# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/23/2014 | Initial Draft Before Workshop | J. Kelly |
| 1.1 | 02/10/2014 | 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 | J. Kelly |
| 1.4 | 02/19/2014 | Design-Related Changes | J. Kelly |
| 1.5 | 02/25/2014 | Added Sections for GIS, Action Items | J. Kelly |
| 1.6 | 03/20/2014 | Before Workshop, added GIS questions and workflow for dumpster on private property | J. Kelly |
| 1.7 | 04/01/2014 | Updates based on the requirements workshop | J. Kelly |
| 1.9 | 04/11/2014 | Updated with Tamalar Geiger’s, Kimberly Adams’, and Graham Quinn’s responses to Action Items #1 through 10. | J. Kelly |
| 1.10 | 04/16/2014 | Added Streets Department responses to Action Items #2, 3, and 4. | J. Kelly |

# 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** | Dumpster Violation |
| **Record Type Description** | To complain about a dumpster that violates the law. |
| **Process Overview** | 1. Constituent requests the service 2. The Agent creates a case by selecting the *Dumpster Violation* ***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 *Dumpster Violation* ***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.       1. 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, In-Progress, Escalated, On Hold, and Closed, Redress | 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** | | Dumpster Violation | 3 | Business Days | 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** | | Dumpster Violation | Dumpster Violation | CityWorks | | Service Not Needed | 311 Contact Center | None |   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** | | --- | --- | --- | --- | --- | --- | | Dumpster at Restaurant | Picklist  **Values:** Yes, No  **Default:**  This field will be automatically populated from GIS based on the service address. (See GIS section.) | Yes | Workflow Rule #1 | No | Is the dumpster violating regulations a restaurant dumpster? | | Dumpster on Private Property | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #2 | No | Is the dumpster on private property? | | Dumpster Overflowing | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Is the dumpster overflowing? | | Dumpster Open to Public | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #4 | No | Is the dumpster open to the public (rather than locked, locked behind a gate, etc.)? | | Right of Way Permit | Picklist  **Values:** Yes, No  **Default:**  This read-only field will be automatically populated from GIS based on the service address. (See GIS section.) **See resolutions to action items.** | Yes | None | No | Is there a Right of Way permit associated with the dumpster? | | Dumpster–Public Right of Way License | Picklist  **Values:** Yes, No  **Default:** | No | None | No | Is there a Dumpster–Public Right of Way License associated with the dumpster? | | Dumpster Type | Picklist  **Values:** Rubbish/Recycling, Construction  **Default:** | Yes | None | No | Is the dumpster used for rubbish/recycling or is it used for construction? | | Dumpster Blocking Traffic | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #5 | No | Is the dumpster blocking traffic? | | Dumpster Blocking Sidewalk | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | Is the dumpster blocking a sidewalk? | | Dumpster Leaking | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | Is the dumpster leaking? |   **Validation Rules**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** | **Comments** | | 1 |  |  |  |  |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *Restaurant Dumpster* | To report a restaurant dumpster violation, contact the Health Department - Office of Food Protection at 215-685-7495. | Evaluate the rule when a record is created, and every time it’s edited. | *Restaurant Dumpster* = ‘Yes’ | Display Message: “To report a restaurant dumpster violation, contact the Health Department - Office of Food Protection at 215-685-7495.”  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”. | | 2 | Workflow Rule for *Dumpster on Private Property* | To report a dumpster on private property, submit a Maintenance Residential or Commercial service request. | Evaluate the rule when a record is created, and every time it’s edited. | *Dumpster on Private Property* = ‘Yes’ | Display message: “The system has changed the *Case Record Type* to Maintenance Residential or Commercial.”    Automatically change the *Case Record Type* = ‘Maintenance Residential or Commercial’. | | 3 | Workflow Rule for *Dumpster Overflowing* | If the dumpster is on private property AND the dumpster is overflowing, then submit this as a Maintenance Residential and Commercial service request. | Evaluate the rule when a record is created, and every time it’s edited. | *Dumpster on Private Property* = ‘Yes’ AND *Dumpster Overflowing* = ‘Yes’ | Display message: “The system has changed the *Case Record Type* to Maintenance Residential or Commercial.”    Automatically change the *Case Record Type* = ‘Maintenance Residential or Commercial’. | | 4 | Workflow Rule for *Open to Public* | If the dumpster is not accessible to the public, the Streets Department cannot inspect the dumpster. A service request cannot be submitted. | Evaluate the rule when a record is created, and every time it’s edited. | *Open to Public* = ‘No’ | Display Message: “If the dumpster is not accessible to the public, the Streets Department cannot inspect the dumpster.”  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”. | | 5 | Workflow Rule for *Dumpster Blocking Traffic* | If the dumpster blocking traffic is a construction dumpster and there is a Right of Way permit and there is a Dumpster–Public Right of Way license, there is no dumpster violation. | Evaluate the rule when a record is created, and every time it’s edited. | If *Dumpster Type* = ‘Construction’ AND *Dumpster Blocking Traffic* = ‘Yes’ AND *Right of Way Permit* = ‘Yes’ AND *Dumpster–Public Right of Way License* = ‘Yes’ | Display Message: “If the dumpster blocking traffic is a construction dumpster and there is a Right of Way permit and there is a Dumpster–Public Right of Way license, inform the customer that there is no dumpster violation.”  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”. | |
| **Escalation Rule** | TBD |
| **Agent Instructions** | * Purpose: To complain about a dumpster that violates the law. * Contact fields: Enter the customer’s name and contact information. * Service Address fields: Enter the exact address of the dumpster. * Description field: Enter any additional information about the dumpster location or violation. * Advise the customer:   + The Streets Department inspects dumpsters in the public right of way only.   + The dumpster needs to be open to public access for the Streets Department to address a dumpster issue. It cannot be locked, behind a locked gate, etc.   + This task should be investigated and resolved by the Streets Department within 3 business days.   + Every dumpster user in the city requires approval to use and place a dumpster. |
| **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. |
| **Process Support Values** | New, In-Progress, Escalated, On Hold, and Closed, Redress |
| **ESRI/GIS Information** | * The standard GIS layers will be used. * Additional GIS features to be displayed are: * Dumpster – Construction Licenses? * Dumpster – Private Licenses? * Dumpster – Public Right of Way Licenses? * Food Establishment Retail Non-Permanent Licenses? * Food Establishment Retail Permanent Licenses? * Right of Way Permit (Medallion information from Hansen)? |
| **Other Information** | N/A |
| **Actions** | 1. Kimberly and Tammi – Verify the SLA – is it 3 days or 5 days? *Per Tamalar on 04/02/14: I am not aware of an official document showing a Dumpster Violation as a Request Type, which would show a "3" day SLA for Commissioner's signature. For the Streets Department, dumpster violations fall under Sanitation Violations which have a 5 day SLA. I spoke with the Deputy Commissioner and he confirms. If there is documentation, please provide. Per Kimberly on 04/09/14: Since Dumpster Violation will now fall under Sanitation Violation and is not a separate service request, the SLA would be 5 days according to our SLA Summary document.* 2. Graham – Can GIS be used to determine if a dumpster is at a restaurant (food establishment)? *Per Graham on 04/10/14: Forwarded to Streets GIS Andy Mehos. Per Streets Department notes on 04/16/14: Dumpster at Restaurant may be available from L&I via licenses issued, food licenses, or establishment name.* 3. Graham – Can GIS be used to determine if a dumpster is on private property? *Per Graham on 04/10/14: Forwarded to Streets GIS Andy Mehos. Per Streets Department notes on 04/16/14: Dumpster on Private Property may be available via L&I license system. If dumpster is in Public Right-Of-Way, Streets inspect and if approved, a public license is issued.* 4. Graham – Can GIS be used to determine if there is a Right of Way Permit at an address? *Per Graham on 04/10/14: Forwarded to Streets GIS Andy Mehos. Per Streets Department notes on 04/16/14: Right-Of-Way Permit permits are segment-based and are not issued by property.* 5. Graham – Can GIS be used to determine if there is a Dumpster – Public Right of Way License? *Per Graham on 04/10/14: Forwarded to Streets GIS Andy Mehos.* 6. Graham – Can GIS/Hansen be used to determine if there is a Right of Way Permit (Medallion)? *Per Graham on 04/10/14: Forwarded to Streets GIS Andy Mehos.* 7. Graham and Clinton – Are any other GIS features listed in the GIS section above useful? *Per Graham on 04/10/14: Forwarded to Streets GIS Andy Mehos.* 8. Streets Department and Kimberly – Is the workflow rule for Dumpster Blocking Traffic accurate? Note that this is dependent on the answers to the other action items. *Per Tamalar on 04/02/14: Yes, however, please change the word "Traffic" to "Street" as the permit is for Street Closure. Also, permit categories include Full or Partial Closures, so it is possible to violate this aspect of the permit. You would need this detail info included in the GIS layer.* 9. Streets Department and Kimberly – Does the workflow rule for Dumpster Blocking Traffic also apply to Dumpster Blocking Sidewalk? *Per Tamalar on 04/02/14: Yes. However, there is secondary question to ask for Sidewalk Dumpsters, "Is the Dumpster Blocking the Sidewalk enclosed with a fence?" If Yes, no violation. If no, create SR.* 10. *Per Graham Quinn on 04/03/14: After reviewing Tami’s email in detail and speaking with Kim it seems that this SR should be under the sanitation violation SR. Although there are a lot of additional questions in this requirement doc, in my opinion, we need to incorporate it into the beginning of the other SR. Given the fact that Streets considers them the same, we should just branch off the questions from the other SR and add a question to let us know if it is related to a dumpster.* |

# Approvals after Requirements Definition Workshop

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