# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/24/2014 | Initial Draft Before Workshop | J. Kelly |
| 1.1 | 02/09/2014 | Revised Agent Instructions section | J. Kelly |
| 1.2 | 02/12/2014 | Design-Related Revision | J. Kelly |
| 1.3 | 02/21/2014 | Removed Question Marks from Field Labels | J. Kelly |
| 1.4 | 02/25/2014 | Changes incorporated after discussion with City | M. Schmidt  Sreelatha SK |
| 1.5 | 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** | Manhole Cover |
| **Record Type Description** | **To report a missing, broken or rattling utility / manhole cover.** |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Manhole Cover* ***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 *Manhole Cover* ***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** | | Manhole Cover Missing | Refer to SLA Document | | CityWorks | | Manhole Other Problem | 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** | | Manhole Cover Missing | Row Unit | Stephen Lorenz | | Manhole Other Problem | Row Unit | Stephen Lorenz | | 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** | | Position | Picklist  **Values:** Travel Lane, Parking Lane, Sidewalk, Intersection  **Default:** | Yes | None | No | Is the manhole cover on a sidewalk or which position? | | Manhole Cover Owner Known | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | Is the owner of the manhole cover known? | | Property Owner | DEPENDENT Picklist  (Controlling field = *Manhole Cover Owner Known*)  Values = PWD, PGW, PECO, VERIZON, SEPTA, Public Property, Not Known  All values are shown if *Manhole Cover Owner Known* = ‘Yes’ | Yes | Workflow Rule #1  Workflow Rule #2  Workflow Rule #3  Workflow Rule #4  Workflow Rule #5 | No | Common owners are Philadelphia Water Department (PWD), Philadelphia Gas Works (PGW), Verizon, PECO, SEPTA, and Public Property. | | Has Manhole Cover Owner Been Contacted | DEPENDENT Picklist  (Controlling field = *Manhole Cover Owner Known*)  Values = Yes, No  All values are shown if *Manhole Cover Owner Known* = ‘Yes’ | No | Validation Rule #1 | No | Has the customer already contacted the owner of the manhole cover? | | Problem Type | Picklist  **Values:** Missing Lid, Area Around the Manhole, Loose Manhole, Other Issue  **Default:** | Yes | Workflow Rule #6  Workflow Rule #7 | No | Description of the problem with the manhole cover. |   **Validation Rules**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** | **Comments** | | 1 | Validation Rule for *Has Manhole Cover Owner Been Contacted* | The *Has Manhole Cover Owner Been Contacted* field must be populated (not NULL) if *Manhole Cover Owner Known* = ‘Yes’ |  |  |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *Property Owner* | If the Property Owner known, the customer should contact the owner directly. | Evaluate the rule when a record is created, and every time it’s edited. | *Property Owner* = ‘PWD’ | Display message: “If the owner of the manhole cover is known, the customers is responsible for contacting the owner of the manhole cover directly and provide the contact details or transfer call to 215-685-6300.”  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 *Property Owner* | If the Property Owner known, the customer should contact the owner directly. | Evaluate the rule when a record is created, and every time it’s edited. | *Property Owner* = ‘PGW’ | Display message: “If the owner of the manhole cover is known, the customers is responsible for contacting the owner of the manhole cover directly and provide the contact details or transfer call to 215-235-1000.”  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 *Property Owner* | If the Property Owner known, the customer should contact the owner directly. | Evaluate the rule when a record is created, and every time it’s edited. | *Property Owner* = ‘PECO’ | Display message: “If the owner of the manhole cover is known, the customers is responsible for contacting the owner of the manhole cover directly and provide the contact details or transfer call to 800-494-4000.”  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 *Property Owner* | If the Property Owner known, the customer should contact the owner directly. | Evaluate the rule when a record is created, and every time it’s edited. | *Property Owner* = ‘SEPTA’ | Display message: “If the owner of the manhole cover is known, the customers is responsible for contacting the owner of the manhole cover directly and provide the contact details or transfer call to 215-580-7800.”  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 *Property Owner* | If the Property Owner known, the customer should contact the owner directly. | Evaluate the rule when a record is created, and every time it’s edited. | *Property Owner* = ‘VERIZON’ | Display message: “If the owner of the manhole cover is known, the customers is responsible for contacting the owner of the manhole cover directly and provide the contact details or transfer call to 800-837-4966.”  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”. | | 6 | Workflow Rule for *Problem Type* | If the Problem Type known, then route to ‘Manhole Cover Missing’ OR ‘Manhole Other Problem’ queue. | Evaluate the rule when a record is created, and every time it’s edited. | *Problem Type* = ‘Missing Lid’ | Automatically set *Service Request Type* = ‘Manhole Cover Missing’.  Send email to Municipal Radio | | s | Workflow Rule for *Problem Type* | If the Problem Type known, then route to ‘Manhole Cover Missing’ OR ‘Manhole Other Problem’ queue. | Evaluate the rule when a record is created, and every time it’s edited. | *Problem Type* = ‘Area Around the Manhole’ OR ‘Loose Manhole’ OR ‘Other Issue’ | Automatically set *Service Request Type* = ‘Manhole Other Problem’. | | 6 | 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 missing, broken or rattling utility / manhole cover.**    + Manhole covers are heavy metal plates used to gain access to utilities and keep unauthorized individuals out.  Common owners are Philadelphia Water Department (PWD), Philadelphia Gas Works (PGW), Verizon, PECO, SEPTA, and Public Property. * **Contact fields: Enter the customer’s contact information.** * **Service Address fields: Enter the exact address of the location of the manhole cover.** * **Description field: Enter any additional information about the problem. If** the customer does not know the exact address, enter a location in the Description field. Example: Manhole is in the middle of the block on the southbound side of Broad Street, in front of Walgreens * **Advise the customer:**   + **The Streets Department does not own or maintain manholes/utility covers, however the department investigates manhole/utility cover issues that are on the asphalt in the street. A service request must be submitted for all inquiries/complaints**   + **The Streets Department will investigate within 2 business days and follow up with the owner of the manhole/utility cover**   + **Do NOT transfer calls or give the Street Department’s telephone number** |
| **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. |
| **Other Information** |  |
| **Actions** |  |

# Approvals after Requirements Definition Workshop

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