# 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 from Previous L&I Meetings | J. Kelly |
| 1.4 | 03/02/2014 | Revisions from Requirements Workshop | J. Kelly |
| 1.5 | 03/31/2014 | Updated Action Items section with the City response. | J. Kelly |
| 1.6 | 05/29/2014 | Updated revised SLA | Sreelatha SK |
| 1.7 | 06/19/2014 | Updated Validation Rule #1 | M. Schmidt |
| 1.8 | 08/12/2014 | 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).

# Requirements

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| **Department** | License & Inspections |
| **Record Type Name** | License Residential |
| **Record Type Description** | Landlord renting property without the proper license |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *License Residential* ***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 *License Residential* ***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** | | License 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** | | License Residential | L&I Operations North District | Hansen | | License Residential | L&I Operations South District | Hansen | | License Residential | L&I Operations East District | Hansen | | License Residential | L&I Operations West District | Hansen | | License Residential | 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:   * License Residential 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** | | ~~How Many Renters~~ | ~~Number~~ | ~~Yes~~ | ~~Workflow Rule #1~~ | ~~No~~ | ~~How many people are renting rooms at this property?~~ | | License to Rent | 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 | None | No | Does the owner have a license to rent? | | 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. | Yes | Workflow Rule #2, Workflow Rule #3 | No | Does the owner have the proper zoning permit? | | Property Type | Picklist  **Values:** Rented House, Rented Apartment  **Default:** | Yes | None | No | Is the entire house rented or just an apartment? | | Apartment Number | Dependent Text(25)  Apartment Number is enabled and required if *Property Type* = ‘Rented Apartment’. | No | Validation Rule #1 | No | The number of the apartment. | | 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 | No | The name of the owner of the property. | | Property Owner Contact Information | Text(50)  This read-only field will be automatically populated from the Address Validation Service based on the Service Request Location. | Yes | None | No | Information for contacting the property’s owner. | | 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 *Apartment Number* | *Property Type* = ‘Rented Apartment’. | “Apartment Number must be provided” |  |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | ~~1~~ | ~~Workflow Rule Resident Renting Only a Room~~ | ~~If the request about a rented room rather than a rented house or apartment, a Boarding Room House request should be submitted.~~ | ~~Evaluate the rule when the value in a field(s) is populated/updated to a specific value.~~ | ~~How Many Renters > 3~~ | ~~Display message: “The system has changed the Case Record Type to Boarding Room House.”~~    ~~Automatically change the Case Record Type = ‘Boarding Room House’.~~ | | 2 | Workflow Rule for *Zoning Permit* | Valid zoning permit and valid housing inspection license to rent, then no service request required. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *License to Rent* = ‘Yes’ AND *Zoning Permit* = ‘Yes’ | Display Message: “There is a valid zoning permit and valid housing inspection license to rent, so no service request is required.”  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”. | | 4 | 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 a property owner renting a house or apartment without a license. * Contact fields: Enter the name and contact information of the resident.   + 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 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: Enter any additional information about the case. * 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. * A property owner must have a valid housing license on file to legally rent a property. * Once a case is entered into the system the property should be inspected within 30 business days and if appropriate a violation(s) issued by L&I. * The owner usually has up to 30 days to comply with violations. |
| **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:   * Zoning (all) * L&I District (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 Commercial Activity Licenses   + Data to be displayed on mouse-over =License #, Date Created, Applicant * Open L&I license violations   + Data to be displayed on mouse-over =Violation #, Date Created, Applicant * Open Salesforce cases for Case Record Type = License Residential   Data to be displayed on mouse-over = Case #, Date Created, Contact Name, Status |
| **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. |
| **Actions** | 1. Adam: Should “Rented Condo” be an option for the Property Type field? *From Adam Johnson on 03/28: No. The same license is required, per the zoning.* |

# Approvals after Requirements Definition Workshop

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