# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/22/2014 | Initial Draft Before Workshop | J. Kelly |
| 1.1 | 01/28/2014 | Updates after Street Light Outage Workshop | J. Kelly, Sreelatha SK |
| 1.2 | 02/09/2014 | Agent Instruction Updates | J. Kelly |
| 1.3 | 02/12/2014 | Minor Format Changes and Design-Related Changes | J. Kelly |
| 1.4 | 02/14/2014 | Design Change to Process Overview Section | J. Kelly |
| 1.5 | 02/19/2014 | Removed Question Marks in Field Labels | J. Kelly |
| 1.6 | 02/25/2014 | Added Sections for GIS, Action Items | J. Kelly |
| 1.7 | 02/28/2014 | Changes incorporated after discussion with City | M. Schmidt  Sreelatha SK |
| 1.8 | 04/16/2014 | Added Streets Department responses to Action Items #1 and 2. | J. Kelly |
| 1.9 | 06/05/2014 | Added Redress Change | Sreelatha SK |
| 1.10 | 06/16/2014 | Added changes based on UGSI questions | M. Schmidt |
| 1.11 | 08/14/2014 | Updated based on follow-up session | 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** | Alley Light Outage |
| **Record Type Description** | Report a broken or burned out alley light |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Alley 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 *Alley 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 | 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** | | Alley Light Outage | 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** | | Alley Light Outage | St Lighting Shop | 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** | | Light Type | Picklist  **Values:** Alley Light, Street Light  **Default:** | Yes | Workflow Rule #1 | No | An **Alley** or **Alleyway** is a narrow, pedestrian lane which usually runs between or behind buildings. A **Street** is generally intended for vehicular traffic, and has a name and designation. | | Alley Passable | Picklist  **Values:** Yes, No  **Default:** | Yes |  | No | Is the alley free of trash and debris, etc.? | | How can access be obtained | Dependent Picklist  Values: Open, Key, No access  (Controlling field = *Alley Gated or Locked*) | Yes |  |  | Is a key available for entry into the designated area? | | Key location or passcode | Dependent Text (100)  (Controlling field = *Alley Gated or Locked*)  Display if *How can access be obtained* = ‘Key’ | Yes |  |  | Where can the key be found? | | Alley Type | Picklist  **Values:** Pre-Existing Alley, New Alley, New Driveway  **Default:** | No | Workflow Rule #2 | No | Is the request for a preexisting alley light or for new alley/driveway light? | | Problem Type | Picklist  **Values:** Bulb Hanging, Pole Down, Wire Down, Wire Sparking, Light Out, Light On/Off, On 24 Hours, Other Problem  **Default:** | Yes | Workflow Rule #3 | No | The type of problem that is causing the alley light outage. | | Hazardous | Formula  (Controlling field = Problem Type)  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Auto-filled |   **Validation Rules**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** | **Comments** | | 1 | Validation rule for *Address* | An Alley Light must have a valid address. | Alley light address must be a valid street address | GIS mapping can be used to identify asset. |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *Light Type* Street Light | If the Light Type is Street Light (emergency), the request is not Alley Light Outage but Street Light Outage case record type. | Evaluate the rule when a record is created, and every time it’s edited. | *Light Type* = ‘Street Light (emergency)’ | Display Message: “Service Request has been changed to Street Light Outage”  Automatically change the *Case Record Type* = ‘Street Light Outage’. | | 2 | Workflow Rule for  *Alley Type* | No requests are taken for new alleys or driveways lights. | Evaluate the rule when a record is created, and every time it’s edited. | *Alley Type* = ‘New Alley’ OR ‘New Driveway’ | Display message: “No requests are taken for new alleys or driveways lights.”  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”. | | 3 | Workflow Rule for *Hazardous* | Certain *Problem Types* are 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 ‘Wire Sparking’ | *Hazardous* = ‘Yes’. (Send an email to Municipal Radio.) | | 4 | 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 alley light.   + An **Alley** or **Alleyway** is a narrow, pedestrian lane found in urban areas which usually runs between or behind buildings. Alleys may be paved, or simply dirt tracks. A light in an alley is an alley light.   + A **Street** is generally intended for vehicular traffic, and has a name and designation. Anything that has a street name is a street. A light in a street is a streetlight. Submit a Street Light Outage request for emergencies or a Street Light (Other) request for non-emergencies. * **Contact** fields: Enter the customer’s contact information. * **Service Address** fields: Enter the exact address where the alley light is located. (Please try to get an exact location from the customer, i.e., 1234 North Broad St. rear alley, not a hundred block or intersection)*.* * **Description** field: Enter any additional information about the alley light. * Advise the customer:   + If access is given, the Streets Department will replace bulbs in alley lights, repair damage wiring and remove knocked down poles. Please be sure to have gates unlocked and a clear path to the light fixture. Streets Lighting Technicians are not authorized to pass through a resident’s home to gain access to the alley.   + The time frame for completion cannot be estimated at this time**.** Do **NOT** advise customers this is due to funding, backlog or requests or ANY other reason. Do **NOT** transfer to Streets Department to get a time frame. |
| **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:   * Alleys * Street Light   Assets:   * Alley Lights * Street Lights |
| **Other Information** |  |
| **Actions** | 1. Review Comment from Clinton Johnson in a 02/18/14 email -- Is there a classification for street segments that identify a street as an alley? Ask Marion Storey. *Per Tammi Geiger on 04/16/14: No street segments in alleys. The alley light poles will serve as indicators of alley lights.* |

# Approvals after Requirements Definition Workshop

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