# 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 | 02/05/2014 | Review and Update | M. Schmidt |
| 1.3 | 02/09/2014 | Revised Agent Instructions Section | J. Kelly |
| 1.4 | 02/12/2014 | Minor Format Changes | J. Kelly |
| 1.6 | 02/14/2014 | Design Change to Process Overview Section | J. Kelly |
| 1.7 | 02/28/2014 | Changes incorporated after discussion with City | M. Schmidt  Sreelatha SK |
| 1.8 | 03/11/2014 | Removed Question Marks from Field Labels, Reworded the Field Labels | J. Kelly |
| 1.9 | 03/27/2014 | Changed Field Type of Is Light on Public Property from “Dependent Picklist” to “Picklist” | J. Kelly |
| 1.10 | 3/28/2014 | Updated Workflow Rules | M. Schmidt |
| 1.11 | 04/16/2014 | Added Streets Department responses to Action Items #1 and 2. | J. Kelly |
| 1.12 | 04/17/2014 | Added Streets Department responses to Action Items #2 and 3. | J. Kelly |
| 1.13 | 04/29/2014 | Made these two fields required rather than optional: Is Light Illuminating a Parking Lot, and Is Light on Public Property. | J. Kelly |
| 1.14 | 07/9/2014 | Deleted changes to ‘Is Light on Public Property’ | Sreelatha SK |
| 1.15 | 08/14/2014 | Updated based on follow-up session | M. Schmidt |
| 1.16 | 12/03/2014 | Changed wording in Agent Instructions | 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).

# Requirements

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| **Department** | Streets Department |
| **Record Type Name** | Street Light Outage |
| **Record Type Description** | Make a request to have a street light repaired |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Street Light Outage* ***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 Light Outage* ***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.    5. If Hazardous = ‘Yes’, send an email to Municipal Radio. |
| **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 | 1,2,3,4,5,6,7,8,9 | 5 | |
| **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 Light Outage | Refer to SLA Document | | CityWorks | | Street Light Other | Refer to SLA Document | | CityWorks | | 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 Light Outage | Contractor | Richard Montanez~~.~~ | | Street Light Other | Street Light | Richard Montanez— | | Service Not Needed | 311 Contact Center |  |   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** | | Is Light a Traffic Signal | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #1 | No | Is the light a red, yellow, and green traffic signal at an intersection? | | Is Light Illuminating an Alley | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #2 | No | Is the light in front of the property not on the street rather than in an alley or driveway? | | Is Light Illuminating a Parking Lot | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Is the light illuminating a Parking Lot? | | ~~Is Light on Public Property~~ | ~~Picklist~~  **~~Values:~~** ~~Yes, No~~  **~~Default:~~** | ~~Yes~~ | ~~Workflow Rule #4~~ | ~~No~~ | ~~Does this belong to Public Property? (under bridges, I-95, etc.)~~ | | Private Property | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #4A | No | Is this light on private property? Refer the ownership information from BRT. | | Is Light in a Park | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Is the light in a park, refer to GIS? | | Problem Type | Picklist  **Values:** Bulb Hanging, On All the Time, On and Off, On During Day, Out All the Time, Pole Down, Pole Leaning, Missing Bracket, Wire Down, Wires Sparking,  Request for New Lighting, Other  **Default:** | Yes | Workflow Rule #5  Workflow Rule #6 | No | The type of problem that is causing the street light outage. | | Hazardous | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #7, Workflow Rule #8 | No | Auto-filled |   **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 *Is Light a Traffic Signal* | If the light that is out is a traffic signal, then the problem should be reported as a Traffic Signal Emergency case. | Evaluate the rule when a record is created, and every time it’s edited. | *Is Light a Traffic Signal* = ‘Yes’ | Display Message: “Service Request has been changed to Traffic Signal Emergency Case.”    Automatically change the *Service Request Type* = ‘Traffic Signal Emergency’ | | 2 | Workflow Rule *Is Light Illuminating an Alley* | If the light that is out is not in front of the property on the street rather than in an alley or driveway, then the problem should be reported as an Alley Light Outage case. | Evaluate the rule when a record is created, and every time it’s edited. | *Is Light Illuminating an Alley* = ‘Yes’ | Display Message: “Service Request has been changed to an Alley Light Outage.”    Automatically change the *Service Request Type* = ‘Alley Light Outage’ | | 3 | Workflow Rule for *Is Light Illuminating a Parking Lot* | A light illuminating a Parking Lot is the responsibility of the Parking Lot owner. | Evaluate the rule when a record is created, and every time it’s edited. | *Is Light Illuminating a Parking Lot* = ‘Yes’ | Display message: “Refer to BRT to obtain ownership and give information to caller. Inform caller that the light is the owner’s responsibility”  Automatically set *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 for~~ *~~Public Property~~* | ~~If the problem is listed for Public Property, then it should be reported as a Public Property case.~~ | ~~Evaluate the rule when a record is created, and every time it’s edited.~~ | *~~Is Light on Public Property~~* ~~= ‘Yes’~~ | ~~1) Display message: “Refer caller to Public Property.”~~  ~~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 *Private property* | If the problem is listed for Private Property, then it should be reported as a Private Property case. | Evaluate the rule when a record is created, and every time it’s edited. | *Private Property* = ‘Yes’ | Display message: “Inform the caller that the light is the responsibility of the property owner.”  Automatically set *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 *Is Light in a Park?* | If the light that is out is in a park, then the problem should be reported to the Parks and Recreation Department. | Evaluate the rule when a record is created, and every time it’s edited. | *Is Light in a Park* = ‘Yes’ | Display Message: “Service Request has been changed to Parks Safety and Maintenance”  Automatically change the *Service Request Type* = ‘Parks Safety and Maintenance’. | | 7 | Workflow Rule for *Problem Type* Other | If the problem is not one listed for a Street Light Outage, then it should be reported as a Street Light (Other) case. | Evaluate the rule when a record is created, and every time it’s edited. | *Problem Type* = ‘Other’ or ‘Request for New Lighting’ | Display Message: “Service Request has been changed to Streets Light (Other)”  Automatically change the *Service Request Type* = ‘Street Light Outage’. | | 8 | Workflow Rule for *Problem Type* Not Other | If the problem is anything listed other than Other, then it should be reported as a Street Light Outage case. | Evaluate the rule when a record is created, and every time it’s edited. | *Problem Type* is NOT null and is NOT ‘Other’ or ‘Request for New Lighting” | Display Message: “Service Request has been changed to Traffic Other”  Automatically set the *Service Request Type* = ‘Street Light Outage’. | | 9 | Workflow Rule for *Hazardous* |  | Evaluate the rule when a record is created, and every time it’s edited. | If *Problem Type* = Bulb Hanging OR Pole Down OR Wire Down OR Wires Sparking | Then *Hazardous* = ‘Yes”. Else, *Hazardous* = ‘No’. | | 10 | Workflow Rule for *Municipal Radio* | If the street light problem presents a hazard, then the system automatically emails the municipal radio station. | Evaluate the rule when a record is created, and every time it’s edited. | *Hazardous* = ‘Yes’ | Generate email to Municipal Radio.  **Also add Mike Faulkner and Rich Montanez to email distribution list.** | | 11 | 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. A new case will be created referencing the previous case. 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. | |
| **Escalation Rule** | TBD |
| **Agent Instructions** | * **Purpose**: To report a broken or burned-out street light.   + A street is generally intended for vehicular traffic, and has a name and designation (such as “Stenton Avenue”, “South Street”, or even “Elfreth’s Alley”. Anything that has a street name is a street. A light in a street is a street light.   + Types of street lighting repairs could be defective lights; knock downed poles, defective luminaries, and or damaged or defective fixtures. This category (Street Light Outage) is for lights that illuminate the roadways ONLY.   + An alley or alleyway is a narrow, pedestrian lane found in urban areas which usually runs between or behind buildings. In older urban development, alleys were built to allow for deliveries such as coal to the rear of houses. Alleys may be paved, or simply dirt tracks. A light in an alley is an alley light.   + Streets will take all Parks service requests for light outage and determine the responsible department. * **Contacts** fields: Enter the customer’s contact information. * **Service Address** fields: Enter the address of the street light that is broken or burned-out. Verify the address and which corner the light is on (i.e., southeast corner) before sending. Try to obtain exact locations from customers (1234 North Broad St., not 1200 block of North Broad St). * **Description** field: Enter additional location information of the street light. For example, you could enter "S BROAD ST & SNYDER AVE" into the case’s Service Address field, and you would enter the descriptive information, "four light poles northeast on Broad St near S BROAD ST & SNYDER AVE," into the Description field. * **Advise the customer**:   For Emergency Outages:   * + Initial complaints are investigated by a City contractor and repaired (if possible) or referred to either City crews or PECO.   + Depending upon the nature of the repair/outage, repairs are typically resolved within 10 business days.   + Replacement of FRANKLIN lights will take longer than the typical 10 day SLA as these lights must be added to the budget an ordered. Please advise callers that these types of lights will take longer and there is no specified timeframe.   + Submit a Street Light (Other) case to report a non-emergency request (lighting installation request, brighter bulbs, request more lighting, or studies, request for new lighting, etc.). Also use this case if, after the normal course of repairs, it has been deemed necessary to bring in another agency to resolve the problem.   For Other Issues:   * + **If its request for New Lighting:** There has to be empty wood pole that a light can be attached to it. If it’s an area serviced by underground electrician, it will be investigated if it is feasible   + If, after the normal course of repairs, it has been deemed necessary to bring in another agency to resolve the problem. Street Lighting division of The Streets Department is responsible for monitoring |
| **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** | GIS Layers  - Parks and Recreation  - Street Light (Layer)  - BRT  - Photography  **Assets**  **Street Lights**  **Park Lights** |
| **Other Information** | 1. Streets will take responsible for assigning to the department (Parks and Recreation department) 2. There should be GIS layer to recognize the Parks layer. |
| **Actions** | 1. Create a Public Property service request type – Action on UGSI?? 2. For requests related to Parks and other departments, Street department will take care of routing the request to concerned team. For this, add a field name in CityWorks to flag this routing – Action on City **…..??????-Marion ???** 3. City Works need to maintain the case so that Streets department to re-direct to Parks and Recreation. |

# Approvals after Requirements Definition Workshop

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