# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/22/2014 | Initial Draft Before Workshop | M. Schmidt |
| 1.1 | 01/27/2014 | Draft After Initial Workshop | J. Kelly |
| 1.2 | 02/04/2014 | Reviewed draft | M. Schmidt |
| 1.3 | 02/05/2014 | Draft After Second Workshop | J. Kelly |
| 1.4 | 02/12/2014 | Design-Related Changes | J. Kelly |
| 1.5 | 02/14/2014 | Design Change to Process Overview | J. Kelly |
| 1.6 | 03/05/2014 | Removed Question Marks from Field Labels, Verified Field Label Character Limit, Shortened Field Label for “Has a Utility Company Worked at Location”. | J. Kelly |
| 1.7 | 04/17/2014 | Added Streets Department response to Action Item #1. | J. Kelly |
| 1.8 | 06/16/2014 | Updated to address UGSI questions | M. Schmidt |
| 1.9 | 07/17/2014 | Updated Workflow for Pothole Repair Service Request type | Sreelatha SK |
| 1.10 | 08/14/2014 | Updated based on follow-up session | M. Schmidt |
| 1.11 | 08/20/2014 | Updated based on client feedback | M. Schmidt |
| 1.12 | 12/03/2014 | Added Push-up and Depression | 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 Ditch Repair and Cave-In Repair requirements definition documents have been integrated into this requirements document.**

# Requirements

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| **Department** | Streets Department |
| **Record Type Name** | Street Defect |
| **Record Type Description** | Make a request to have a pothole, ditch, or cave-in repaired |
| **Process Overview** | 1. Constituent requests the service 2. The Agent creates a case by selecting the *Street Defect* *Repair* ***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 Defect Repair* ***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 CityWorks.    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** | | Pothole Repair | Refer to SLA Document | | CityWorks | | Ditch Repair | Refer to SLA Document | | CityWorks | | Cave-In Repair | Refer to SLA Document | | CityWorks | | Service Not Needed | N/A | N/A | N/A |   **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** | | Pothole Repair | Inspector | Stephen Lorenz | | Ditch Repair | Inspector | Stephen Lorenz | | Cave-In Repair | Inspector | Stephen Lorenz | | 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** | | Defect Type | Picklist  **Values:** Crack, Depression, Hole, Push-up  **Default:** | Yes | Workflow Rule #1 | No | *Provide a link to the help article in the flow text* | | Gas Escaping from the Hole | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #2 | No | Is gas escaping from the hole? | | Running Water from hole | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Is there running water in the hole (if so, probably a cave-in from a broken sewer line). | | On Interstate Highway | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #4 | No | Is the hole on an interstate highway (I-95, I-76, I-676)? | | Has a Utility Company been recently working at the location | Picklist  **Values:** Yes, No  **Default:** | Yes |  | No | Has a utility company been recently working at the site of the hole? | | Utility Company | Picklist  **Values:** PWD, PGW, PECO, Not Known  **Default:** | No | Validation Rule #1  Workflow Rule #5  Workflow Rule #6 | No | If a utility company has recently been working at the site of the hole, which utility company? | | Driving or Parking Lane | Picklist  **Values:** Driving, Parking  **Default:** | Yes | None | No | Is the hole in the driving lane of the street or in the parking lane? | | Shape | Dependent Picklist  (Controlling field = *Shape*)  **Values:** Irregular-Shaped, Bowl-Shaped, Rectangular or Square  **Default:**  All values are shown if *Shape* = ‘Crack’ OR ‘Hole’ | Yes | Workflow Rule #7 | No | What is the shape of the hole or impression? If bowl or irregular-shaped, the hole is a pothole or cave-in. If rectangular or square, the hole is a ditch. | | Pothole | Dependent Picklist  (Controlling field = *Shape*)  **Values:** Yes, No  **Default:**  All values are shown if *Shape* = ‘Irregular-Shaped’ OR ‘Bowl-Shaped’ |  | Workflow Rule #8  Workflow Rule #9 |  | Is it a pothole (otherwise it is a cave-in)? |   **Validation Rules**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** | **Comments** | | 1 | Validation Rule *Utility Company* | If *Has a Utility Company Worked at the Location* = ‘Yes’, then *Utility Company* is enabled. Otherwise, *Utility Company* is disabled (grayed out). |  | If *Utility Company* is enabled, it is a required field. |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow for *Street Defect - Depression* | A depression is its own Service Request Type | Evaluate the rule when a record is created, and every time it’s edited. | *Street Defect* = ‘Depression’ | Automatically change the *Service Request Type* to “Depression”. | | 2 | Workflow for *Street Defect – Push-up* | A depression is its own Service Request Type | Evaluate the rule when a record is created, and every time it’s edited. | *Street Defect* = ‘Push-up’ | Automatically change the *Service Request Type* to “Push-up”. | | 2 | Workflow Rule *Gas Escaping from the Hole* | If gas is escaping from the hole, then call 911. | Evaluate the rule when a record is created, and every time it’s edited. | *Gas Escaping from the Hole = ‘Yes’* | Display message: “Make a hot transfer to 911.”  Close this case. | | 3 | Workflow Rule *Running Water* | If there is running water in a hole, then call the Water Department at 215-685-6300 (open 24 hours a day/7 days a week). | Evaluate the rule when a record is created, and every time it’s edited. | *Running Water* = ‘Yes’ | Display message: “If there is running water in the hole, then call the Water Department at 215-685-6300 (open 24 hours a day/7 days a week).”  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”. | | 4 | Workflow Rule *On Interstate Highway* | If a hole is on a state highway, then it is filled by Pennsylvania Department of Transportation (PennDOT). | Evaluate the rule when a record is created, and every time it’s edited. | *On State Highway* = ‘Yes’ | Display message: “If a hole is on an interstate highway (I-95, I-76, I-676), then it is filled by Pennsylvania Department of Transportation (PennDOT). Call PennDOT at 1-800-FIX-ROAD.”  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”.  Information request = ‘Yes”. Close this case. | | 5 | Workflow Rule *Utility Company* Known | If a utility company has recently worked at the site of the hole, then the constituent should contact the utility company. | Evaluate the rule when a record is created, and every time it’s edited. | *Utility Company <> ‘Not Known’* | Display message: “If a utility company has recently worked at the site of the hole, then the constituent is responsible for contacting the utility company.”  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”.  Information request = ‘Yes”. Close this case. | | 6 | Workflow Rule *Utility Company* NotKnown | If the utility company is not known it becomes a Streets – Other issue. | Evaluate the rule when a record is created, and every time it’s edited. | *Utility Company = ‘Not Known’* | Display Message: “This is case goes to Streets - Other.”  Automatically change the *Case Record Type* to “Streets - Other”. | | 7 | Workflow Rule for *Shape* | If the hole is manmade it is a ditch. | Evaluate the rule when a record is created, and every time it’s edited. | *Shape* = ‘Rectangular or Square’ | Display message: “The system has changed the Service Request Type to Ditch Repair.”    Automatically change the *Service Request Type* = ‘Ditch Repair.’ | | 8 | Workflow Rule for *Pothole* | Customer reports defect is a pothole | Evaluate the rule when a record is created, and every time it’s edited. | *Pothole* = ‘Yes’ | Display message: “The system has changed the Service Request Type to Pothole.”    Automatically change the *Service Request Type* = ‘Pothole’ | | 9 | Workflow Rule for *Cave-in* | Customer reports defect is a cave-in | Evaluate the rule when a record is created, and every time it’s edited. | *Pothole* = ‘No’ | Display message: “The system has changed the Service Request Type to Cave-in.”    Automatically change the *Service Request Type* = ‘Cave-in’ | | 10 | Workflow Rule for *Redress* | If the Streets Department closes a case as completed, and a constituent disagrees that the problem associated with that case was fixed, the constituent has 30 days to report the problem to 311 and the Streets Department will inspect the problem again. The same case will be reopened with a status of “Redress”. After 30 days, a new case must be opened. | Evaluate the rule when a record is created, and every time it’s edited. | If Case Status = ‘Closed’ AND Current Date – Case Opened Date <= 30 | Case is treated as a redress. | |
| **Assignment Queue** | **Salesforce Queue:** INSPECTOR Queue  **Queue Members:** TBD |
| **Escalation Rule** | TBD |
| **Agent Instructions** | * Purpose: To report a pothole, cave-in, or ditch for repair. * Potholes are bowl-shaped openings up to 10 inches deep. They occur when the top layer of the road has worn away, exposing the concrete base. * Cave-ins (also called sinkholes) reach past the concrete base of the road. This void can occur when the dirt below the concrete base has washed away, causing the upper surfaces to fall through. * Ditches are rectangular excavations in the road made by utilities and plumbers to reach underground lines. The contractors are responsible for filling the ditch and paving it temporarily and notifying the city upon completion. The Highways Division then schedules a permanent repair to the road. If a ditch is not backfilled properly, it will wash out or sink in, leaving a large hole. * **Contact** information is required in case Streets Department must reach out for further information. * **Service Address** is the exact address or intersection where problem is located. It may be a street address near where the problem is located, or an intersection. * In the **Description** field, provide any additional information that will help the Streets Department locate and identify the problem. * Advise constituent: * When a work order is closed, and a new problem is reported at that same location, if 7 calendar days have passed the Streets Department will create a new work order for the problem at that location. * Redress: If the Streets Department closes a case as completed, a constituent disagree that the problem associated with that case was fixed, the constituent can report the problem to 311 and the Streets Department will inspect the problem again. Current Process – 311 handles this as a new service request. System can calculate if the request is less than 30 days. If Redress? (1) Case must be same issue, status of closed, and less than 30 days, then agent can change the status of the change to Redress, which triggers an email to the Streets Dept. If more than 30 days, open a new service request – cannot change Redress to ‘Yes’. * Some problems are repaired by outside agencies:   + If there is gas escaping from the hole, then 911 should be called immediately.   + If there is water running through the hole, then it is serviced by the Water Department.   + If the hole is on am interstate highway, then it is filled by Pennsylvania Department of Transportation (PennDOT). * Pothole Customer Service Standard:   + Initial complaints will be investigated within 24 hours when called in before 2 PM, and can take up to 3 business days to repair when completed by the Streets Department. Potholes filled by a non-city agency may take longer to fill.   + Response time of 3 business days (Requests reported by 2 p.m. Monday through Friday will be repaired within 3 business days)   + Redress - The Streets Department will notify customers if the repair is not made within 3 days.   + If the pothole request is forwarded to an outside agency or if the pothole is reclassified, the Streets Department will contact the customer to advise of the SLA change. |
| **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** | Layers:   * Roads (City, State, Private)   See Actions section below. |
| **Other Information** |  |
| **Actions** | Determine any relevant ESRI layers to display. *Per Tamalar Geiger on 04/17/14: None.* |

# Approvals after Requirements Definition Workshop

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