# 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 Workshops | J. Kelly |
| 1.5 | 03/31/2014 | Updated with the City’s responses to action items #1, 2, 3, and 6. | J. Kelly |
| 1.6 | 05/29/2014 | Updated revised SLA, Field name modification due to size issue | Sreelatha SK |
| 1.7 | 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).

**NOTE: The Vacant House and Vacant Commercial requirements definition documents has been integrated into this one requirements document.**

# Requirements

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| **Department** | License & Inspections |
| **Record Type Name** | Vacant House or Commercial |
| **Record Type Description** | To report a vacant house or a vacant commercial building. |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Vacant House 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 *Vacant House 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** | | Vacant House | Refer to SLA Document | | Hansen | | Vacant Commercial | 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** | | Vacant House or Commercial | L&I Operations North District | Hansen | | Vacant House or Commercial | L&I Operations South District | Hansen | | Vacant House or Commercial | L&I Operations East District | Hansen | | Vacant House or Commercial | L&I Operations West District | Hansen | | Vacant House 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: 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 Commecial | 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, Workflow Rule #2 | No | Is the property residential or commercial? | | Are there any unsafe conditions? | Picklist  **Values:** Yes, No  **Default** | Yes | Workflow Rule #3 |  |  | | Valid License | 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 property have a valid vacant property license? | | Open to Trespass | Picklist  **Values:** Front, Rear, Both  **Default:** | Yes | None | No | Is the property open to trespass in the front, rear, or both on the first or grade floor. | | Inspection Access to Rear of Property | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | Is there access to the rear of the property for inspection? | | How to Access Rear of Property | DEPENDENT Text(255)  (Controlling field = *Access to Rear of Property for Inspection*)  Field is enabled if *Access to Rear of Property for Inspection* = ‘Yes’ | Yes | None | No | How can the inspectors access the rear 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 #4 | No | The L&I address key, based on the entered service address. |   **Validation Rules**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** | **Comments** | |  |  |  |  |  |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *Residential or Commercial (Residential)* | If the property is resdidential, the service request is Vacant House. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Residential or Commercial* = ‘Residential’ | Automatically set the *Service Request Type* = ‘Vacant House’. | | 2 | Workflow Rule for *Residential or Commercial (Commercial)* | If the property is resdidential, the service request is Vacant Commercial. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Residential or Commercial* = ‘Commercial’ | Automatically set the *Service Request Type* = ‘Vacant Commercial’. | | 3 | Workflow Rule for *Unsafe Violations* | If there are unsafe violations at the vacant property, submit a Building Dangerous service request. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Are there any unsafe conditions?* = ‘Yes’ | Display message: “The system has changed the *Case Record Type* to Building Dangerous.”    Automatically change the *Case Record Type* = ‘Building Dangerous’. | | 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 vacant property 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 vacant house or a vacant commercial building .   + A residential property is considered vacant if there are no legal residents living there.   + A commercial property is considered vacant if there are no legal lessees or owners using it. * Contact fields: Enter the name, address, 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 exact, legal address of the vacant property being reported.   + 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 description of any exterior maintenance issues and any additional information. * Advise the customer:   + If squatters are in the property they must be reported to Police for criminal trespassing. The property cannot be cleaned and sealed while squatters are present. L&I does not clean and seal commercial properties.   + If there is no access to rear of the property for inspection, inspectors will attempt to get in by contacting neighbors or by access trough the alleyway. If there is no safe entry, L & I will not be able to conduct an inspection.   + An inspection will take place within 30 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 Operations District (all five districts: South, North, East, West, and Central)   The GIS features to be displayed for a selected address are:   * Open zoning permits   + Data to be displayed on mouse-over = Permit #, Date Created, Applicant * Open construction permits   + Data to be displayed on mouse-over =Permit #, Date Created, Applicant * Open vacancy violations   + Data to be displayed on mouse-over =Violation #, Date Created, Applicant * Open vacant property licenses   + Data to be displayed on mouse-over =License #, Date Created, Applicant * Open property certifications   + Data to be displayed on mouse-over =Certification #, Date Created, Applicant * Open Salesforce cases for Case Record Type = Vacant House or Commercial * Data to be displayed on mouse-over = Case #, Date Created, Contact Name, Status   The GIS layers used but not displayed:   * 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. |
| **Actions** | 1. Bernice: Verify the SLA for vacant house versus vacant commercial. Are they the same? *From Adam Johnson on 03/28: Yes, they are the same*. 2. Adam: If squatters are on the property, will L&I go to the property to do the inspection? *From Adam Johnson on 03/28: L&I will conduct an inspection if there is a property maintenance issue. If the complaint is solely about squatters, this is a police matter. L&I will conduct necessary abatement work at any dangerous property, regardless if squatters are present.* 3. John: Change Daycare and Zoning to “L&I Operations District” instead of “L&I District”. *From John Kelly on 03/31: Done.* 4. Clinton or Joe: Are “dangerous violations” and “property certifications” available GIS features or available in the Hansen integration? 5. Steve and Clinton: Need to address question of duplicates in meetings with Streets and L&I. 6. Adam: If there is no access to rear of the property for inspection, what if anything should be done? *From Adam Johnson on 03/28: Inspectors will attempt to get in by contacting neighbors or by access trough the alleyway. If there is no safe entry, we will not be able to conduct an inspection, and the appropriate log will be entered in Hansen.* |

# Approvals after Requirements Definition Workshop

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