# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/26/2014 | 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 | 02/19/2014 | Design-Related Changes | J. Kelly |
| 1.5 | 02/25/2014 | Added Sections for GIS, Action Items | J. Kelly |
| 1.6 | 02/26/2014 | Changes incorporated after discussion with City | M. Schmidt  Sreelatha SK |
| 1.7 | 06/16/2014 | Updated based on UGSI questions | M. Schmidt |
| 1.8 | 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** | Stop Sign Repair |
| **Record Type Description** | To report a stop sign that is knocked down, missing, hanging, not visible, or is just a pole stump. |
| **Process Overview** | 1. Constituent requests the service 2. The Agent creates a case by selecting the *Stop Sign Repair* ***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 *Stop Sign Repair* ***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.       1. If Hazardous = ‘Yes’, send an email to Municipal Radio. |
| **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** | | Stop Sign Repair | 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** | | Stop Sign Repair | Traffic Engineer | Richard Montanez | | 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** | | Sign Type | Picklist  **Values:** Red and White, Street Name, One Way, Other  **Default:** | Yes | Workflow Rule #1 | No | Is the sign red and white with STOP on it, a sign with a street name on it, or a ONE WAY sign? | | Request for New Stop Sign | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #2 | No | Is the request for the placement of a new stop sign? | | Stop Sign Not Visible | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Is the stop sign not visible (blocked by tree branches or foliage)? | | Problem Type | Picklist  **Values:** Missing, Knocked Down, Damaged, Pole Remnants  **Default:** | Yes |  | No | Is the stop sign missing, knocked down, damaged, or are the remnants of the pole sticking up from the sidewalk? | | Hazardous | Picklist  **Values:** Yes, No  **Default:** | No | Validation Rule #1, Workflow Rule #4 | No | Auto-filled |   **Validation Rules**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** | **Comments** | | 1 | Validation Rule for *Hazardous* | If *Issue=* ‘Knocked Down’ or ‘Missing’ OR *Not Visible* = ‘Yes’ then *Hazardous* = ‘Yes’ |  | Read-only field automatically set based on validation rule |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *Sign Type* | If the sign has a street name or is a One Way sign, then use the Traffic (Other) service request. | Evaluate the rule when a record is created, and every time it’s edited. | *Sign Type* <> ‘Stop Sign’ | Display Message: “Service Request has been changed to Traffic Other”    Automatically change the *Case Record Type* = ‘Traffic (Other)’. | | 2 | Workflow Rule for *Request New Stop Sign* | If the request is for placement of a new stop sign, then use the Traffic (Other) service request. | Evaluate the rule when a record is created, and every time it’s edited. | *Request New Stop Sign* = ‘Yes’ | Display Message: “Service Request has been changed to Traffic Other”    Automatically change the *Case Record Type* = ‘Traffic (Other)’. | | 3 | Workflow Rule for *Not Visible* | If the problem is that the sign is blocked by tree branches/foliage, this is not the Streets Department's responsibility. This should be referred to the responsible agency. | Evaluate the rule when a record is created, and every time it’s edited. | *Not Visible* = ‘Yes’ | Display message: “Stop signs that are not visible are not the Street Department’s responsibility. Refer to constituent to the responsible agency.”  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 *Hazardous* | If the stop sign problem presents a hazard, then the system automatically emails the municipal radio station. | Evaluate the rule when a record is created, and every time it’s edited. | *Hazardous* = ‘Yes’ | Email generated to Municipal Radio  Automatically change Service Request Type to “Stop Sign Repair’ | | 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 report a stop sign that is knocked down, missing, hanging, not visible, or is just a pole stump.   + If the call is **NOT** regarding a STOP sign or a pole stump, then a “Traffic Other” service request must be entered for the sign problem * **Contact** fields: Enter the customer’s name and contact information. * **Service Address** fields: Enter the exact address of the stop sign. * **Description** field: Enter any additional information about the stop sign’s location or problem. * **Advise the customer**:   + The Traffic Division of The Streets Department installs and maintains traffic signage, used to control the flow of traffic.   + This sign is used to control the flow of traffic through intersections. This sign is affixed to a metal or wooden pole. This case used ONLY for STOP signs or pole stumps problems.   + An investigator from the Streets Department will visit the site within 24 hours to evaluate. Work should be completed within 4 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** | Layers   * Traffic   Assets:   * Signs * Signals |
| **Other Information** |  |
| **Actions** |  |

# Approvals after Requirements Definition Workshop

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