# 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 | 02/27/2014 | Revisions Based on Requirements Workshop | J. Kelly |
| 1.5 | 04/07/2014 | Added Kimberly Adams’ resolution to Action Item #1. | J. Kelly |
| 1.6 | 07/07/2014 | Updated the *Type of Work Being Done* field type, validation rule for Zoning Service Request Type. | 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).

**NOTE: The Electrical Construction, Plumbing Construction, and Zoning Construction requirements documents have been integrated into this document.**

# Requirements

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| **Department** | License & Inspection |
| **Record Type Name** | Building Construction |
| **Record Type Description** | Building construction without permit or other building construction violation |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Building Construction* ***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 *Building Construction* ***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** | | Building Construction | Refer to SLA Document | | Hansen | | Electrical Construction | Refer to SLA Document | | Hansen | | Plumbing Construction | Refer to SLA Document | | Hansen | | Zoning Construction | 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** | | Building Construction | North L&I Construction District | < ? > | | Building Construction | South L&I Construction District | < ? > | | Building Construction | East L&I Construction District | < ? > | | Building Construction | West L&I Construction District | < ? > | | Building Construction | Central L&I Construction 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:   * Building Construction cases are assigned to a queue based on the *L&I District* field. |
| **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** | | | Type of Work Being Done | Picklist  **Values:** Building, Electrical, Plumbing, Zoning  **Default:** | Yes | | Workflow Rule #1, Workflow Rule #2, Workflow Rule #3, Workflow Rule #4 | | No | | What type of construction work is being done (building, electrical, plumbing, zoning, or a combination of these)? | | | Valid Permit | Picklist  **Values:** Yes, No, Unsure  **Default:** | Yes | | Workflow Rule #5 | | No | | Is there a valid permit for the work being done? Select “Unsure” if the permit may be exceeded or may be invalid. | | | Unsafe Conditions | Picklist  **Values:** Yes, No  **Default:** | Yes | | Workflow Rule #6 | | No | | Are there unsafe conditions at the site? | | | Where is Work Being Done | Text(255) | Yes | | None | | No | | Where is the work being done on the property (front, rear, right side, left side, interior, exterior, specific floors, basement, front yard, back yard, etc.). | | | Day of Week Work Being Done | Text(100) | Yes | | None | | No | | On what day(s) of the week is the work being done? | | | Time of Day Work Being Done | Text(100) | Yes | | None | | No | | At what time(s) of day is the work being done? | | | Contractor/Company Name | Text(255) | No | | None | | No | | The name of the contractor or company doing the construction work (if it is known). | | | Sparking Wires or Illegal Hookups | DEPENDENT Picklist  (Controlling field = *Type of Work Being Done*)  Values = Yes, No  All values are shown if *Type of Work Being Done* = ‘Electrical’ | | No | | Validation Rule #1, Workflow Rule #7 | | No | | Are there issues with sparking wires or illegal electrical hookups while electrical construction is NOT in progress? | | Fence, Paved Area, or Shed | DEPENDENT Picklist  (Controlling field = *Type of Work Being Done*)  Values = Fence, Paved Area, Storage Shed  All values are shown if *Type of Work Being Done* = ‘Zoning’ | | No | | Validation Rule #2 | | No | | Is the customer reporting a fence that is too high, an area paved to be a parking space, or a storage shed that is too big? | | Fence Location | DEPENDENT Picklist  (Controlling field = *Fence, Paved Area, or Shed*)  Values = Front, Back  All values are shown if *Fence, Paved Area, or Shed* = ‘Fence’ | | No | | Validation Rule #3, Workflow Rule #8, Workflow Rule #9 | | No | | Where is the fence located (front or back of property)? | | Fence Height (Feet) | DEPENDENT Picklist  (Controlling field = *Fence, Paved Area, or Shed*)  Values = Under 4, 4, 5, 6, Above 6, Unknown  All values are shown if *Fence, Paved Area, or Shed* = ‘Fence’ | | No | | Validation Rule #4, Workflow Rule #8, Workflow Rule #9 | | No | | What is the height of the fence (in feet)? | | Storage Shed Location | DEPENDENT Picklist  (Controlling field = *Fence, Paved Area, or Shed*)  Values = Front, Back  All values are shown if *Fence, Paved Area, or Shed* = ‘Storage Shed’ | | No | | None | | No | | Where is the storage shed located (front or back of property)? | | L&I District | Text(50)  This read-onlfy 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 #10 | | No | | The L&I address key, based on the entered service address. |   **Validation Rules**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** | **Comments** | | 1 | Validation Rule for *Sparking Wires or Illegal Hookups* | The *Sparking Wires or Illegal Hookups* field must be populated (not NULL) if *Type of Work Being Done* = ‘Electrical’ |  |  | | 2 | Validation Rule for *Fence, Paved Area, or Shed* | The *Fence, Paved Area, or Shed* field must be populated (not NULL) if *Type of Work Being Done* = ‘Zoning’ |  |  | | 3 | Validation Rule for *Fence Location* | The *Fence Location* field must be populated (not NULL) if *Type of Work Being Done* = ‘Zoning’ AND Fence, Paved Area, or Shed = ‘Fence’ |  |  | | 4 | Validation Rule for *Fence Height (Feet)* | The *Fence Height (Feet)*field must be populated (not NULL) if *Type of Work Being Done* = ‘Zoning’ AND Fence, Paved Area, or Shed = ‘Fence’ |  |  |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *Type of Work Being Done (Building)* | If the report is about an electrical violation, the S*ervice Request Type* is Electrical Construction. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Type of Work Being Done* = ‘Building’ | Automatically change the *Service Request Type* = ‘Building Construction’. | | 2 | Workflow Rule for *Type of Work Being Done (Electrical)* | If the report is about an electrical violation, the S*ervice Request Type* is Electrical Construction. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Type of Work Being Done* = ‘Electrical’ | Automatically change the *Service Request Type* = ‘Electrical Construction’. | | 3 | Workflow Rule for *Type of Work Being Done (Plumbing)* | If the report is about an electrical violation, the S*ervice Request Type* is Plumbing Construction. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Type of Work Being Done* = ‘Plumbing’ | Automatically change the *Service Request Type* = ‘Plumbing Construction’. | | 4 | Workflow Rule for *Type of Work Being Done (Zoning)* | If the report is about an electrical violation, the S*ervice Request Type* is Zoning Construction. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Type of Work Being Done* = ‘Zoning’ | Automatically change the *Service Request Type* = ‘Zoning Construction‘. | | 5 | Workflow Rule for *Valid Permit* | If the permit is valid, then the Service Request Type is Construction Site Task Force. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Valid Permit* = ‘Yes’ | Display message: “The system has changed the *Service Request Type* to Construction Site Task Force.”    Automatically change the *Service Request Type* = ‘Construction Site Task Force’. | | 6 | Workflow Rule for *Unsafe Conditions* | If there are unsafe conditions, the *Case Record Type* is Construction Site Task Force. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Unsafe Conditions* = ‘Yes’ | Display message: “The system has changed the *Service Request Type* to Construction Site Task Force.”    Automatically change the *Service Request Type* = ‘Construction Site Task Force’. | | 7 | Workflow Rule for *Sparking Wires or Illegal Electrical Hookups* | If the caller is reporting issues with sparking wires or illegal electrical hookups and NOT electrical construction in progress, submit a Fire Residential case. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Sparking Wires or Illegal Electrical Hookups = ‘Yes’* | Display message: “The system has changed the *Service Request* Type to Fire Residential.”    Automatically change the *Service Request Type* = ‘Fire Residential’. | | 8 | Workflow Rule for *Fence Height* | If a fence is 4 feet high or lower and in the front of the property, no case will be submitted. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Fence Height* = ‘Under 4’ OR ‘4’ AND *Fence Location* = ‘Front’ | Display Message = “If a fence is 4 feet high or lower and in the front of the property or along a street, no case will be submitted.”  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”. | | 9 | Workflow Rule for *Fence Height* | If a fence is under 6 feet high or lower and in the rear of the property, no case will be submitted. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Fence Height* = ‘Under 4’ OR ‘4’ OR ‘5’ OR ‘6’ AND *Fence Location* = ‘Rear’ | Display Message = “If a fence 6 feet high or lower and in the rear of the property, no case will be submitted.”  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”. | | 10 | 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 Building Construction 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 one of the following:   + Someone doing building construction work without a permit.   + Someone doing electrical construction work without a permit or possible unsafe electrical work.   + Someone doing plumbing construction work without a license or without the proper permits, such as installing new plumbing.   + A fence over 6 feet in the rear of a property or over 4 feet in the front of a property without a permit.   + A storage container or shed without the required permits.   + A paved area that is used as a parking space. * Contact fields: Enter the name and phone number of the customer reporting the problem.   + 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 property address.   + 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 detailed description of the construction work being done. * Advise the customer:   + - * L&I will inspect for complaints at a construction site including: possible unsafe work, no permits on file, work performed outside of the scope of the issued permit, mess affecting neighboring properties, refusal to post permits (after being asked).   + An inspection should occur within 10 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 Construction Districts (all five districts: South, North, East, West, and Central)   The GIS features to be displayed for a selected address are:   * Open construction permits   + Data to be displayed on mouse-over = Permit #, Date Created, Applicant * Open construction licenses   + Data to be displayed on mouse-over = License #, Date Created, Applicant * Open construction violations   + Data to be displayed on mouse-over = Violation #, Date Created, Applicant * Open zoning permits   + Data to be displayed on mouse-over = Permit #, Date Created, Applicant * Open zoning appeals   + Data to be displayed on mouse-over = Appeal #, Date Created, Applicant * Open zoning/use permits   + Data to be displayed on mouse-over = Permit #, Date Created, Applicant * Open Salesforce cases for Case Record Type = Daycare Residential or Commercial * 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. Kimberly: Give John article about storage sheds and paved areas. *Per Kimberly on 03/28/14: Done.* |

# Approvals after Requirements Definition Workshop

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