# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/28/2014 | 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 | 02/26/2014 | Changes incorporated after discussion with City | M. Schmidt  Sreelatha SK |
| 1.7 | 03/19/2014 | Removed Question Marks from Field Labels | J. Kelly |
| 1.8 | 06/16/2014 | Modified based on UGSI questions | M. Schmidt |
| 1.9 | 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** | Traffic (Other) |
| **Record Type Description** | To report other traffic-related problems that are not emergencies. |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Traffic (Other)* ***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 *Traffic (Other)* ***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 | 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** | | Traffic (Other) | 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** | | Traffic (Other) | Traffic |  | | 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** | | Emergency Signal | Picklist  **Values**: Yes, No  **Default:** | Yes | Workflow Rule #1 | No | Is this a signal light being used to control traffic, a signal used in a school zone, or a signal for pedestrian crossings? | | Stop Sign | Picklist  **Values**: Yes, No  **Default:** | Yes | Workflow Rule #2 | No | Is the sign red and white with STOP on it? | | Problem Type | Picklist  **Values:** All-Way Stop Request, Do Not Enter Sign Missing, One-Way Sign Missing, Parking Related Signs, Pick Up Sign, School Related Signs, Sign Pole Problem, Street Name Sign Request, Other Signs, Driveway X Box App, Street Permit, Traffic Inquiry  **Default:** | Yes | None | No | Description of the traffic problem. | | Sign Regulating Traffic | Dependent Picklist  (Controlling field = Problem Type)  **Values**: Yes, No  Field is enabled if *Problem Type* = ‘Other Signs’ | Yes | Workflow Rule #3 | No | Choose No if this is business or advertising related (including political) |   **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 *Emergency Signal* | Send Traffic Signal cases to the Traffic Signal Service Request | Evaluate the rule when a record is created, and every time it’s edited. | *Emergency Signal*  = ‘Yes’ | Display Message: “Service Request has been changed to Traffic Signal Emergency.”  Automatically change the *Case Record Type* = ‘Traffic Signal Emergency’ | | 2 | Workflow Rule for *Stop Sign* | Send Stop Sign cases to the Stop Sign Repair Service Request | Evaluate the rule when a record is created, and every time it’s edited. | *Stop Sign* = ‘Yes’ | Display Message: “Service Request has been changed to Stop Sign Repair.”  Automatically change the *Case Record Type* = ‘Stop Sign Repair’ | | 3 | Workflow Rule for Sign Regulating Traffic | If this is not a sign regulating traffic it is a zoning issue | Evaluate the rule when a record is created, and every time it’s edited. | *Sign Regulating Traffic = ‘No’* | Display Message: “Service Request has been changed to L&I Zoning Business.”    Automatically change the *Case Record Type* = ‘Zoning Business’ | | 4 | 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 other traffic-related problems that are not emergencies. * **Contact** fields: If you would like to be updated on the resolution of the issue contact info is needed. * **Service Address** fields: Enter the exact address of the problem. * **Description** field: Enter details about the traffic-related problem. * Request concerning lights: Ask the customer “Is this a light that illuminates the street, or a light that is directing traffic?” Some customers mistakenly refer to traffic lights as street lights. * Other Signals option: Includes tree branches blocking (obscuring) traffic signals. * Signal Request option: Includes a request for modifying the normal daily operation of a traffic signal. * Other Signs option: Includes “No Parking At Any Time” signs and “No Outlet” signs * Parking Related Signs option: * “No Truck Parking 6pm-6am” sign requires a letter from a resident of the street. Submit a letter from a resident of the street or the elected representative of that street to the Streets Dept. * “No Truck Parking Any Time” sign requires an Ordinance of Council if distance being cleared is over 250 feet. Requesting party should petition to the District Council person asking for this restriction to be established. The Council Office will contact Streets Department, if ordinance is approved. * “No Parking Any Time” sign requires an Ordinance of Council. Requesting party should petition to the District Council person asking for this restriction to be established. The Council Office will contact Streets Department, if ordinance is approved. * Changing “No Parking or No Stopping Any Time” requires an Ordinance of Council. Requesting party should petition to the District Council person asking for this restriction to be removed. The Council Office will contact Streets Department to see if the request is feasible, if feasible the ordinance process will continue. * “Limited Time Parking” sign requires an Ordinance of Council. Requesting party should petition to the District Council person asking for this restriction to be established. The Council Office will Contact Philadelphia Parking Authority if the ordinance is approved. * Changing direction of a Street or establishing a One-Way regulation requires an Ordinance of Council. The requesting party should petition to the District Council person asking for the change to be implemented. The Council Office will contact Streets Department to see if the request is feasible, if feasible the ordinance process will continue.   **Advise the customer**:   * Time frame for completion is dependent on problem type. Requests involving traffic studies may take weeks to complete. |
| **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 * Zoning   Assets:   * Signs * Signals * Other Traffic Markings |
| **Other Information** |  |
| **Actions** |  |

# Approvals after Requirements Definition Workshop

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