# 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 | 03/26/2014 | Updated after client workshop | M. Schmidt |
| 1.7 | 04/16/2014 | Added Streets Department response to Action Item #2. | J. Kelly |
| 1.8 | 04/17.2014 | Added Streets Department response to Action Item #3. Removed last bulleted item from Agent Instructions. | J. Kelly |
| 1.9 | 06/04/2014 | Added Redress changes | Sreelatha SK |
| 1.10 | 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** | Line Striping |
| **Record Type Description** | To request pavement markings and/or street line striping to help direct traffic. |
| **Process Overview** | 1. Constituent requests the service 2. The Agent creates a case by selecting the *Line Striping* ***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 *Line Striping* ***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** | | Line Striping | 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** | | Line Striping | Traffic Engineer | 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** | | --- | --- | --- | --- | --- | --- | | Pavement Marking Type | Picklist  **Values:** Cross Walk, Arrow, Center Line, Lane Divider, Bike Lanes, Other  **Default:** | Yes | None | No | What types of lines are being requested? |   **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 *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 request pavement markings and/or street line striping to help direct traffic. * **Contact** fields: Enter the customer’s name and contact information. * **Service Address** fields: Enter exact address or intersection where the pavement markings and/or street line striping are requested. * **Description** fields: Enter any information about the pavement markings and/or street line striping being requested. * **Advise the customer**:   + The Streets Department Traffic Division is responsible for pavement markings which help to direct traffic safely and efficiently.   + The request will be submitted for investigation and an action will be determined.  There is no estimated time frame for completion.   + The Traffic Engineering Unit determines the type and location of all signs, signals, markings and devices for regulating and controlling vehicular and pedestrian traffic. |
| **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, Open, In-Progress, Closed |
| **ESRI/GIS Information** |  |
| **Other Information** |  |
| **Actions** | 1. Revisit response given to the constituent regarding waiting list / completion status. *Per Tamalar Geiger on 04/16/14: To remain same as in Novo until additional info provided by Streets.* 2. Streets to determine wording. *Per Tamalar Geiger on 04/17/14: To remain same as in Novo until additional info provided by Streets.* |

# Approvals after Requirements Definition Workshop

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