# ­­Version History­­­

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 02/06/2014 | Initial Draft Before Workshop | J. Kelly |
| 1.1 | 03/04/2014 | Revisions Before Requirements Workshop | J. Kelly |
| 1.2 | 03/06/2014 | Revisions After First Requirements Workshop | J. Kelly |
| 1.3 | 07/16/2014 | Modified SLA’s and Emergency | M. Schmidt |
| 1.4 | 07/22/2014 | Modified Record Type Name, Added ‘Emergency’ in Problem Category picklist, Added SLA details and Assignment Rule when Problem Category is ‘Emergency’, Updated Required, Rule#, History for ‘Is this a facility’ field | Sreelatha SK |
| 1.5 | 08/08/2014 | Updated based on follow-up session | M. Schmidt |
| 1.6 | 08/24/2014 | Updated with comments from PP&R. | M. Schmidt |
| 1.7 | 10/18/2014 | Case Record Type Description is modified w.r.t to UAT Issues Case # 05012260 | 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** | Parks & Recreation |
| **Record Type Name** | Parks and Rec Safety and Maintenance |
| **Record Type Description** | ~~To request maintenance or report unsafe conditions~~. Request maintenance or report a safety issue at a city park or recreation center. |
| **Process Overview** | 1. Constituent requests the service 2. The Agent creates a case by selecting the *Parks and Rec* *Safety and Maintenance* ***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 *Parks and Rec* *Safety and Maintenance* ***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 *Parks and Rec* *Safety and Maintenance* ***Queue*** representing the group of users responsible for resolving this type of service request (see Assignment Queue).    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** | | *Mechanical Maintenance* | Refer to SLA Document | | None | | *Janitorial Maintenance* | Refer to SLA Document | | None | | *Grounds Maintenance* | Refer to SLA Document | | None | | *Tree Maintenance* | Refer to SLA Document | | None | | *Programs* | Refer to SLA Document | | None | | *Emergencies* | Refer to SLA Document | | None | | *Problem Category* = ‘Emergency’ | 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** | | *Problem Category* = ‘Mechanical Maintenance’ | Mechanical Maintenance | < ? > | | *Problem Category* = ‘Janitorial Maintenance’ | Facility Maintenance--Janitorial | < ? > | | *Problem Category* = ‘Grounds’ | District Operations--Grounds | < ? > | | *Problem Category* = ‘Trees’ | District Operations--Trees | < ? > | | *Problem Category* = ‘Programs’ | Programs | < ? > | | *Problem Category* = ‘Emergency’ | 311 Contact Center | < ? > | | 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** | | Emergency | Picklist  **Values:** Yes, No  **Default:** | Yes |  | Yes | Is this an emergency such as Fire, Paramedic Response, Building Burglarized, Theft in progress, Vandalism in progress, Loss of life, Major Injury, Unauthorized Swimming in Pool | | Reported to 911 | Dependent Picklist  (Controlling field = *Emergency*)  **Values:** Yes, No  **Default:**  All values are shown if *Problem Emergency* = ‘Yes’ | Dependent | Workflow Rule #1 | Yes | Has the emergency been reported to 911? | | Problem Category | Picklist  Values: Grounds, Janitorial Maintenance, Mechanical Maintenance, Programs, Trees, Emergency  Default: | Yes | None | No | In which general category does the problem belong? | | Problem | Dependent Multi-Picklist  (Controlling field = *Problem Category*)  The following values are shown if *Problem Category* = ‘Mechanical Maintenance’  **Values:** Air Conditioning, Carpentry, Drain, Electrical Wires, Heat, Light, Lock, Masonry, Other, Painting, Pavement, Plaster, Playground Equipment, Roof, Sidewalk, Toilet, Wall, Roof, HVAC  The following values are shown if *Problem Category* = ‘Facility Maintenance--Janitorial’  **Values:** Floor, Glass, Grafitti, Litter, Odor, Restroom, Snow, Spill, Trash, Spill, Snow, Water  The following values are shown if *Problem Category* = ‘District Operations – Grounds’  **Values:** Ballfield, Grass, Landscape, Litter, Other, Restroom, Sinkhole, Snow, Special Event, Trail, Trash, Vegetation, Water  The following values are shown if *Problem Category* = ‘District Operations--Trees’  **Values:** Disease, Fallen Branches, Fallen Trees, Insects, Other, Planting, Pruning, Removal  The following values are shown if *Problem Category* = ‘Programs’  **Values:** Closed, Field Permit, Inadequate, League, Other  The following values are shown if *Problem Category* = ‘Emergency’  **Values:** Fire, Paramedic Response, Building Burglarized, Theft, Vandalism, Loss of life, Major Injury, Unauthorized Swimming in Pool | Yes | None | No | What type of problem is being reported? Describe the specific details of the problem in the Description field. | | Unsafe Condition | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #4 | No | Does the problem present an unsafe condition that could cause personal injuries or damages such as: Broken Pipe/Running Water, Electrical Hazard/Power Outage, Sink Hole, Open Unattended Building, Vandalized Building That Must be Secured, Vehicle in Waterway, Major Damage by Vehicle Accident, Major Play Equipment damage/Vandalism, Abandoned Vehicle in Park or Rec Center, Unauthorized Swimming in Pool, Any Damage that May Cause Physical Harm, Any Report of Injury | | Location Type | Picklist  **Values:** Park, Recreation Center, Playground, Cultural Instituion, Other Parks, Not Parks Related  **Default:** | Yes, | Workflow Rule #2 | No | In which type of location does the problem exist? | | Tree Between Sidewalk and Curb | DEPENDENT Picklist  (Controlling field = *Problem Category*)  Picklist  **Values:** Yes, No  **Default:** No  All values are shown if *Problem Category* = ‘Trees’ | No | Workflow Rule #3 | No | Is the tree between the sidewalk and the curb? | | Location Name | Text(255)  Autopopulated based on park and rec center names in GIS information. | Yes | None | No | What is the name of the park or recreation center? Use the Street Address if the name is unknown. | | Specific Problem Location | Text(255) | Yes | None | No | What is the specific location of the problem? (such as building number, street light number, parking lot number, mileage marker, restroom facility name, field, specific playground equipment, pool, etc.) | | Facility Manager Notified | Picklist  **Values:** Yes, No  **Default:** No | Yes | None | No | Was the location manager such as Recreation Center Leader, Maintenance Supervisor, or other person of authority notified of the problem? | | Date and Time | Text (100) | No | None | No | What is the date and time when the problem(s) were observed? |   **Validation Rules**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** | **Comments** | | 1 | Validation Rule for *Problem* | The *Problem* field is populated (not NULL) with the appropriate values after the Problem value is selected. |  |  |   **Workflow Rules**   | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | --- | --- | --- | --- | --- | --- | | 1 | Workflow Rule for *Reported to 911* | Emergency situation | Evaluate the rule when a record is created. | *Reported to 911* = ‘No’ | Display Message: “Immediately transfer caller to 911.  Automatically change Service Request Type to “Emergency” and save the case.  Automatically assign the case and then close it with a Close Reason = “Service Not Needed”. | | 2 | Workflow Rule for *Location Type* | If the problem is not in a park, recreation center, or auxiliary site, submit an L&I Maintenance Residential or Commercial. | Evaluate the rule when a record is created, and every time it’s edited. | *Location Type* = ‘Not Parks Related’ | Display Message: “If the problem is not in a park, recreation center, or auxiliary site, submit an L&I Maintenance Residential or Commercial.”  Automatically change the *Case Record Type* to “Maintenance Residential or Commercial”. | | 3 | Workflow Rule for *Tree Between Sidewalk and Curb* | If the tree is between the sidewalk and the curb, submit a Street Trees service request. | Evaluate the rule when a record is created, and every time it’s edited. | *Tree Between Sidewalk and Curb* = ‘Yes’ | Display Message: “If the tree is between the sidewalk and the curb, submit a Street Trees service request.”  Automatically change the *Case Record Type* to “Street Trees”. | | 4 | Municipal Radio | If this is an Unsafe Condition, send an email to Municipal Radio and Parks & Rec. | Evaluate the rule when a record is created, and every time it’s edited. | *Unsafe Condition* = ‘Yes’ | Send email to Municipal Radio and Parks & Rec. | |
| **Escalation Rule** | TBD |
| **Agent Instructions** | * Purpose: To report a problem at a park or recreation center. * Contact fields: Enter the the customer’s name and contact information.   + 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 department 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 name or address of the Park or Recreation Center, or other facility.   + Verify that you entered the address correctly by repeating the address back to the customer. * Description field: Enter specific details about the reported problem. * Advise the customer: * If the property is not owned by the City of Philadelphia Parks and Recreation Department, this is a private property issue and the customer should contact the property owner. Private property to Maintenance Residential and commercial. * Grass Cutting request: The Recreation Maintenance Division will inspect the site. Refer to Service Request for SLA.  Grass cutting is done by city contractors.  Facilities are on a rotating two week schedule. * Hazardous Playground Condition request: The Recreation Maintenance Division will inspect the site and make safe within 24 hours.  Refer to Service Request for follow up SLA.  Repairs will be delayed if special parts/equipment are required. * Recreation Center Housekeeping request: The Recreation Maintenance Division will inspect the site and make safe within 24 hours. Refer to Service Request for follow up SLA. * Recreation Center Maintenance and Mechanical Problems: The Recreation Maintenance Division will inspect the site and make repairs. Refer to Service Request for SLA. * Park Safety and Maintenance Problems: Depending on the severity of the issue, Fairmount Park will schedule an inspection. Refer to Service Request for SLA. **To discuss further, a 3-1-1 Supervisor may contact Fairmount Park at 215-683-0221.**   + Dead Tree or Fallen Branches: The Recreation Maintenance Division will inspect the site and address the issue(s). Refer to Service Request for SLA. The Recreation Department works with Fairmount Park to determine proper ways to correct tree issues.   + If escalation is required due to dissatisfaction with the safety or maintenance problem, or not receiving a confirmation, escalate to a Philly311 Supervisor. |
| **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:   * Parks and Recreation Districts * Street Tree Districts * Emergency Management Priority One Roads * Tree Maintenance Districts * Orthophotography   The GIS features to be displayed for a selected address are:   * TBD   The GIS features used but not displayed are:   * Address Validation Service |
| **Other Information** |  |
| **Actions** | 1. Parks and Recreation Department – Review SLAs. 2. Parks and Recreation Department – What does agent tell customer if the property is NOT a Parks and Rec property? Information request? Add this information to the Agent Instructions. 3. Clinton and Tom – What assets can be pinpointed on the GIS map. (buildings, landmarks, paths, etc.) |

# Approvals after Requirements Definition Workshop

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