# 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 | 02/20/2014 | Revisions from Requirements Workshop | J. Kelly |
| 1.3 | 02/23/2014 | Peer Review Revisions Included | J. Kelly |
| 1,4 | 03/02/2014 | Revisions from Requirements Workshop | J. Kelly |
| 1.5 | 03/10/2014 | Revisions from Splitting Zoning Residential and Zoning Business Back into Two Separate Documents | J. Kelly |
| 1.6 | 04/07/2014 | Added responses to Action Items #1, 3, and 4. | J. Kelly |
| 1.7 | 04/25/2014 | Added Sheryl Johnson’s responses to Action Items #1 and 5. | J. Kelly |
| 1.8 | 05/29/2014 | Updated revised SLA | Sreelatha SK |
| 1.9 | 08/12/2014 | Updated based on follow-up session | M. Schmidt |
| 2.0 | 09/17/2014 | Zoning Commercial Service Request added | Sreelatha SK |

# 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** | Zoning Residential |
| **Record Type Description** | To report a property owner changing the use of a residential property without proper zoning. |
| **Process Overview** | 1. Constituent requests the service 2. The Agent creates a case by selecting the *Zoning 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 *Zoning 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** | | Zoning Residential | Refer to SLA Document | | Hansen | | Zoning Commercial | None | None | None | | 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** | | Zoning Residential | L&I Operations North District | Hansen | | Zoning Residential | L&I Operations South District | Hansen | | Zoning Residential | L&I Operations East District | Hansen | | Zoning Residential | L&I Operations West District | Hansen | | Zoning Residential | L&I Operations Central District | Hansen | | Zoning Commercial | L&I Operations North District | Hansen | | Zoning Commercial | L&I Operations South District | Hansen | | Zoning Commercial | L&I Operations East District | Hansen | | Zoning Commercial | L&I Operations West District | Hansen | | Zoning Commercial | L&I Operations Central District | Hansen | | L&I Request | L&I Exceptions (Vending Unit) | 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** | | Property Type | Multi-Picklist  **Values:** Single Home, Duplex, Triplex, Multi-Unit, High Rise, Co-Op  **Default:** | Yes | None | No | What type of property is it (single home, duplex, triplex, multi-unit, high rise, co-op)? | | Owner Occupied | **Values:** Yes, No, Unknown  **Default:** | Yes | None | No | Is the property occupied by the property owner? | | Improperly used as commercial | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #1 | No | Is the residential property being used as COMMERCIAL without proper zoning permits? | | 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 #1 | 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 *Property Improperly Used as Commercial* | For a commercial property being used as COMMERCIAL without proper zoning permits, submit a Zoning Commercial service request. | Evaluate the rule when a record is created, and every time it’s edited. | *Property Improperly Used as Residential* = ‘Yes’ | Display Message: “For a commercial property being used as COMMERCIAL without proper zoning permits, submit a Zoning Commercial service request.”  Automatically change the *~~Case Record~~ Service Request Type* = ‘Zoning Commercial’. | | 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 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 changing the use of a residential property without proper zoning. * Examples: An owner converting a single family dwelling into a duplex or multi-family without proper zoning/use permit; an owner fixing cars in his garage (not for a fee) without a proper zoning/use permit; an owner renting the basement or garage of a house without a proper zoning/use permit; or an owner parking his car on the property (not the driveway or sidewalk) or creating a parking space on the property without a proper zoning/use permit. * Contact fields: Enter the name and contact information of the customer reporting the illegal zoning.   + 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 zoning issue. * Advise the customer: * Once a request is entered into the system the business/property should be inspected within 30 business days and if appropriate a violation(s) issued by L&I. * Up 3 re-inspections may be conducted to ensure violations were complied or resolved. * If not complied at last inspection, property may be referred to court for a judgment. * To find out how a property is zoned: Refer the customer to the Zoning Map [http://www.phila.gov/Map?#id=757bbd2d07704a9bb684a1e88ca681c9](http://www.phila.gov/Map?%23id=757bbd2d07704a9bb684a1e88ca681c9) to determine the zoning designation. * The Zoning Maps do **NOT** represent a zoning evaluation or decision. For a definitive zoning decision or to find out what the zoning code listed for the property means, the customer can visi the Zoning Unit of Licenses and Inspections in the MSB, Concourse Level, Licenses and Inspections Website and click "zoning" or email [permit.services@phila.gov](mailto:permit.services@phila.gov). |
| **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 Operations Districts (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 zoning licenses   + Data to be displayed on mouse-over =License #, Date Created, Applicant * Open Salesforce cases for Case Record Type = Zoning 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. Graham will decide if SLA should be removed from the flow. *Per Graham Quinn on 03/28/14: This needs to go to Sheryl. 4/11/14 – Per Sheryl this will remain in the flow.* 2. Unisys to ensure SLA is added as a separate column on the Case Record Type that displays in the 311 Request Type section of the Global Search Results. 3. Bernice Johnson will confirm if the SLA should be officially changed to 20 days. *Per Sheryl Johnson 03/02/14: The SLA should stay at 30 days unless Philly311 receives a formal change.* 4. Sheryl Johnson will confirm they want the system to change the case to a Service Not Needed if the Address Key is NULL (currently the Call Center will not create an SR if the Address Key is not valid). *Per Sheryl Johnson on 04/04/14: The current process will remain the same. Please change from Service Not Needed to Service Not Rendered.* 5. Philly311 to review the L&I Exceptions (Vending Unit) service request mentioned above. Is this a separate service request that is not in the current list of the project’s service requests? *4/11/14 – Per Sheryl, this is a sub-category of the Zoning Business service request.* |

# Approvals after Requirements Definition Workshop

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