# 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 | 01/28/2014 | Added Question about Waste Basket Pickup | J. Kelly |
| 1.3 | 01/30/2014 | Modified Workflow Actions | M. Schmidt |
| 1.4 | 02/04/2014 | Modified Fields and Workflow Actions | M. Schmidt/J. Kelly |
| 1.5 | 02/12/2014 | Design-Related Changes | J. Kelly |
| 1.6 | 02/14/2014 | Design Change to Process Overview Section | J. Kelly |
| 1.7 | 03/19/2014 | Revisions Based on Tammi Geiger’s review comments emailed on 03/10/2014; Removed question marks from field labels; Shortened field labels, initial-capped field labels; Revised some wording in Agent Instructions; Changed “constituent” to “customer”; changed Sanitation District help text. | J. Kelly |
| 1.8 | 4/22/2014 | Updated Workflow Rules | M. Schmidt |
| 1.9 | 4/23/2014 | Changed to “No More than Max Number of Containers/Bags” field label to “No More than Max Num of Containers/Bags” because of character limitations. Changed the Proper Recycling Container field to be a dependent picklist. Corrected the validation rule number. Added an error message for the Validation Rule for Proper Recycling Container. | J. Kelly |
| 1.10 | 04/29/2014 | Changed help text for Single Address or Whole Block field to “One address or multiple addresses on the block.” | J. Kelly |
| 1.11 | 06/05/2014 | Added Redress Change, 2 fields renamed w.r.t Support case # 00002856 change | Sreelatha SK |
| 1.12 | 06/16/2014 | Updated based on UGSI questions |  |

# 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** | Streets Department |
| **Record Type Name** | Rubbish/Recyclable Material Collection |
| **Record Type Description** | Make a request to have rubbish and/or recyclable material collected |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Rubbish/Recyclable Material Collection* ***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 *Rubbish/Recyclable Material Collection* ***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, In-Progress, Escalated, On Hold, and Closed | New | | Case Origin | Phone, Email, Web | Phone | | Priority | High, Medium, Low | Medium | |

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| **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** | | Rubbish Collection | 2 | Business Days | CityWorks | | Recyclables Collection | 2 | Business Days | 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** | | Rubbish/Recyclable Material Collection | Sanit Ops | CityWorks Interface | | 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** | | Type of Collection Missed | Picklist  **Values:** Rubbish, Recycling, Both  **Default:** | Yes | None | No | What collection items were missed. | | Single Address or Whole Block | Picklist  **Values:** Single Address, Block  **Default:** | Yes | None | No | One address or multiple addresses on the block. | | Where Was Trash Set Out | Picklist  **Values:** Curbside, Common Driveway, Alley, Other  **Default:** | Yes | Workflow Rule #1 | No | A common driveway is shared by multiple properties, usually at the rear of the property. Curbside is at the curb edge of the property. | | Set Out in Time | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #2 | No | From October 1 through March 31, trash and recycling should be set out between 5:00 PM the night before collection day and 7:00 AM the day of collection. Set-out times from April 1 to September 30 will return to 7:00 PM the night before and by 7:00 AM the day of collection. | | ~~No More than Max Num of Containers/Bags~~  Is it more than Max Num of Cans/Bags? | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Single-family household is allowed a maximum of four (4) 32 gallon containers or eight (8) 30 – 32 gallon bags of trash each week. All other premises are allowed a maximum of six (6) 32 gallon containers or twelve (12) 30 - 32 gallon bags. | | ~~Not More than Maximum Weight~~  Is it more than the allowed weight? | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #4 | No | The weight limit for a bag or can is 40 lbs. The total weight should not exceed 240 lbs. | | Construction/Bulk Items | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #5 | No | Rubbish cannot contain construction debris, house/apartment clean out, bulk items, bricks etc. | | Is Trash in Wastebasket | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #7 | No | A receptacle for disposal of litter and recyclables, usually in high pedestrian traffic areas | | Includes Household Hazardous Waste | Picklist  **Values:** None, Household Hazardous Waste, Commercial Hazardous Waste  **Default:** | Yes | Workflow Rule #8 | No | Household Hazardous Waste examples: oil based paint, fluorescent light tubes, Compact Fluorescent Lights (CFLs), computer equipment, TVs. Commercial Hazardous Waste examples: chemical waste, spilled oil, abandoned oil drums | | Proper Recycling Container | DEPENDENT Picklist  (Controlling field = *Type of Collection Missed)*  Values = Yes, No  All values are shown if *Type of Collection Missed* = ‘Recycling’ or ‘Both’ | No | Validation Rule #1 | No | All containers must have a tight fitting lid or be secured in such a way as to prevent refuse from being carried away by the elements. Set out may be in metal or other non-corrodible cans, no larger than 32 gallons, or in substantial, leak-proof bags, no smaller than 30 gallons and no larger than 32 gallons. | | Pickup Day | Text (10) | No | Workflow Rule #9 | No | Auto-polulated from GIS data | | Sanitation District | Text(25) | No |  |  | Auto-polulated from GIS data |   **Validation Rules**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** | **Comments** | | 1 | Validation Rule for *Proper Recycling Container* | If *Type of Collection Missed* = ‘Recycling’ OR ‘Both’, then *Proper Recycling Container* is enabled. Otherwise, *Proper Recycling Container* is disabled (grayed out). | You must enter a value when Type of Collection Missed is either ‘Recycling’ or ‘Both’. | If *Proper Recycling Container* is enabled, then it is a required field. |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *Where Was Trash Set Out* | If the customer did not meet the compliance criteria, a Service Request is not created. | Evaluate the rule when a record is created, and every time it’s edited. | *Where Was Trash Set Out* = ‘Other’ | 1) Display message: “Refuse containers should be set out on the sidewalk adjacent to the curb or adjacent to the driveway where there is driveway collection..”  2) Automatically set *Service Request Type* to “Service Not Needed’ and save the case.  3) Automatically assign the case and then close it with a *Close Reason* = “Service Not Needed”. | | 2 | Workflow Rule for *Set Out in Time* | If the customer did not meet the compliance criteria, a Service Request is not created. | Evaluate the rule when a record is created, and every time it’s edited. | *Set Out in Time* = ‘No’ | 1) Display message: “From October 1 through March 31, trash and recycling should be set out between 5:00 PM the night before collection day and 7:00 AM the day of collection. Set-out times from April 1 to September 30 will return to 7:00 PM the night before and by 7:00 AM the day of collection.”  2) Automatically set *Service Request Type* to “Service Not Needed’ and save the case.  3) Automatically assign the case and then close it with a *Close Reason* = “Service Not Needed”. | | 3 | Workflow Rule for *No More than Max Num of Containers/Bags* | If the customer did not meet the compliance criteria, a Service Request is not created. | Evaluate the rule when a record is created, and every time it’s edited. | *No More than Max Num of Containers/Bags* = ‘No’ | 1) Display message: “Single-family household is allowed a maximum of four (4) 32 gallon containers or eight (8) 30 – 32 gallon bags of trash each week. All other premises are allowed a maximum of six (6) 32 gallon containers or twelve (12) 30 - 32 gallon bags.”  2) Automatically set *Service Request Type* to “Service Not Needed’ and save the case.  3) Automatically assign the case and then close it with a *Close Reason* = “Service Not Needed”. | | 4 | Workflow Rule for *Not More than Maximum Weight* | If the customer did not meet the compliance criteria, a Service Request is not created. | Evaluate the rule when a record is created, and every time it’s edited. | *Not More than Maximum Weight* = ‘No’ | 1) Display message: “The weight limit for a bag or can is 40 lbs. The total weight should not exceed 240 lbs.”  2) Automatically set *Service Request Type* to “Service Not Needed’ and save the case.  3) Automatically assign the case and then close it with a *Close Reason* = “Service Not Needed”. | | 5 | Workflow Rule for *Construction/Bulk* | If the customer did not meet the compliance criteria, a Service Request is not created. | Evaluate the rule when a record is created, and every time it’s edited. | *Construction/Bulk Items* = ‘Yes’ | 1) Display message: “Rubbish cannot contain construction debris, house/apartment clean out, bulk items, bricks etc.”  2) Automatically set *Service Request Type* to “Service Not Needed’ and save the case.  3) Automatically assign the case and then close it with a *Close Reason* = “Service Not Needed”. | | 6 | Workflow Rule for *Proper Recycling Container* | If the customer did not meet the compliance criteria, a Service Request is not created. | Evaluate the rule when a record is created, and every time it’s edited. | Proper Recycling Container = ‘No’ | 1) Display message: “All containers must have a tight fitting lid or be secured in such a way as to prevent refuse from being carried away by the elements. Set out may be in metal or other non-corrodible cans, no larger than 32 gallons, or in substantial, leak-proof bags, no smaller than 30 gallons and no larger than 32 gallons..”  2) Automatically set *Service Request Type* to “Service Not Needed’ and save the case.  3) Automatically assign the case and then close it with a *Close Reason* = “Service Not Needed”. | | 7 | Workflow Rule for *Is Trash in Wastebasket* | If the rubbish is in a wastebasket a Novo case must be created. | Evaluate the rule when a record is created, and every time it’s edited. | If *Is Trash in Wastebasket* = ‘Yes’ | Automatically change the *Case Record Type* = ‘Other (Streets)’. | | 8 | Workflow Rule for *Includes* *Household Hazardous Waste* | If trash includes Household Hazardous Waste (HHW), list the HHW items in the Description field and advise the customer about HHW events. | Evaluate the rule when a record is created, and every time it’s edited. | *Includes* *Household Hazardous Waste* <> ‘None’ | 1) Display message: “Handling and disposing of hazardous waste materials requires a special set of regulations due to the potential damage they can cause to people, pets and the environment. Residents can bring their hazardous waste to Household Hazardous Waste Events. All events are open from 9am to 3pm. Refer to <http://www.philadelphiastreets.com/events/household-hazardous-waste-events> for a list of currently scheduled events”  2) Automatically set *Service Request Type* to “Service Not Needed’ and save the case.  3) Automatically assign the case and then close it with a *Close Reason* = “Service Not Needed”. | | 9 | Workflow Rule for *Pickup Day* with Time Trigger | If before 7pm on day of caller pickup, do not save, tell caller to wait. | Evaluate the rule when a record is created | If *Pickup Day* = TODAY and Time of Day < 7:00pm | 1) Display message: “Advise caller to wait until after 7:00pm to report missed pickup.”  2) Automatically set *Service Request Type* to “Service Not Needed’ and save the case.  3) Automatically assign the case and then close it with a *Close Reason* = “Service Not Needed”. | | 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 | Set Case Status = ‘Redress’ | |
| **Escalation Rule** | TBD |
| **Agent Instructions** | * Purpose: To request a rubbish/recycling pickup. * **Contact** fields: Enter the customer’s name, address and phone number. * **Service Address** fields: Enter the exact legal address of the property. * **Description** field: Enter any additional information about the request. * **Advise the customer**: * Collection Time: The Streets Department collects trash, rubbish, and recycling throughout the day, up to 7 PM. If the entire street was missed and it is not yet 7 PM, advise the customer to submit the request after 7 PM if the pickup did not occur. * Mattresses and box springs must be bagged and sealed in plastic mattress bags in order to be collected. Mattresses and box springs that are **not** properly bagged will **not** be collected nor accepted at our Sanitation Convenience Centers. Mattress bags are available at many retail stores and on-line. * Regular Collection: From October 1 through March 31, trash and recycling should be set out between 5:00 PM the night before collection day and 7:00 AM the day of collection. Set-out times from April 1 to September 30 will return to 7:00 PM the night before and by 7:00 AM the day of collection. * Early Collection: (Vine St. to Bainbridge St., from Schuylkill River to Delaware River): From October 1 through March 31 set out trash and recycling between 6 pm the night before collection day and 6 am on the day of collection. From April 1 through September 30 set out between 8 pm the night before collection day and 6 am on the day of collection at your regularly authorized pickup site. * Holiday Collection: The City observes 11 holidays when trash and recycling collection will be one day behind schedule for the remainder of the week. This does not include disturbances from weather and road closures. The holiday schedule is at <http://www.philadelphiastreets.com/sanitation/residential/collection-schedules>. * Snow storms may delay trash and recycling collections. Customers must set their collections out for pick up at curbside on their regularly scheduled trash day, placing items at curbside as crews navigate through the snow, and on top of snow mounds so they are visible to crews. * Recycling Day: The customer can go to <http://citymaps.phila.gov> and type in their address in the search bar to find out their trash and recycling day. * Wood scraps and other loose items must be securely tied into bundles no more than four feet long and two feet thick. * Cardboard boxes may never be used as containers for trash, regardless of who collects it. * Trash Containers: A single-family household is allowed a maximum of four (4) 32 gallon containers or eight (8) 30 – 32 gallon bags of trash each week. All other premises are allowed a maximum of six (6) 32 gallon containers or twelve (12) 30 - 32 gallon bags. The resident is responsible for providing the collection containers; there are no City-provided containers. * The weight limit for a bag or can is 40 lbs. The total weight should not exceed 240 lbs. * Recycling Containers: The City collects both trash and recycling on the same day. For recycling, the customer can use any sturdy plastic or metal container that holds 32 gallons or less; just mark it with the word "RECYCLING" on its side. If one bin is not enough to hold all recyclables, simply add another one. The customer can put all recyclables together in one bin--cans, glass, mixed paper, cardboard and most plastic containers--no need to sort or separate them. * Redress: If a surveyed citizen says that the original request was not completed, a “Redress” service request is submitted. In order to submit a Redress, the original request has to be closed by the Department and cannot be more than 30 days old. The Streets Department will pick up any missed Redress collections on the next day. |
| **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, In-Progress, Escalated, On Hold, Redress, and Closed |
| **ESRI/GIS Information** |  |
| **Other Information** |  |
| **Actions** |  |

# Approvals after Requirements Definition Workshop

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