# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/22/2014 | Initial Draft Before Workshop | J. Kelly |
| 1.1 | 01/29/2014 | Change in description, Support process, Additional fields and Agents instruction section | Sreelatha SK |
| 1.2 | 02/10/2014 | Revised Agent Instructions section, Property Loss Claim field and rule. | J. Kelly |
| 1.3 | 02/12/2014 | Design-Related Changes | J. Kelly |
| 1.4 | 02/14/2014 | Design Change to Process Overview Section | J. Kelly |
| 1.5 | 02/19/2014 | Design-Related Changes and Removed Question Marks in Field Labels | J. Kelly |
| 1.6 | 02/25/2014 | Added Sections for GIS, Action Items | J. Kelly |
| 1.7 | 03/11/2014 | Changes based on department workshop | M. Schmidt |
| 1.8 | 06/05/2014 | Added Redress Change | Sreelatha SK |
| 1.9 | 06/16/2014 | Responded to question from UGSI | M. Schmidt |
| 1.10 | 08/14/2014 | Updated based on follow-up session | M. Schmidt |
| 1.11 | 09/01/2014 | Updated *Type of Feedback* = ‘Complaint’ | Sreelatha SK |

# 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** | Complaint (Streets) |
| **Record Type Description** | To give the Streets Department feedback – either a compliment or a complaint. |
| **Process Overview** | 1. Constituent requests the service 2. The Agent creates a case by selecting the *Complaint (Streets)* ***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 *Complaint (Streets)* ***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 | 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** | | Complaint (Streets) | Refer to SLA Document | | 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** | | Complaint (Streets) | Streets - Other |  | | 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** | | Previous Case | Picklist  Values: Yes, No  Default: | Yes | Workflow Rule #1 | No | Does this relate to a previously submitted case? | | Previous Case found | Dependent Picklist  (If *Previous Case* = ‘Yes’)  **Values**: Yes, No  **Default**: No | Yes | Workflow Rule #2 | No | Can the previous Case be found? | | Type of Feedback (Comments) | Picklist  Values: Compliment, Complaint  Default: | Yes |  | No | What type of feedback is the customer providing? (Compliment/Complaint) | | Rubbish Issue | Dependent Picklist  (If *Type of Feedback* = ~~‘Yes’~~ ‘Complaint’)  **Values**: No, Missed, Noise, Other  **Default**: | Yes | Workflow Rule #3  Workflow Rule #4  Workflow Rule #5 |  | Does the complaint involve a missed pickup, private dumpsters, sanitation vehicle noise, or another complaint dealing with sanitation? | | Property Loss Claim | Dependent Picklist  (If *Type of Feedback* = = ~~‘Yes’~~ ‘Complaint’))  **Values:** Yes, No  **Default:** | No | Workflow Rule #6 | No | Is this contact about a property loss claim? |   **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 *Previous Case* | If the issue relates to a previous case that case should be referenced | Evaluate the rule when a record is created, and every time it’s edited. | *Previous Case* = ‘Yes’ | Display Message: “Try to locate previous case based on Case Number, Contact Name, or Service Request Location amend the previous case. If the case has been closed but not resolved, change status to *Redress*” | | 2 | Workflow Rule for *Previous Case found* | If the previous Case is found the current Case should be closed | Evaluate the rule when a record is created, and every time it’s edited. | *Previous Case found* = ‘Yes’ | Display Message: “Proceed with previous case. This case will be closed.”  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 *Rubbish Issue* = ‘Noise’ | If this is a Noise Complaint the caller should be referred to the Health Department | Evaluate the rule when a record is created, and every time it’s edited. | *Rubbish Issue* = ‘Noise’ | Display Message: “Advise constituent to contact the Health Department at 215-685-7580.”  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 for *Rubbish Issue* = ‘Missed’ | If this complaint involves a missed rubbish pickup, it should be referred to the Missed Pickup Service Request | Evaluate the rule when a record is created, and every time it’s edited. | *Rubbish Issue* = ‘Missed’ | Display message: “The system has changed the Case Record Type to Rubbish Collection.”  Automatically change the *Case Record Type* = ‘Rubbish Collection’ | | 5 | Workflow Rule for *Rubbish Issue* = ‘Other’ | If this complaint involves a rubbish issue other than a missed pickup, it should be referred to the Streets - Other Service Request. | Evaluate the rule when a record is created, and every time it’s edited. | *Rubbish Issue* = ‘Other’ | Display message: “The system has changed the Case Record Type to Streets - Other.”  Automatically change the *Case Record Type* = ‘Streets - Other’ | | 6 | Workflow Rule for *Property Loss Claim* | For a property loss claim, the caller should be referred tothe Claims Unit in the Office of Risk Management | Evaluate the rule when a record is created, and every time it’s edited. | *Property Loss Claim* = ‘Yes’ | Display Message: “For a property loss claim, contact the Claims Unit in the Office of Risk Management (215) 683-1700--**NOT** the Law Department.”  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”. | | 7 | 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 give the Streets Department feedback – either a compliment or a complaint. * **Contact fields**: Enter the customer’s name and contact information. * **Service Address fields**: Enter the address related to the compliment or complaint. Stress that these fields are required for the Streets Department to contact the caller. * **Description field**: Describe the complaint or compliment for the Streets Department. * **Advise the customer**:   + This information will be forwarded to the Streets department for review.   + If the Customer has left their Contact information, the Streets Department may contact them for further follow-up. |
| **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** |  |
| **Other Information** |  |
| **Actions** |  |

# Approvals after Requirements Definition Workshop

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