# 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 | Revisions Based on Initial L&I Workshops | J. Kelly |
| 1.3 | 02/25/2014 | Revisions Based on Workshop Meeting | J. Kelly |
| 1.4 | 03/02/2014 | Revisions Based on Requirements Workshop | J. Kelly |
| 1.5 | 04/07/2014 | Added Sheryl Johnson’s response to Action Item #1. Removed yellow highlighting from revisions from requirements workshop. | J. Kelly |
| 1.6 | 04/16/2014 | Added Kimberly Adams’ clarification of Action Item #2. | J. Kelly |
| 1.7 | 05/29/2014 | Updated revised SLA | Sreelatha SK |
| 1.8 | 08/08/2014 | Updated based on follow-up session | 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 Fire Residential and Fire Commercial requirements documents have been integrated into this one requirements document.**

# Requirements

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| **Department** | License & Inspections |
| **Record Type Name** | Fire Residential or Commercial |
| **Record Type Description** | To report a rental property, residential building, or commercial building with fire code violations. |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Fire Residential or Commercial* ***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 *Fire Residential or Commercial* ***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** | | Fire Commercial | Refer to SLA Document | | Hansen | | Fire Residential | 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** | | Fire Residential or Commercial | L&I Operations North District | Hansen | | Fire Residential or Commercial | L&I Operations South District | Hansen | | Fire Residential or Commercial | L&I Operations East District | Hansen | | Fire Residential or Commercial | L&I Operations West District | Hansen | | Fire Residential or Commercial | L&I Operations Central District | Hansen | | 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:   * Fire Residential or Commercial 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** | | Hazardous Materials Spill | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #1 | No | Is there a hazardous materials spill? | | 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 | Workflow Rule #2, Workflow Rule #3 | No | Is fire code violation in a residential building or a commercial building? | | Residential Property Type | Dependent Picklist  (Controlling field = *Residential or Commercial*)  **Values:** House, Apartment, Condo  **Default:**  All values are shown if *Residential or Commercial* = ‘Residential’ | No | Validation Rule #1 | No | Is the property a house or apartment? | | Unit Number | Dependent Text(25)  *Unit Number* is enabled and required if *Residential or Commercial* = ‘Residential’, AND *Residential Property Type* = ‘Apartment’ OR ‘Condo’. | No | Validation Rule #2 | No | The number of the unit. | | Specific Location of Fire Code Violation | Text(255) | Yes | None | No | What is the specific location of the fire code violation? | | 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 #4 | 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 *Residential Property Type* | The *Residential Property Type* field must be populated (not NULL) if *Residential or Commercial* = ‘Residential’. |  |  | | 2 | Validation Rule for *Unit Number* | The *Unit Number* field must be populated (not NULL) if *Residential or Commercial* = ‘Residential’, AND *Residential Property Type* = ‘Apartment’ OR ‘Condo’. |  |  |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *Hazardous Materials Spill* | If there is a hazardous materials spill, transfer the caller to 911. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Hazardous Materials Spill* = ‘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 *Residential or Commercial (Residential)* | If the property is residential, then submit the Fire Residential service request. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Residential or Commercial* = ‘Residential’ | Set the *Service Request Type* to ‘Fire Residential’. | | 3 | Workflow Rule for *Residential or Commercial (Commercial)* | If the property is commercial, then submit the Fire Commercial service request. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Residential or Commercial* = ‘Commercial’ | Set the *Service Request Type* to ‘Fire Commercial. | | 4 | Workflow Rule for *L&I* *Address (NULL)* | The system will change the case to a Service Not Needed service request 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 fire code 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 a rental property, residential building, or commercial building with fire code violations. * Residential examples: A rental property or residential building without smoke detectors, carbon monoxide (CO) detectors, fire extinguishers, and/or fire suppression systems. Additionally, these violations include tenants reporting maintenance issues such as sparking or smoking outlets/electrical wiring which could cause a fire. * Commercial examples: No fire protection system, smoke detectors or sprinklers, blocked stairways or exits. * Contact fields: Enter the the customer’s name, address, and phone number.   + 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 legal address of the property.   + 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: Describe the fire code violations and the locations of the violations. * Advise the customer:   + Once entered into the system the property, L&I should inspect the property within 30 business days.   + The customer can get more information at <http://www.phila.gov/li/Pages/default.aspx>. |
| **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:   * L&I Violations – Open Fire Code Violations   + Data to be displayed on mouse-over = the same data currently shown in the map for L&I fire code violations. * Open Salesforce cases for Case Record Type = Fire Residential or Commercial   + Data to be displayed on mouse-over = Case #, Date Created, Contact Name, Status   The GIS layers used but not displayed are:   * Zoning (all) |
| **Other Information** | * TBD: The current policy is that if the L&I address key is not validated (NULL) then this is an information request that the 311 call center cannot accept. The City may review this policy. * Note: Applicable for other building service requests: 5 L&I Construction Districts for BD. |
| **Actions** | 1. Bernice: Verify that the SLA change from 30 days to 20 days is official. *Per Sheryl Johnson on 04/04/14: The SLA should stay at 30 days unless Philly311 receives a formal change.* 2. Steve and Clinton: Determine in the integration meetings how apartment units will be handled. *Per Kimberly Adams on 04/16/2014: Hansen does not recognize apartment numbers. We often have customers reporting the same type of inquiry at the same address but with a different apartment number. Because Hansen cannot recognize apartments, these are transferred to Hansen as duplicates and attach to the first customer who called. The other calls do not generate an inspection. Our current work around for this is to have supervisors manually enter the additional calls with the same type of inquiry into Hansen directly so they will generate separate service request numbers and therefore separate inspections. I am unsure if the apartment number issue with Hansen will be resolved by implementation so it’s possible that a similar work around will need to be created going forward. 04/16/2014: John Kelly forwarded Kimberly’s clarification to Tom Gagne.* 3. Steve and Clinton: Need to address question of duplicates in meetings with Streets and L&I. |

# Approvals after Requirements Definition Workshop

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