# 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 | 03/05/2014 | Revisions After Requirements Workshops | J. Kelly |
| 1.3 | 08/08/2014 | Updated based on follow-up session | M. Schmidt |
| 1.4 | 09/16/2014 | Added “Emergency Transfer” Service Request | Sreelatha SK |
| 1.5 | 10/18/2014 | Modified Tree Location field values w.r.t Support Case # 05012259 | 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** | Street Trees |
| **Record Type Description** | To request removing, pruning, or planting a tree beside a street. |
| **Process Overview** | 1. Constituent requests the service 2. The Agent creates a case by selecting the *Street Trees* ***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 *Street Trees* ***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 *Street Trees* ***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:   |  |  | | --- | --- | | See SLA | Business Days |  |  |  |  | | --- | --- | --- | | **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** | | Street Trees | Refer to SLA Document | | None | | Emergency Transfer | 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** | | Street Trees | Street Trees | < ? > | | Emergency Transfer | 311 Contact Center | None | | 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** | | Tree Down | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | Is the entire tree down? | | Loss of Life | DEPENDENT Picklist  (Controlling field = *Tree Down*)  Values = Yes, No  All values are shown if *Tree Down* = ‘Yes’ | No | Workflow Rule #1 | No | Has the tree caused a loss of life? | | Tree Trapping People in Cars | DEPENDENT Picklist  (Controlling field = *Tree Down*)  Values = Yes, No  All values are shown if *Tree Down* = ‘Yes’ | No | Workflow Rule #1 | No | Is the tree trapping people in cars? | | Tree Falling on People | DEPENDENT Picklist  (Controlling field = *Tree Down*)  Values = Yes, No  All values are shown if *Tree Down* = ‘Yes’ | No | Workflow Rule #1 | No | Is the tree failing on people? | | Tree on Downed Wire, Smoking or On Fire, or Wires on ground | DEPENDENT Picklist  (Controlling field = *Tree Down*)  Values = Yes, No  All values are shown if *Tree Down* = ‘Yes’ | No | Workflow Rule #1 | No | Is the tree on a downed wire which is smoking or on fire? Are any wires laying on the ground? | | Blocked Traffic | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #2 | No | Is the tree blocking traffic? | | Tree on Power Lines | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | Is the tree growing into the power lines? | | Blocked Sidewalk or Home Access | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Are fallen trees or tree limbs blocking the sidewalk or access to a home? | | Sidewalk Repair | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #4 | No | Is the request to repair a sidewalk disturbed by a street tree? | | Tree in Alley, Frontyard or Backyard | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | Is the tree in an alley, frontyard, or backyard? | | Property Owner | DEPENDENT Picklist  (Controlling field = *Tree in Alley, Frontyard or Backyard*)  **Values** = Yes, No  **Default:**  All values are shown if *Tree in Alley, Frontyard or Backyard* = ‘Yes’ | No | Workflow Rule #5, Workflow Rule #6 | No | Is the customer the owner of the property on which the tree is located? | | Request for Tree Maintenance | Multi-Picklist  **Values:** New Tree, Pruning, Removal, Other  **Default:** | Yes | None | No | Is the customer requesting a tree to be planted, pruned, or removed? | | Tree Inside Park or at Rec Center | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #7 | No | Is the request for a tree to be planted, pruned, or removed inside a park or at a recreation center? | | Tree on State-Owned Highway | Picklist  **Values:** Yes, No  **Default:**  Autopopulated based on the service address and GIS. | Yes | Workflow Rule #8 | No | Is the request for a tree to be plantned, pruned, or removed on a state-owned highway? | | Tree Location | Picklist  **Values:** Between Sidewalk and Curb, ~~On Side Street~~, In Median, From Private Property  **Default:** | Yes | Workflow Rule #9 | No | What is the location of the tree to be planted, pruned, or removed? | | How Many Trees | Number | Yes | None | No | How many trees are being reported? |   **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 *Tree Down* | If the tree is down, and the incident involves loss of life or is life threatening like trees trapping people in cars, trees falling on people or trees on downed wires that are now smoking or on fire, transfer the customer to 911. | Evaluate the rule when a record is created, and every time it’s edited. | Loss of Life = ‘Yes’ OR Tree Trapping People in Cars = ‘Yes’ OR Tree Falling on People = ‘Yes’ OR Trees on Downed Wire, Smoking/On Fire = ‘Yes’ | Display Message: “Hot transfer the customer to 911.”  . Automatically change the *Case Record Type* to “Emergency Transfer” and close case | | 2 | Workflow Rule for *Blocked Traffic* | If the tree is blocking traffic, and GIS/Emergency Management Priority One Roads determines that this is a highway or major road, then take information for Service Request. | Evaluate the rule when a record is created, and every time it’s edited. | *Blocked Traffic* = ‘Yes’ | Display Message: “Case is handled by Municipal Radio.”  Send email to Municipal Radio  Automatically assign the case. Do NOT close the case. Leave the status Open. | | 3 | Workflow Rule for *Blocked Sidewalk or Home Access* | Fallen trees or tree limbs that are blocking the sidewalk or access to a home are emergencies and must be called into Municipal Radio for assistance with dispatching Street Tree Crews. | Evaluate the rule when a record is created, and every time it’s edited. | *Blocked Sidewalk or Home Access* = ‘Yes’ | Display Message: “Case will be dispatched by Municipal Radio.”  Send email to Municipal Radio  Automatically assign the case. Do NOT close the case. Leave the status Open. | | 4 | Workflow Rule for *Sidewalk Repair* | Sidewalk repair is the property owner’s responsibility. | Evaluate the rule when a record is created, and every time it’s edited. | *Sidewalk Repair* = ‘Yes’ | Display Message: “Sidewalk repair is the property owner’s responsibility. Change the case record type to Dangerous Sidewalk.”  Automatically change the *Case Record Type* to “Dangerous Sidewalk”. | | 5 | Workflow Rule for *Property Owner (Yes)* | Trees that are located in a alley or in a frontyard/backyard are not the City's responsibility.  They are the responsibility of the property owner, regardless of the situation. | Evaluate the rule when a record is created, and every time it’s edited. | *Tree in Alley, Frontyard or Backyard* = ‘Yes’ AND *Property Owner* = ‘Yes’ | Display Message: “Trees that are located in a alley or in a frontyard/backyard are not the City's responsibility.  It is the responsibility of the property owner, regardless of the situation.”  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”. | | 6 | Workflow Rule for *Property Owner (No)* | If the tree is located in an alley or in a frontyard/backyard but do not belong to the property owner, submit a Maintenance Residential or Commercial service request. | Evaluate the rule when a record is created, and every time it’s edited. | *Tree in Alley, Frontyard or Backyard* = ‘Yes’ AND *Property Owner* = ‘No’ | Display Message: “If the tree is located in an alley or in a frontyard/backyard but do not belong to the property owner, submit a Maintenance Residential or Commercial service request.”  Automatically change the *Case Record Type* to “Maintenance Residential or Commercial”. | | 7 | Workflow Rule for *Tree Inside Park or at Rec Center* | If the tree maintenance request is for a park or at a recreation center, submit a Parks and Rec Safety and Maintenance service request. | Evaluate the rule when a record is created, and every time it’s edited. | Workflow Rule for Tree *Inside Park or at Rec Center* = ‘Yes’ | Display Message: “If the tree is in a park or at a recreation center, submit a Parks and Rec Safety and Maintenance service request.”  Automatically change the *Case Record Type* to “Parks and Rec Safety and Maintenance”. | | 8 | Workflow Rule for *Tree on State-Owned Highway* | If the tree maintenance activity is requested for a tree on a state-owned highway, call PennDOT. | Evaluate the rule when a record is created, and every time it’s edited. | *Tree on State-Owned Highway* = ‘Yes’ | Display the message: “Tell caller to contact PennDOT at (717) 214-4035”  Automatically change *Service Request Type* to “Service Not Needed’ and save the case.  Automatically assign the case. Do NOT close the case. Leave the status Open. | | 9 | Workflow Rule for *Tree Location* | A tree may be planted, pruned, or removed ONLY if it is located between the sidewalk an curb, in the grass planting strip immediately adjacent to curb, or in the median. | Evaluate the rule when a record is created, and every time it’s edited. | *Tree Location* = ‘Other’ | Display Message: “A tree may be planted, pruned, or removed ONLY if it is located between the sidewalk an curb, in the grass planting strip immediately adjacent to curb, or in the median.”  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** | See workflows for escalations to the Philly311 Supervisor. |
| **Agent Instructions** | * Purpose: To request removing, pruning, or planting a tree beside a street. * Contact fields: Enter the the customer’s name, address 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 address associated with the tree.   + Verify that you entered the address correctly by repeating the address back to the customer. * Description field: Enter any additional information about the location or problems with the tree, or the description of the tree. * For emergency situations an inspector will assess the situation within 24 hours. * For non-emergency situations, advise the customer:   + Once a request is entered into the system the Fairmount Park Street Tree Office will inspect the site within 15 business days.  All tree work is prioritized based on condition of tree, date added to the list as well as resources available. Removal: 12-18 months. Pruning: 18-24 months. Planting: Spring (between March and June) or Fall (between October and January) but no other time of the year.   + If the customer has already entered a case, the tree has already been inspected and they have received a letter confirming, Street Tree Management will provide no further follow up information, no exact dates and customer must wait until service takes place. Do not take another case for the same tree issue.   + If escalation is required due to dissatisfaction with the street tree management service, 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, Closed |
| **ESRI/GIS Information** | The GIS layers to be displayed for the service request Location are:   * Parks and Recreation Districts * Street Tree Districs * Emergency Management Priority One Roads * Tree Maintenance Districts   The GIS features to be displayed for a selected address are:   * Parks * Recreation Centers   The GIS features used but not displayed are:   * Address Validation Service |
| **Other Information** |  |
| **Actions** | 1. Parks Dept: For the Tree on State-Owned Highway workflow -- Verify that PennDOT wants customers to call them at that number about tree maintenance. |

# Approvals after Requirements Definition Workshop

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