# 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 the Agent Instructions section | J. Kelly |
| 1.2 | 02/12/2014 | Minor Format Changes | J. Kelly |
| 1.3 | 02/19/2014 | Removed Question Marks from Field Labels | J. Kelly |
| 1.4 | 02/25/2014 | Added Sections for GIS, Action Items | J. Kelly |
| 1.5 | 03/25/2014 | Updated after Client Workshop | M. Schmidt |
| 1.6 | 04/16/2014 | Added Streets Department responses to Action Items #1, 2, and 3. Based on the response to Action Item #2, revised the Required Amount of Sidewalk Space field, the associated workflow, and the associated agent instruction. | J. Kelly |
| 1.7 | 04/17/2014 | Revised the document based on further comments received from the Streets Department: (1) number of SLA business days, (2) queue set to CityWorks, (3) help text for “Required Amount of Sidewalk Space”, (4) field label and help text for “Café Tables and Chair Out Before7 PM”, and (5) workflow rule names and criteria for workflows #3 and 4. | J. Kelly |
| 1.8 | 05/29/2014 | Updated revised SLA, Support Process | Sreelatha SK |
| 1.9 | 06/16/2014 | Updated based on UGSI questions | M. Schmidt |
| 1.10 | 08/14/2014 | Updated based on follow-up session | M. Schmidt |
| 1.11 | 03/26/2015 | Updated as per support ticket 09088453 | 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** | Newsstand/Outdoor Café |
| **Record Type Description** | To complain about a news stand or outdoor cafe on the sidewalk. |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Newsstand/Outdoor Café* ***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 *Newsstand/Outdoor Café* ***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** | | Newsstand Outdoor Café | 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** | | Newsstand Outdoor Café | Street Inspections | 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** | | On a city sidewalk or street | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #1 | No | Is the newsstand or café on the City’s (i.e., not a mall or parking lot) public right of way? | | Required Amount of Sidewalk Space | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #2 | No | Is there clear space for two pedestrians to pass each other on the sidewalk? | | Café Tables and Chair Out Before 7pm | Picklist  **Values:** Yes, No  **Default:** | ~~Yes~~ | Workflow Rule #3, Workflow Rule #4 | No | Does the café have tables and chairs set up next to the curb before 7:00 pm? |   **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 *On a city sidewalk or street* | Streets Department's Right-Of-Way Unit investigates and regulates only newsstands and outdoor cafés that are on the City's Public Right Of Way. | Evaluate the rule when a record is created, and every time it’s edited. | *On a city sidewalk or street = ‘No’* | 1. Display Message = “Streets Department's Right-Of-Way Unit investigates and regulates only newsstands and outdoor cafés that are on the City's Public Right Of Way.”  2. Automatically change Service Request Type to “Service Not Needed’ and save the case.  3. Automatically assign the case and then close it with a Close Reason = “Service Not Needed”. | | 2 | Workflow Rule for *Required Amount of Sidewalk Space* | The City Code requires there to be a minimum of 5 ft. of clear sidewalk space in low-pedestrian activity areas and 6 ft. in high-pedestrian activity areas for sidewalks of 13 ft. across or less. | Evaluate the rule when a record is created, and every time it’s edited. | *Required Amount of Sidewalk Space = ‘Yes’* | 1. Display Message = “The City Code requires there to be a minimum of 5 ft. of clear sidewalk space in low-pedestrian activity areas and 6 ft. in high-pedestrian activity areas for sidewalks of 13 ft. across or less. If there is the required amount of clear sidewalk space, there is no violation.”  2. Automatically change Service Request Type to “Service Not Needed’ and save the case.  3. Automatically assign the case and then close it with a Close Reason = “Service Not Needed”. | | 3 | Workflow Rule for *Café Tables and Chair Out Before 7pm = No* | The café cannot have tables and chairs set up next to the curb until after 7 PM. | Evaluate the rule when a record is created, and every time it’s edited. | *Café Tables and Chair Out Before 7 PM = ‘No’* | 1. Display Message = “The café cannot have tables and chairs set up next to the curb until after 7 PM. If the tables and chairs are out after 7 PM, there is no violation.”  2. Automatically change Service Request Type to “Service Not Needed’ and save the case.  3. Automatically assign the case and then close it with a Close Reason = “Service Not Needed”. | | 4  Violation Here: Either by Not Enough Clearance ***and/or*** Out Before 7pm | Workflow Rule for *Café Tables and Chair Out Before 7pm* | The café cannot have tables and chairs set up next to the curb until after 7 PM. | Evaluate the rule when a record is created, and every time it’s edited. | *(On the City's Public Right Of Way = ‘Yes’* AND *Required Amount of Sidewalk Space = ‘No’)* OR (*On the City's Public Right Of Way = ‘Yes’* AND *Café Tables and Chair Out Before 7 PM = ‘ Yes’)* | Set the Service Request Type = “Newsstand Outdoor Café” | | 5 | 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 complain about a news stand or outdoor cafe on the sidewalk. * **Contact** fields: Enter the customer’s contact information. * **Service Address** fields: Enter the address of the newsstand or outdoor café. * **Description** field: Enter any additional information about the complaint. * Advise the customer:   + The Streets Department's Right-Of-Way Unit investigates and regulates newsstands and outdoor cafés that are on the City's Public Right Of Way.   + The City Code requires there to be a minimum of 5 ft. of clear sidewalk space in low-pedestrian activity areas and 6 ft. in high-pedestrian activity areas for sidewalks of 13 ft. across or less.   + The café cannot have tables and chairs set up next to the curb until after 7 PM.   + Inspection should be completed within 2 business days. |
| **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** | The GIS layers to be displayed for the service request Location are:  The GIS features to be displayed for a selected address are:   * Ordnance Required: (Y/N) * Licensed Establishment (Y/N) * Licensee Name |
| **Other Information** | If Streets determines there is a sidewalk café and it’s unlicensed, have Salesforce also trigger an L&I violation. |
| **Actions** | 1. Determine layer to display whether an ordinance is required. *From Tamalar Geiger on 04/16/14: TBD. (boundary map for cafes was created years ago, need to confirm if available and up-to-date).* 2. Check on ordnance change to 6 feet of clearance. *From Tamalar Geiger on 04/16/14: Streets Handbook, p.74 states 5’ in low-pedestrian activity areas and 6’ in high-pedestrian activity areas. Not aware of legislation in process to change this.* 3. Review Comment of Marion Storey in email dated 03/09/14: Redress says case will be reopened and new case will be created. We have asked that previous case will NOT be reopened; just a new case will be reopened, with reference to previous case. This would be true for all redress work flows. *From Tamalar Geiger on 04/16/14: Correct for all redress – we do not reopen tickets/cases.* |

# Approvals after Requirements Definition Workshop

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