# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/22/2014 | Initial Draft Before Workshop | J. Kelly, Sreelatha SK |
| 1.1 | 02/09/2014 | Revised Agent Instructions section | J. Kelly |
| 1.2 | 02/12/2014 | Design-Related Changes | J. Kelly |
| 1.3 | 02/14/2014 | Design Change to Process Overview Section | J. Kelly |
| 1.4 | 02/19/2014 | Removed Question Marks in Field Labels | J. Kelly |
| 1.5 | 02/25/2014 | Changes incorporated after discussion with City | M. Schmidt  Sreelatha SK |
| 1.6 | 04/16/2014 | Added Street Department response to Action Item #1. | J. Kelly |
| 1.7 | 06/05/2014 | Added Redress Change | Sreelatha SK |
| 1.8 | 06/16/2014 | Updated based on UGSI questions | M. Schmidt |
| 1.9 | 07/04/2014 | Modified Workflow Rule for *Intersection Ramp for Crossing Street* | Sreelatha SK |
| 1.10 | 07/11/2014 | Added ADA Curb  Ramp to the Service Request list | Sreelatha SK |
| 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** | Dangerous Sidewalk |
| **Record Type Description** | Report a broken or hazardous sidewalk condition (violation to be issued) |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Dangerous Sidewalk* ***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 *Dangerous Sidewalk* ***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 | 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** | | Dangerous Sidewalk | Refer to SLA Document | | CityWorks | | ADA Curb Ramp | Refer to SLA Document | | N/A | | Service Not Needed | None | None | 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** | | Dangerous Sidewalk | Inspector | Stephen Lorenz | | ADA Curb Ramp | ADA Unit | Nancy Sen | | If Both - Dangerous Sidewalk & ADA Curb Ramp | Inspector | Stephen Lorenz | | Service Not Needed | 311 Call 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** | | --- | --- | --- | --- | --- | --- | | Sidewalk Curb Problem | Picklist  **Values** = Broken Sidewalk, Raised Sidewalk, Missing Sidewalk, Wheelchair Ramp, Other  **Default:** | Yes | None | No | Is the problem with the sidewalk-curb, including a ramp leading to a building entrance? | | Intersection Ramp for Crossing Street | Picklist  **Values:** Yes, No, Both  **Default:** | Yes | Workflow #1 | No | **Does the issue involve a ramp at an intersection that wheelchairs can use to cross the street from the sidewalk? If the issue involves both the sidewalk and the ramp choose Both.** |   **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 *Intersection Ramp for Crossing Street* | If the issue involves an ADA Curb Ramp, it is an ADA Curb Ramp Service Request | Evaluate the rule when a record is created, and every time it’s edited. | *Intersection Ramp for Crossing Street* = ‘Yes’ | Display Message: “Service Request has been changed to ADA Curb Ramp”  Automatically change the *Service Request Type* = ‘ADA Curb Ramp’. | | 2 | 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 dangerous sidewalk. If the problem is a ramp that is used by wheelchairs to cross the street, the Service Request will be changed to an *ADA Service Request*. * **Contact fields: Enter the customer’s contact information.** * **Service Address fields: Enter the exact address of the sidewalk problem.** * **Description field: Enter** any additional information about the sidewalk problem or its location. * **Advise the customer:**    + **Although it is the primary responsibility of the homeowner, complaints for a dangerous sidewalk can be made to the Streets Department.**   + **An inspector will be sent to the address and the property owner will be given a 'Notice to Repair' within 5 business days. There is no fine or penalty issued.**   + If Both - Dangerous Sidewalk & ADA Curb Ramp, then Dangerous Sidewalk takes priority. |
| **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** | ESRI / GIS will plot the location for duplicate identification.  Check with layers for sidewalk and curb ramp assets. |
| **Other Information** |  |
| **Actions** | 1. Review Comment from Sheryl Johnson in a 02/19/14 email: I followed up to get clarification on the Service Requests related to ADA ramps. This is NOT a separate Service Request. Broken ADA ramps is one of the things that may be reported via dangerous sidewalk. *02/25/14 – Changes incorporated in the document. Per Tammi Geiger on 04/16/14 -- Correct, only ADA ramp issues that should be submitted via ‘Dangerous Sidewalks’ are damaged ramps.* |

# Approvals after Requirements Definition Workshop

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