Rule for *Do you have a working smoke detector = No* | If a rental property does not have a working smoke detector it is an L&I violation | Evaluate the rule when a record is created, and every time it’s edited. | *Do you have a working smoke detector* = ‘No’ | Display message: “The system has changed the *Case Record Type* to *L&I* Maintenance Residential.”    Automatically change the *Case Record Type* = ‘*L&I* Maintenance Residential’ and *Service Request Type* to “Service Not Needed’ and Close the Case. | | 3 | Workflow Rule for *Philadelphia Resident* | The Fire Department provides free smoke detectors only for Philadelphia residents. | Evaluate the rule when a record is created, and every time it’s edited. | *Philadelphia Resident* = ‘No’ | Display Message: “The Fire Department provides free smoke detectors only for Philadelphia residents.”  Automatically change *Service Request Type* to “Service Not Needed’ and save the case.  Automatically assign the case and then close it with a Close Reason = “Service Not Needed”. | |
| **Escalation Rule** | None |
| **Agent Instructions** | * Purpose: To request smoke detectors and alarms. * Complaints: Notify a supervisor who will follow up. Do not transfer or refer customers to the Fire Department. Supervisor Only: Contact the Chief of Fire Prevention at (215) 686-1382 regarding complaints. * Contact fields: Enter the customer’s name, address, and phone number (to follow up/schedule an appointment for delivery and installation).   + Advise the customer that this information is requested in the event the department needs to obtain more information to follow up on this request. * Service Address fields: Enter the customer’s name, address, zip code, and phone number.   + Verify that you entered the address correctly by repeating the address back to the customer. * Description field: Enter any additional information about the smoke detector request. * Advise the constituent:   + Special Needs: Ask the customer if any special needs situations are applicable, such as language assistance needed, hearing impairment, or limited mobility.   + To access the property, an adult (over 18) must be present. The Fire Department will use the customer’s contact information to schedule an inspection time if the customer requests an interior inspection. * 311 will submit a service request for the customer’s request for a 10 year lithium battery smoke detector. * Requests will be forwarded to the Fire Department who will contact the customer to arrange delivery and installation.  Note: requests received after 5:00 PM will be processed the next business day. * To process the service request the following information will be needed of the person who the smoke detector is for. * It may take up to 60 business days for the Fire Department to install a smoke detector. * The Fire Department will determine how many smoke detectors/alarms are needed once on site. **If the customer does NOT want the Fire Department to install a smoke alarm:** * Can they get the smoke alarm provided without installation (they want to install themselves)? No. * Will the Fire Department deliver the smoke alarm without installing (they want to install themselves)? No. * Can they pick up a smoke alarm from the Fire Department directly? No. |
| **Profiles** | Case Record Type will be made available to the “311 Agents”, “311 Supervisors”, “Case Workers”, and “System Administrators” Profiles.  **Note**: Profile definitions for the City have not been determined. Profiles above are for reference. |
| **Support Process Values** | New, Open, In-Progress, Closed |
| **ESRI/GIS Information** | The GIS layers to be displayed are:   * The fire districts   The GIS features to be displayed for a selected address are:   * The fire stations   + Data to be displayed on mouse-over = Fire station address * Open Salesforce cases for Case Record Type = Complaint Against Fire or EMS   + Data to be displayed on mouse-over = Case #, Date Created, Contact Name, Status   The GIS features used but not displayed are:   * Zoning (all) * Address Validation Service |
| **Other Information** |  |
| **Actions** | 1. **Clinton and Tom**: Research if the Single Family or Duplex field can be automatically populated using GIS, OPA…. Can we set the value of the field to ‘Yes’ automatically if the property is either Single Family or Duplex? 2. **Clinton and Tom**: Is there any way to determine a vacant lot using GIS 3. **Clinton and Tom**:: Which of these GIS layers and features could be used for this service request: Fire has the following layers as Polygons: Battalion, Ladder Locals, Stations, Engine Locals, Fire Safety Education Districts. The following are points: Fire Dept. Facilities, Box Points. Hydrants should come from PWD. Also, research the need for Census Tracts, Blocks, PSA, etc. |

# Approvals after Requirements Definition Workshop

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| **Date** | **Approver Name** | **Approver Signature** |
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