# 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 | 02/02/2014 | Revisions Based on Requirements Workshop | J. Kelly |
| 1.5 | 04/07/2014 | Removed yellow highlighting from changes from requirements workshop | J. Kelly |

# 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** | No Heat (Residential) |
| **Record Type Description** | To report a complaint about lack of heat or no heat for inspection. |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *No Heat (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 *No Heat (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, In-Progress, Escalated, On Hold, and Closed | New | | Case Origin | Phone, Email, Web | Phone | | 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** | | No Heat Residential | 3 | Business Days | 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** | | No Heat Residential | L&I Operations North District | Hansen | | No Heat Residential | L&I Operations South District | Hansen | | No Heat Residential | L&I Operations East District | Hansen | | No Heat Residential | L&I Operations West District | Hansen | | No Heat 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: 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** | | 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 #1 | No | Is this property residential or commercial? | | Residential Property Type | Picklist  **Values:** Home, Apartment, Condo  **Default:** | Yes | None | No | Is the property a home, apartment, or condo? | | 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 #1 | No | The unit number of the apartment or condo. | | Heat Type | Picklist  **Values:** Gas/Oil, Electric, Wood Stove, Other  **Default:** | Yes | None | Yes | Does the property have gas/oil, electric, wood stove, or other type of heat? | | Number of Days Without Heat | Number | Yes | None | No | How many days has the tenant or owner been without heat? | | 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. | | Owner Address | TextArea  This read-only field will be automatically populated from the Address Validation Service based on the Service Request Location. | Yes | None | No | The address of the owner of the property. | | Owner Phone Number | Phone  This read-only field will be automatically populated from the Address Validation Service based on the Service Request Location. | Yes | None | No | The phone number of the owner of the property. | | 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 #2 | 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 *Unit Number* | The *Unit Number* field must be populated (not NULL) if *Residential Property Type* = ‘Apartment’ OR ‘Condo’. |  |  |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *Residential or Commercial* | “No heat” complaints are submitted for tenants and owner occupied residential dwellings only--not for commercial properties. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Residential or Commercial* = ‘Yes’ | Display Message: “’No heat’ complaints are submitted for tenants and owner occupied residential dwellings only--not for commercial properties.”  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”. | | 2 | 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 no heat complaint 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 complaint about no heat for inspection. “No Heat” complaints apply to tenants and owner occupied residential dwellings only. Complaints are **NOT** taken for commercial properties. * Contact fields: Enter name and phone number of the resident reporting no heat.   + 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 or the property with no heat.   + 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 complaint. * Advise the customer: * Inspection will occur within 3 business days.   + If violations are written for no heat, the owner has up to 7 business days to comply with the violation. |
| **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, Follow-up, 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 L&I violations * Data to be displayed on mouse-over = Violation #, Date Created, Contact Name, Status * Open Salesforce cases for Case Record Type = No Heat Residential * 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** | 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** | None |

# Approvals after Requirements Definition Workshop

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