# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/28/2014 | Initial Draft Before Workshop | Sreelatha SK |
| 1.1 | 01/29/2014 | Peer review updates | J. Kelly |
| 1.2 | 02/09/2014 | Revised Agent Instructions section | J. Kelly |
| 1.3 | 02/12/2014 | Design-Related Change | J. Kelly |
| 1.4 | 02/14/2014 | Design Change to Process Overview Section | J. Kelly |
| 1.5 | 02/14/2014 | Design-Related Changes | J. Kelly |
| 1.6 | 02/25/2014 | Added Sections for GIS, Action Items | J. Kelly |
| 1.7 | 02/28/2014 | Changes incorporated after discussion with City | M. Schmidt  Sreelatha SK |
| 1.8 | 04/16/2014 | Added Streets Department response to Action #1. | J. Kelly |
| 1.9 | 06/05/2014 | Field name modification due to size issue | Sreelatha SK |
| 1.10 | 06/16/2014 | Updated based on UGSI questions | M. Schmidt |
| 1.10 | 07/07/2014 | Modified Workflow-6 | Sreelatha SK |
| 1.11 | 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 Signal Emergency |
| **Record Type Description** | Report that a traffic signal bulb is out or non-functional |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Traffic Signal Emergency* ***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 Signal Emergency* ***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.    5. 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** | | Traffic Signal Emergency | 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 Signal Emergency | Radio | Richard Montanez | | 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** | | Request for New Traffic Signal | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #1 | No | Is this a request to install a new traffic signal? | | Request to Modify Signal Operation | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #2 | No | Is this a request to modify the normal daily operation of a traffic signal | | Signal Type | Picklist  **Values:** Traffic Signal, School Flasher, Pedestrian Beacon, Other Signal  **Default:** | Yes | Workflow Rule #3 | No | A traffic signal is red, yellow and green light regulating traffic through an intersection. A school flasher is a yellow flashing signal light in a school zone. A pedestrian beacon is a flashing beacon that tells drivers pedestrians are crossing | | Direction | Dependent Multi-picklist  (Controlling field = Signal Type)  **Values**: North, South, East, West  Field is enabled if *Signal Type* = ‘Traffic Signal’ | No | None | No | What direction(s) are the traffic signal lights that are malfunctioning facing? If unsure, leave blank. | | Recurring Problem | Picklist  **Values:** Yes, No  **Default:** | No | None | No | Did the caller indicate a recurring problem? If the problem is recurring, make sure to get contact information so the Streets can contact to determine issue. | | Time of the Incident | Dependent Text  (Controlling field = *Did the caller indicate recurring problem)*  Field is enabled if *Did the caller indicate recurring problem* = ‘Yes’ | No | None | No | What time the incident occurred. | | Blocked by Tree Branches or Foliage | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #4 | No | Is the traffic signal blocked by tree branches/foliage? | | Problem Type | Picklist  **Values:** All Out, Blanks Out, Bulb Out, Flashing, Knocked Down, Leaning, Missing Base, Stuck, Turned  **Default:** | Yes | Workflow Rule #5 | No | The type of problem affecting the traffic signal. | | Signal Bulb Out | DEPENDENT Multi-Picklist  (Controlling field = Problem Type)  **Values** = Red, Yellow, Green  **Default**:  All values are shown if *Problem Type* = ‘Bulb Out’ | No | Validation Rule #2 | No | Which traffic signal bulb(s) are out? | | Emergency | **Value:** Yes | Yes | Workflow Rule #6 | No | Specifies that the problem presents a hazard. (Read-only field.) |   **Validation Rules**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** | **Comments** | | 1 | Validation rule for *Service Address* | The location must be a street intersection, not a street address. | Display message: “The location of the traffic signal must be a street intersection, not street address.” |  | | 2 | Validation Rule for *Signal* *Bulb Out* | The *Signal* *Bulb Out* field must be populated (not NULL) if *Problem Type* = ‘Bulb Out’ | Display message: “If signal’s bulb is out, then the color of the bulb must be identified.” |  |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *Request for New Traffic Signal* | To request new installation of a traffic signal, a written request must be sent to: Chief Traffic Engineer, Streets Department, Room 980, Municipal Services Building, 1401 J.F.K. Boulevard Philadelphia, PA 19102 | Evaluate the rule when a record is created, and every time it’s edited. | *Request for New Traffic Signal* = ‘Yes’. | Display Message: “To request new installation of a traffic signal, a written request must be sent to: Chief Traffic Engineer, Streets Department, Room 980, Municipal Services Building, 1401 J.F.K. Boulevard Philadelphia, PA 19102. The system has changed this request to Service Not Needed.”  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 *Request to Modify Traffic Signal Operation* | To submit a request to modify the normal daily operation of a traffic signal, use the Traffic (Other) case record type. | Evaluate the rule when a record is created, and every time it’s edited. | *Request to Modify Traffic Signal Operation* = ‘Yes’. | Display Message: “Service Request has been changed to Traffic Other”  Automatically change the *Service Request Type* = ‘Traffic (Other)’. | | 3 | Workflow Rule for *Signal Type* | If *Signal Type* is not an emergency type, the *Service Request Type* is set to ‘Traffic (Other) | Evaluate the rule when a record is created, and every time it’s edited. | *Signal Type* = ‘Signal Other’ | Display Message: “Service Request has been changed to Traffic Other”  Automatically change the *Service Request Type* = ‘Traffic (Other)’. | | 4 | Workflow Rule for *Blocked by Tree Branches or Foliage* | If the problem is that the signal is blocked by tree branches/foliage, this is not the Streets Department's responsibility. This should be referred to Parks and Recreation for street tree pruning. | Evaluate the rule when a record is created, and every time it’s edited. | *Blocked by Tree Branches or Foliage* = ‘Yes’. | Display Message: “Service Request has been changed to Traffic Other”  Automatically change the *Service Request Type* = Traffic (other) | | 5 | Workflow Rule for Problem Type | If the Signal Type <> ‘Traffic Signal’ and Problem Type <> ‘Knocked Down’, then this is referred as Signal (other) queue. | Evaluate the rule when a record is created, and every time it’s edited. | *Signal Type <>* ‘Traffic Signal’ AND *Problem Type* NOT = ‘Knocked Down’. | Display Message: “Service Request has been changed to Traffic Other”  Automatically change the *Service Request Type* = Traffic (other) | | 6 | Workflow Rule for Municipal Radio | Because a traffic signal, school flasher, or pedestrian beacon emergency is a hazard, the system automatically emails the municipal radio station. | Evaluate the rule when a record is created, and every time it’s edited. |  | Automatically set *Hazardous* = ‘Yes’.  Generate email to Municipal Radio. | | 7 | 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 missing, malfunctioning, defaced, damaged traffic signal and/or flashing signal. * **Attention: The traffic signal at 16th & Packer Avenue will be on flash until further notice. DO NOT submit a case for this location.** * **Contact** fields: Enter the customer’s contact information. * **Service Address** fields: Enter the exact intersection of the traffic signal. (Street **INTERSECTION**, not an address or hundred block. Be sure to verify the intersection before sending.) * **Description** field: Enter any additional information about the traffic signal and the corner of the intersection where the problem traffic signal is located. * 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. * **Advise the customer**:   For a Traffic Signal Emergency:   * + A Streets Department Investigator will visit site within 24 hours to evaluate and take appropriate action to make intersection safe.   + Work should be completed within 4 business days.   For Other Signal Requests:   * + Time frame for completion is dependent on problem type. Requests involving traffic studies may take weeks to complete.. * Did the caller indicate recurring problem is ‘YES’, verify if the existing cases. If the problem is fixed with any action like power cut, or upgrade, then need the caller information to get more information. |
| **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:   * Signals * Signs |
| **Other Information** |  |
| **Actions** | Will there be any asset to indicate scheduled outage in GIS. *From Tamalar Geiger on 04/16/14: Streets is not aware of any asset.* |

# Approvals after Requirements Definition Workshop

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