# Version History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/24/2014 | 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 section | J. Kelly |
| 1.4 | 02/25/2014 | Added Sections for GIS, Action Items | J. Kelly |
| 1.5 | 03/11/2014 | Updates based on department workshop | M. Schmidt |
| 1.6 | 04/16/2014 | Added Streets Department responses to Action Item # 1. | J. Kelly |
| 1.7 | 04/25/2014 | Added Sheryl Johnson’s response to Action Item # 1. Updated the Agent Instructions. | J. Kelly |
| 1.8 | 06/04/2014 | Added Redress Change | 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 | 09/19/2014 | Updated Workflow-2 Rule criteria | 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

|  |  |
| --- | --- |
| **Department** | Streets Department |
| **Record Type Name** | Other (Streets) |
| **Record Type Description** | Streets Department issues that cannot be reported under the available type of inquiries |
| **Process Overview** | * Constituent requests the service * The Agent creates a case by selecting the *Other (Streets)* ***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 *Other (Streets)* ***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. * 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** | | Other (Streets) | Refer to SLA Document | | CityWorks |   **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** | | Other (Streets) | Streets - Other |  |   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** | | Problem Type | Picklist  **Values**: Basketball Court in ROW, Bridge Defect, Fire Debris, Highway, Sanitation, Feedback  **Default:** | Yes |  | Yes | What type of problem is being reported? | | Problem Type - Highways | Dependent Picklist  (*Problem Type* = ‘Highways’)  **Values**: Barrier Removal Request, Guide Rail, Ice at Fire Scene , Metal Plate Issue, Push-Up, Roadside Vegetation, ROW Inspection, Wear Out, Other Highways  **Default:** | Yes | Workflow Rule #1 |  | Select a type of Highway Defect (if issue not found return to problem type) | | Problem Type - Sanitation | Dependent Picklist  (*Problem Type* = ‘Sanitation’)  **Values:** Adopt A Baskets, Events Cleanup, Hazardous Waste, Leaf Collection, Mechanical Cleaning, Abandoned Oil Drums, Other Sanitation Request, PMBC Cleanup, Waste Baskets, Waste Basket - Recycling, Waste Basket – Rubbish, Street Cleaning,  **Default:** | Yes | Workflow Rule #2 |  | Select a type of Sanitation Defect (if issue not found return to problem type) |   **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 *Problem Type - Highways* | Redirect Highways issues to other Service Request | Evaluate the rule when a record is created, and every time it’s edited. | *Problem Type – Highways* = ‘Push-Up’ or ‘Wear Out’ | Display Message: “Service Request has been changed to Street Defect”  Automatically change the *Case Record Type* = ‘Street Defect’ | | 2 | Workflow Rule for *Problem Type - Sanitation* | Redirect Sanitation issues to other Service Request | Evaluate the rule when a record is created, and every time it’s edited. | *Problem Type – ~~Highways~~* *Sanitation* = ‘Leaf Collection’ | Display Message: “Service Request has been changed to Rubbish Collection”  Automatically change the *Case Record Type* = ‘Rubbish Collection’ | | 3 | 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 submit requests for Streets Department activities that do not fit into the other types of requests. * **Contact** fields: Enter the customer’s name and contact information. * **Service Address** fields: Enter the exact, legal address of the property. * **Description** field: Enter any additional information about the problem.   **Advise the Customer:**   * This request will be forwarded to the Streets Department for further investigation. Your reference number for this case is [GIVE NUMBER]. You may use this number to track the status online at our website or by calling our Call Center Monday through Friday from 8:00am-8:00pm. Would you like the website address? [IF YES, PROVIDE THE ADDRESS; http://www.phila.gov/311/index.html.] |
| **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** |  |
| **Other Information** |  |
| **Actions** | 1. Determine any wording that the agent should give the constituent to close the call. *From Tamalar Geiger on 04/16/14: Use current Novo wording for this category. 4/11/14 – Per Sheryl wording is as follows: This request will be forwarded to the Streets Department for further investigation. Your reference number for this case is [GIVE NUMBER]. You may use this number to track the status online at our website or by calling our Call Center Monday through Friday from 8:00am-8:00pm. Would you like the website address? [IF YES, PROVIDE THE ADDRESS; http://www.phila.gov/311/index.html.]* |

# Approvals after Requirements Definition Workshop

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