# 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 | Format Changes | J. Kelly |
| 1.3 | 02/14/2014 | Design Changes to Process Overview Section | J. Kelly |
| 1.4 | 02/20/2014 | Design Revisions | J. Kelly |
| 1.5 | 02/25/2014 | Changes incorporated after discussion with City | M. Schmidt  Sreelatha SK |
| 1.6 | 06/04/2014 | Added Redress Changes | Sreelatha SK |
| 1.7 | 08/14/2014 | Updated based on follow-up session | M. Schmidt |
| 1.8 | 09/09/10`4 | Changed name to Ice Response | M. Schmidt |
| 1.9 | 12/03/2014 | Changed agent instructions | 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** | Salting |
| **Record Type Description** | To request snow plowing and salting for a street. |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Salting* ***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 *Salting* ***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** | | Icy Road Surface | Refer to SLA Document | | CityWorks | | Snow Removal | 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** | | Icy Road Surface | Ice Response | Stephen Lorenz | | Snow Removal | Ice Response | Stephen Lorenz | | Service Not Needed | 311 Call 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** | | Problem Type | Picklist  **Values:** Icy Road Surface, Snow Removal  **Default:** | Yes | Workflow Rule #1  Workflow Rule #2 | No | What type of snow or ice problem exists? |   **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 *Icy Road Surface* | If the problem is Icy Road Surface the case becomes a Icy Road Surface Service Request | Evaluate the rule when a record is created, and every time it’s edited. | *Problem Type* = “Icy Road Surface” | Set *Service Request Type* = ‘Icy Road Surface’ | | 2 | Workflow Rule for *Snow Removal* | If the problem is Snow Removal the case becomes a Snow Removal Service Request | Evaluate the rule when a record is created, and every time it’s edited. | *Problem Type* = “Snow Removal” | Set *Service Request Type* = ‘Snow Removal’ | | 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. The same case will be reopened with a status of “Redress”. 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 | Set Case Status = ‘Redress’ | |
| **Escalation Rule** | TBD |
| **Agent Instructions** | * **Purpose**: To request snow plowing and salting for a street.   + **Unless directed to do so by a supervisor or designee**, an agent **CANNOT** submit cases for plowing, salting or other snow related issues. * **Contact** fields: Enter the customer’s contact information. * **Service Address** fields: Enter the address of the street to be plowed or salted. * **Description** field: Enter any additional information about the request snow plowing and salting. * Advise the customer:   + The Streets Department will take specific location requests **AFTER** an actual snow/ice event, **NOT DURING** the snow/ice event.   + Requests should be responded to within 24 hours of the end of the snow/ice event. * When Streets Department is NOT taking cases for salting or shoveling, advise the customer:   + Streets Department is not taking specific location requests for salting during the snow because they are already out addressing the roads.   + Streets Department cannot accept a report for residents who have not cleared the sidewalk because property owners have up to 6 hours after the end of the snow to clear.   + Streets Department will accept cases for salting and reports of residents who have not shoveled their sidewalks, 6 hours AFTER the snow-related event has ended. Please call 311 back then to report or report via the Mobile Application once the snow has ended.   To find out when a particular City street will be plowed/salted during winter weather: Enter the customer’s address at [http://citymaps.phila.gov/citymaps/cmAddressRequest.aspx?URL=cmServiceAreaRequest.aspx](http://citymaps.phila.gov/citymaps/cmAddressRequest.aspx?URL=cmServiceAreaRequest.aspx )then click "Find" then select "Snow Categories".  City response to winter weather:  <http://www.phila.gov/streets/snowcat.html>.  City area weather information:  <http://weather.noaa.gov/cgi-bin/iwszone?Sites=:paz071>.  Snow Cat is a system that identifies various categories of weather conditions and indicates what the City's response will be to each category. |
| **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 |
| **Service Request Location** | ESRI / GIS will plot the location for duplicate identification.  The **GIS Layer** that indicates:   * Primary Street * Secondary Street |
| **Other Information** |  |
| **Actions** | None |

# Approvals after Requirements Definition Workshop

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