# Version History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/22/2014 | Initial Draft Before Workshop | J. Kelly |
| 1.1 | 01/29/2014 | Modified the Agent Script, validation rule and Support Process sections | Sreelatha SK |
| 1.2 | 01/30/2014 | Modified custom fields, rules, and agent instructions | J. Kelly |
| 1.3 | 02/09/2014 | Revised Agent Instructions section | J. Kelly |
| 1.4 | 02/12/2014 | Design-Related Change | J. Kelly |
| 1.5 | 02/14/2014 | Design Change to Process Overview Section | J. Kelly |
| 1.6 | 02/19/2014 | Removed Question Marks in Field Labels | J. Kelly |
| 1.7 | 02/25/2014 | Added Sections for GIS, Action Items | J. Kelly |
| 1.8 | 02/25/2014 | Changes incorporated after discussion with City | M. Schmidt  Sreelatha SK |
| 1.9 | 06/05/2014 | Added Redress Change | Sreelatha SK |
| 2.0 | 08/14/2014 | Changed Department to CLIP & removed integration to Cityworks. | J. Robb |

# 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

|  |  |
| --- | --- |
| **Department** | ~~Streets Department~~ Community Life Improvement Program (CLIP) |
| **Record Type Name** | Abandoned Bike |
| **Record Type Description** | Report the location of an abandoned bike |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Abandoned Bike* ***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 *Abandoned Bike* ***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, Tagged, and Closed | New | | Case Origin | Phone, Email, Web | Phone | | 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** | | Abandoned Bike | None | None | ~~CityWorks~~ 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** | | Abandoned Bike | Abandoned Bike | **<< ??? >>** | | 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** | | --- | --- | --- | --- | --- | --- | | Tagged With Yellow Alert Notice | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #1 and #2 | No | Is the bike tagged with a yellow alert notice? | | Unusable | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #2 | No | Is the bike in an unusable condition? | | Missing or Damaged Parts | Picklist  **Values:** Yes, No  **Default** | Yes | Workflow Rule #2 | No | Does the bike have missing or damaged parts? | | Time Locked in Same Location | Picklist  **Values:** Less than One Month, One Month or More, Not Locked  **Default:** | Yes | Workflow Rule #2 | No | Amount of time the bike has stayed in the same location | | Locked To | Picklist  **Values:** U-Rack, Meter-Rack, Sign Post, Other Post, Other  **Default:** | No | None | No | What is the bike attached to? | | Locked to Other | Text(100) | No | None | No | Describe what the bike is locked to | | Color | Picklist  **Values:** Red, Black, White, Blue, Green, Yellow, Silver/ Grey, Other  **Default:** | No | None | No | Color of the bike | | First Noticed | Date | No | None | No | Approximate date the bike was first noticed |   **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 *Tagged With Yellow Alert Notice* | If a bike is already tagged with a yellow alert notice, the abandoned bike has already been scheduled for removal. | Evaluate the rule when a record is created, and every time it’s edited. | *Tagged With Yellow Alert Notice* = ‘Yes’ | 1) Display message: “If a bike is already tagged with a yellow alert notice, the abandoned bike has already been scheduled for removal.”  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 Compliance Questions | A Service Request is created only If the abandoned bike meets the compliance criteria. | Evaluate the rule when a record is created, and every time it’s edited. | *Tagged With Yellow Alert Notice* = ‘No’ AND *Missing or Damaged Parts* is NOT null AND *Unusable* Is NOT null AND *Time Locked in Same Location* is NOT null | If *Tagged With Yellow Alert Notice* = ‘No’ AND *Missing or Damaged Parts* = ‘Yes’ AND *Unusable* = ‘Yes’ AND *Time Locked in Same Location* = ‘More than One Month’:  1) Set *Service Request Type* to “Abandoned Bike”.  Otherwise:  1) Display message: “Abandoned bicycles are those with missing or damaged parts AND in an un-usable condition AND locked in the same location for one month or more.”  2) Automatically change 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~~ *~~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 the removal of bicycles that have been abandoned on public property. * Abandoned bicycles (also known as dead bikes) are those with missing or damaged parts **AND i**n an un-usable condition **AND** locked in the same location for one month or more. * Contact fields: Enter the customer’s contact information. * Service Address fields: Enter the address of the abandoned bike. * Description field: Identify the bike’s missing parts (wheel, chain, seat); broken parts (bent wheel, broken seat); and other identifiable parts (radio taped to handlebars, white basket in front). * Advise the customer:   + Many bicycle owners park their bicycles in the same location every day therefore repeated or continued appearance of a bicycle in one location is not sufficient evidence of abandonment.     - Abandoned bicycles will be removed 1 - 2 times per year (mid to late Spring &/or mid-Fall) over a 10 day period.     - MOTU staff will mark abandoned bicycles a Week and AFTER a week later, Streets department will remove the bike.   + Reports of abandoned bikes may be made at any time.   + Public notice will be posted through the Mayor’s Office of Transportation and Utilities (MOTU) website <http://phillymotu.wordpress.com/>.   + City is not responsible for reimbursing owners whose abandoned bicycles have been removed.     - All bicycles scheduled for removal from racks, posts or other structures will be tagged with an alert notice to the owner at least one week prior to the removal date. The tags are bright yellow in color and contain the following information: Side 1: Abandoned Bicycle Removal Notice along with the City seal; Side 2: Abandoned Bicycle Removal Notice— This bicycle has been identified as abandoned and will be removed.   + All removed bicycles will be donated to local charities for refurbishment.   + For any questions, call the Mayor’s Office of Transportation and Utilities at 215-686-9000.   + Constituent can take a picture of the bike and attach to case. |
| **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** | Tagged - Owner Removed, Tagged - City Removed, New, In-Progress, Escalated, On Hold, Redress, and Closed |
| **ESRI/GIS Information** | **Layer**  PCPC Neighborhood 2035 Planning District |
| **Other Information** | Track number of requests and generate email when a certain level is reached (140)  Generate map with outstanding cases to allow route planning for seasonal campaigns |
| **Actions** |  |

# Approvals after Requirements Definition Workshop

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