# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/28/2014 | Initial Draft Before Workshop | J. Kelly |
| 1.1 | 02/09/2014 | Revised Agent Instructions section | J. Kelly |
| 1.2 | 02/12/2014 | Minor Format Changes | J. Kelly |
| 1.3 | 02/14/2014 | Design Change to Process Overview Section | J. Kelly |
| 1.4 | 02/25/2014 | Changes incorporated after discussion with City | M. Schmidt  Sreelatha SK |
| 1.5 | 04/16/2014 | Added Street Department’s response to Action Item #1. | J. Kelly |

# 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** | Street Paving |
| **Record Type Description** | To request to get a street resurfaced/repaved. |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Street Paving* ***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 *Street Paving* ***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, and Closed | New | | Case Origin | Phone, Email, Web | Phone | | 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** | | Street Paving | None | None | 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** | | Street Paving | HwyDistrict | Stephen Lorenz | | 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** | | Resurfacing Defect? | Picklist  **Values:** Yes, No  **Default:** | Yes |  | No | Is there a defect in the resurfacing of a street? | | Resurfacing Request? | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #1 | No | Is this a request to resurface a street? |   **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 Resurfacing Request? | If this is not a request for resurfacing, then do not create a Service Request. | Evaluate the rule when a record is created, and every time it’s edited. | *Resurfacing Request?* = ‘No’ | Display message: “Determine if this is a request for another type of service.”    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”. | | 2 | 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 to get a street resurfaced/repaved. * **Contact fields**: Enter the customer’s name and phone information. * **Service Address fields**: Enter the address or hundred block where resurfacing is requested. * **Description field**: Describe resurfacing defect or the reason for the resurfacing request. * The Streets Department maintains a schedule for resurfacing the streets within the City. View the current repaving schedule at [**http://www.philadelphiastreets.com/transportation-highways-seasonal\_paving\_list.aspx**](http://www.philadelphiastreets.com/transportation-highways-seasonal_paving_list.aspx) * **Advise the customer**: * The resurfacing process begins with milling, which is the removal of the top layer of asphalt from the street. The time from milling to resurfacing will normally be within four weeks. This time can be lengthened due to bad weather. * The Streets Department also co-ordinates with utilities. If the utility has street work scheduled for the street being resurfaced, the resurfacing will be scheduled after the utility does their work in the street, so that the new street surface is not disturbed. * The Streets Department will accept requests for repaving and review on a case by case basis. If the blocks are already scheduled for the year, the request will not be fulfilled until the schedule date. |
| **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, Redress, and Closed |
| **Service Request Location** | ESRI / GIS will plot the location for duplicate identification. |
| **Other Information** | None |
| **Actions** | 1. The link provided in the Agent flow [**http://www.philadelphiastreets.com/transportation-highways-seasonal\_paving\_list.aspx**](http://www.philadelphiastreets.com/transportation-highways-seasonal_paving_list.aspx) is moved or not found. City has to verify and comeback. *From Tamalar Geiger on 04/16/14: TBD. The season begins mid-April. The paving list for 2014 will be posted shortly.* |

# Approvals after Requirements Definition Workshop

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