# Version History

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| **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 | 02/20/2014 | Design-Related Changes | J. Kelly |
| 1.5 | 02/25/2014 | Added Sections for GIS, Action Items | J. Kelly |
| 1.6 | 04/01/2014 | Updates based on the requirements workshop | J. Kelly |
| 1.7 | 04/04/2014 | Added Snow/Ice at Park or Rec Center workflow based on 04/02/2014 email from Tamalar Geiger | J. Kelly |
| 1.8 | 04/07/2014 | Added responses from Tamalar Geiger and Kimberly Adams to Action Item #2. | J. Kelly |
| 1.9 | 06/04/2014 | Added Redress Changes | 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** | Shoveling |
| **Record Type Description** | Report a violation of the sidewalk snow/ice removal code |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Shoveling* ***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 *Shoveling* ***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, In-Progress, Escalated, On Hold, Closed, Redress | New | | Case Origin | Phone, Email, Web | Phone | | 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** | | Shoveling | 1 | Business Day | 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** | | Shoveling | Shoveling |  | | 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** | | Problem Type | Picklist  **Values:** Shoveling Sidewalk, Salting or Plowing a Street  **Default:** | Yes | Workflow Rule #1 | No | Specifies if the problem requires shoveling a sidewalk, or salting and/or plowing a street. | | Snow/Ice at Park or Rec Center | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #2 | No | Is the request to shovel snow or ice at a park or recreation center? |   **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 *Problem Type* | If the request is to have a street salted or plowed, the Salting service request should be submitted. | Evaluate the rule when a record is created, and every time it’s edited. | *Problem Type* = ‘Salting or Plowing a Street’ | Display message: “The system has changed the Case Record Type to Salting.”    Automatically change the *Case Record Type* = ‘Salting’. | | 2 | Workflow Rule for *Snow/Ice at Park or Rec Center* | If the request is to clear snow or ice at a park or recreation center, submit a Park Conditions Safety and Maintenance service request. | Evaluate the rule when a record is created, and every time it’s edited. | *Snow/Ice at Park or Rec Center* = ‘Yes’ | Display message: “The system has changed the Case Record Type to Park Conditions Safety and Maintenance.”    Automatically change the *Case Record Type* = ‘Park Conditions Safety and Maintenance’. | | 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 report a neighbor who hasn't cleared their sidewalk after a snow/ice-related event.   + Use the salting service request to have a street salted or plowed by the Streets Department--when they are accepting that request. * Contact fields: Enter the customer’s name and contact information. * Service Address fields: Enter the exact address of the property whose owner has not cleared the sidewalk. * Description field: Enter any additional information about the shoveling request. * Advise the customer:   + Within six hours of the end of a snowfall or freezing rain, customers must clear a path at least 36 inches wide on their sidewalks.   + Customers should not shovel or sweep the snow into the street.   + The penalty for violating this regulation can range from a minimum fine of $50 up to $300 for each violation.   + Streets Department will investigate within 1 business day and may issue violations to owners who have not shoveled their sidewalks as required by the City Code. |
| **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, In-Progress, Escalated, On Hold, Closed, Redress |
| **ESRI/GIS Information** | N/A |
| **Other Information** | N/A |
| **Actions** | 1. Mike – Research how to disable this service request until an administrator enables this service request. If it is disabled, the agent could still be able to view the knowledgebase article. If disabled, this could be an information request. 2. Streets Department – Should we redirect shoveling requests for parks and recreation centers to the Parks and Recreation Department instead of the Streets Department? *Response from Tamalar Geiger on 04/02/2014 – Yes. From Tamalar Geiger on 04/07/2014 -- I believe 311 will communicate the SR with PPR's liaison. Parks and Rec (PPR) should receive their requests for shoveling directly from 311. With the new CRM having the Parks/Recs GIS layer, we expect this will not be an issue and the occurrence of misdirected SRs to Streets will be minimal. From Kimberly Adams on 04/07/2014 -- 311 would enter a service request for Park Safety & Maintenance if it was determined that the issue was at a park or rec center. Parks & Recreation have received these requests in the past so this wouldn’t be a new or revised request for them. I believe this came up because we do have callers asking that they be cited. Just needed to verify that Streets will not issue them a citation so the service request should only go to Parks & Recreation to actually clear the snow/ice from the sidewalk.* |

# Approvals after Requirements Definition Workshop

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