# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/29/2014 | Initial Draft Before Workshop | J. Kelly |
| 1.1 | 02/17/2014 | Design Revisions | J. Kelly |
| 1.2 | 02/24/2014 | Design Revisions | J. Kelly |
| 1.3 | 02/26/2014 | Revisions Based on Previous L&I Meetings | J. Kelly |
| 1.4 | 03/02/2014 | Revisions Based on Requirements Workshop | J. Kelly |
| 1.5 | 04/07/2014 | Removed all yellow highlighting from the changes from the requirements workshop. | J. Kelly |
| 1.6 | 05/29/2014 | Updated revised SLA | Sreelatha SK |
| 1.7 | 08/12/2014 | Updated based on follow-up session | M. Schmidt |

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# 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** | License & Inspection |
| **Record Type Name** | Boarding Room House |
| **Record Type Description** | Property renting rooms without proper zoning permit |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Boarding Room House* ***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 *Boarding Room House* ***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, Open, In-Progress, Closed | New | | Case Origin | Phone, Email, Web, Facebook, Twitter, Mobile, Text, Communities |  | | 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** | | Boarding Room House | Refer to SLA Document | | Hansen | | 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** | | Boarding Room House | L&I Operations North District | < ? > | | Boarding Room House | L&I Operations South District | < ? > | | Boarding Room House | L&I Operations East District | < ? > | | Boarding Room House | L&I Operations West District | < ? > | | Boarding Room House | L&I Operations Central District | < ? > | | Service Not Needed | 311 Contact Center | 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:   **Additional Information section**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Field Label** | **Field Type** | **Required** | **Rule #** | **History** | **Field Help Text** | | Number of Tenants | Number | Yes | None | Yes | How many tenants reside in the property? | | Rental License | 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. |  | Workflow Rule #1 |  | Does the property have a rental license? | | Zoning Permit | 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. |  | Workflow Rule #2 |  | Does the property have the proper zoning permit? | | Does Owner Reside at Property | Picklist  **Values:** Yes, No  **Default:** | Yes | None | Yes | Does the owner of the property reside there? | | Property Owner Name | Text(255)  This read-only field will be automatically populated from the Address Validation Service based on the Service Request Location. | Yes | None | Yes | The name of the property’s owner. | | Property Owner Phone Number | Phone Number | No | None | Yes | Information for contacting the property’s owner (if known). | | L&I District | Text(50)  This read-only field will be automatically populated from the GIS L&I District layer associated with the GIS record selected as the Service Request Location | Yes | None | No | The L&I district in which the property is located. | | L&I Address | Text(100)  This read-only field will be automatically populated from the GIS L&I District layer associated with the GIS record selected as the Service Request Location. | Yes | Workflow Rule #3 | No | The L&I address key, based on the entered service address. |   **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 *Rental License* | If there is no rental license, submit a License Residential service request. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Rental License* = ‘No’ | Display message: “The system has changed the *Case Record Type* to License Residential.”    Automatically change the *Case Record Type* = ‘License Residential’. | | 2 | Workflow Rule for *Zoning Permit* | If there is both a rental license and a valid zoning permit, there is no violation. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Rental License* = ‘Yes’ AND *Zoning Permit* = ‘Yes’ | Display Message: “If there is both a rental license and a valid zoning permit, there is no violation.”  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”. | | 3 | Workflow Rule for *L&I* *Address (NULL)* | The system will change the case to a Service Not Needed if the Address Key returned from GIS is NULL. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Address Key* returned from GIS is NULL | Display Message: “A zoning violation case can be submitted only if the exact L&I address key is validated.”  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** | TBD |
| **Agent Instructions** | * Purpose: To report an illegal boarding or rooming house.   + Boarding house: The rental of rooms where meals are provided.   + Rooming house: Rented residential premises where an individual shares a kitchen and bathroom with others. * Contact fields: Enter the name and contact information of the person making the report.   + 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 the 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?” * Service Address fields: Enter the exact, valid address of the reported boarding/rooming house.   + Verify that you entered the address correctly by repeating the address back to the customer. If the address does not verify in Hansen, advise the the customer that “The system is unable to locate the property address. I am sorry this request cannot be processed if the system cannot find it.” * Description field: Enter a description of the boarding/rooming house. * Advise the customer:   + For an interior residential inspection, an adult (over 18) must be present. The L&I inspector will use the customer’s contact information to schedule an inspection time if the customer requests an interior inspection.   + Once a case is entered into the system the property should be inspected by L&I within 30 business days. |
| **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 for the service request Location are:   * L&I Operations Districts (all five districts: South, North, East, West, and Central)   The GIS features to be displayed for a selected address are:   * Open housing inspection licenses   + Data to be displayed on mouse-over = License #, Date Created, Applicant * Open zoning/use permits   + Data to be displayed on mouse-over = License #, Date Created, Applicant * Open L&I violations   + Data to be displayed on mouse-over = Violation #, Date Created, Applicant * Open Salesforce cases for Case Record Type = Boarding Room House * Data to be displayed on mouse-over = Case #, Date Created, Contact Name, Status   The GIS layers used but not displayed are:   * Zoning (all) * Address Validation Service |
| **Other Information** |  |
| **Actions** |  |

# Approvals after Requirements Definition Workshop

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