# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/29/2014 | Initial Draft Before Workshop | J. Kelly |
| 1.1 | 02/12/2014 | Design Edits | J. Kelly |
| 1.2 | 02/17/2014 | Design Revisions | J. Kelly |
| 1.3 | 02/24/2014 | Design Revisions | J. Kelly |
| 1.4 | 02/26/2014 | Revisions Based on Previous L&I Workshops | J. Kelly |
| 1.5 | 02/28/2014 | Revisions Based on Requirements Workshop | J. Kelly |
| 1.6 | 03/31/2104 | Added Emergency Façade Repair workflow based on review comment from the City. Removed yellow highlighting and strikethroughs. Added responses to Action Items #1 through 3. | J. Kelly |
| 1.7 | 04/25/2014 | Added Sheryl Johnson’s response to Action Item # 2. | J. Kelly |
| 1.8 | 07/4/2014 | Added validation for House or Apartment Complex, Single or Multi-Family and modified Validation Rule-2 & 3 | Sreelatha SK |
| 1.9 | 08/12/2014 | Updated based on follow-up session | M. Schmidt |
| 1.10 | 09/08/2014 | Added additional Service Request Types and Assignment queues | Sreelatha SK |
| 1.11 | 12/03/2014 | Added greyed out fields | M. Schmidt |

# 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 Building Dangerous Historical, Building Dangerous Occupied and Building Dangerous Vacant documents have all been integrated into this one requirements document.**

# Requirements

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| **Department** | License & Inspections |
| **Record Type Name** | Building Dangerous |
| **Record Type Description** | Building in danger of collapse, has collapsed, and/or has building material falling from the building. |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Building Dangerous Historical* ***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 Dangerous Historical* ***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 Dangerous Historical~~ | ~~Refer to SLA Document~~ | | ~~Hansen~~ | | Building Dangerous Occupied | Refer to SLA Document | | Hansen | | Building Dangerous Vacant | Refer to SLA Document | | Hansen | | Emergency Façade Repair | Refer to SLA Document | | Hansen | | Emergency Transfer | None | | None | | Service Not Needed | 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 Dangerous~~ | ~~L&I Contractual Services~~ | ~~< ? >~~ | | Building Dangerous Occupied | L&I Contractual Services | < ? > | | Building Dangerous Vacant | L&I Contractual Services | < ? > | | Emergency Façade Repair | L&I Contractual Services | < ? > | | Emergency Transfer | 311 Contact Center | None | | 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** | | Building Collapsing | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #1 | No | If the building collapsing, call 911. | | Under Construction or Demolition | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #2 | No | Is the building currently under construction or demolition? | | Emergency Repairs for Façade | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Does the building’s façade require emergency repairs? | | Location of Dangerous Condition | Multi-Picklist  **Values:** Exterior, Interior, Front, Back, Left Side, Right Side  **Default:** | Yes | None | No | Where is the dangerous or unsafe condition? | | ~~Historical Building~~ | ~~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~~ | ~~Does the building have a “Historical” designation? (For example, Betsy Ross House, or The Union League.)~~ | | Vacant or Occupied | Picklist  **Values:** Vacant, Occupied  **Default:** | No | Validation Rule #1, Workflow Rule #5, Workflow Rule #6 | No | Is the building vacant or occupied? | | Residential or Commercial | Picklist  **Values:** Residential, Commercial  **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 building residential or commercial? | | House or Apartment Complex | DEPENDENT Picklist  (Controlling field = *Residential or Commercial*)  Values = House, Apartment Complex  All values are shown if *Residential or Commercial* = ‘Residential’ or ‘Commercial’  This read-only field will be automatically populated from the GIS Zoning layer associated with the GIS record selected as the Service Request Location. | No | Validation Rule #2 | No | Is the building a house or an apartment complex? | | Single or Multi-Family | DEPENDENT Picklist  (Controlling field = *Residential or Commercial*)  Values = Single Family, Multi-Family  All values are shown if *Residential or Commercial* = ‘Residential’ or ‘Commercial’  This read-only field will be automatically populated from the GIS Zoning layer associated with the GIS record selected as the Service Request Location. | No | Validation Rule #3 | No | Is the property single-family or multi-family? | | 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 #7 | 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 *Vacant or Occupied* | The *Vacant or Occupied* field must be populated (not NULL) if *Historical Building* = ‘No’ |  |  | | 2 | Validation Rule for *House or Apartment Complex* | The *House or Apartment Complex* field must be populated (not NULL) if *Residential or* *Commercial* = ‘Residential’ or ‘Commercial’ |  | Grey out if not required | | 3 | Validation Rule for *Single or Multi-Family* | The *Single or Multi-Family* field must be populated (not NULL) if *Residential or* *Commercial* = ‘Residential’ or ‘Commercial’ |  | Grey out if not required |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *Building Collapsing* | If the building being demolished is collapsing, transfer the caller to 911. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Building Collapsing* = ‘Yes’ | Display Message: “Hot transfer the customer to 911.”  Automatically change the *Case Record Type* to “Emergency Transfer” and close case. | | 2 | Workflow Rule for *Under Construction or Demolition* | If the building is currently under construction or demolition, submit a Construction Site Task Force service request. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Under Construction or Demolition* = ‘Yes’ | Display Message: “If the building is currently under construction or demolition, submit a Construction Site Task Force service request.”  Automatically change the *Case Record Type* to “Construction Site Task Force”. | | 3 | Workflow Rule for *Emergency Repairs for Façade* | If the problem is with a building’s façade, submit a Building Dangerous case record but an Emergency Façade Repair service request. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Emergency Repairs for Façade = ‘Yes’* | Automatically change the *Service Request Type* to “Emergency Façade Repairs”. | | ~~4~~ | ~~Workflow Rule for~~ *~~Historical Building~~* | ~~If a dangerous building is vacant, then submit a Building Dangerous Historical service request.~~ | ~~Evaluate the rule when the value in a field(s) is populated/updated to a specific value.~~ | *~~Historical Building~~* ~~= ‘Yes’~~ | ~~Automatically change the~~ *~~Service Request Type~~* ~~to “Building Dangerous Historical”.~~ | | 5 | Workflow Rule for *Vacant or Occupied* | If a dangerous building is vacant, then submit a Building Dangerous Vacant service request. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Vacant or Occupied* = ‘Vacant’ | Automatically change the *Service Request Type* to “Building Dangerous Vacant”. | | 6 | Workflow Rule for *Vacant or Occupied* | If a dangrous building is occupied, then submit a Building Dangerous Occupied service request. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Vacant or Occupied* = ‘Occupied’ | Automatically change the *Service Request Type* to “Building Dangerous Occupied”. | | 7 | 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 unsafe or dangerous building or home.   + Historical building: A property with an official Historical designation. For example, the Betsy Ross House or the Union League.   + Occupied Building: A structure that has people living inside.   + Vacant Building: The structure that has no legal residents.   + Dangerous: The property has structural issues and is in danger of collapse, has collapsed, and/or has building material falling from the building. Examples: A report of a property with a wall collapsed in the rear, or a property whose foundation is sinking or cracked. * 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 system is unable to locate the property address, advise the customer: “We cannot verify that address. Please call 911 immediately.” * Description field: Describe the dangerous and/or unsafe condition(s). * 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.   + An inspection will occur within 15 business days.   + If the property fails the inspection, violations are issued. |
| **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 features to be displayed for a selected address are:   * The permits, licenses, violations, and appeals currently listed for each location in the Philly map   + Data to be displayed on mouse-over = Attributes currently listed each each feature * All L&I violations   + Data to be displayed on mouse-over = Violation #, Date Created, Status * 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** |  |

# Approvals after Requirements Definition Workshop

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