# Version History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/31/2014 | Initial Draft Before Workshop | Sreelatha SK |
| 1.1 | 02/10/2014 | Minor Edits | J. Kelly |
| 1.2 | 02/21/2014 | Design-Related Revisions | J. Kelly |
| 1.3 | 03/04/2014 | Minor Revisions Before Workshop | J. Kelly |
| 1.4 | 03/04/2014 | Revisions after Requirements Workshop | J. Kelly |
| 1.5 | 03/06/2014 | Revisions after Second Requirements Workshop | J. Kelly |
| 1.6 | 04/07/2014 | Added responses to Action Items #1 through #5. Updated the valid statuses. Revised this advice: “If the inlets are at a single intersection with multiple corners, enter one service request. If inlets are at different intersections, enter one service request for each intersection.” | J. Kelly |
| 1.7 | 06/04/2014 | Adding Redress changes | Sreelatha SK |
| 1.8 | 08/19/2014 | Modified Workflow Rules and Status | 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

|  |  |
| --- | --- |
| **Department** | Water Department |
| **Record Type Name** | Inlet Cleaning |
| **Record Type Description** | To record a request for Inlet (also known as storm drain or sewer drain) clogged with debris |
| **Process Overview** | 1. Constituent requests the service 2. The Agent creates a case by selecting the *Inlet Cleaning* ***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 *Inlet Cleaning* ***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).    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** | | Inlet Cleaning | 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** | | Inlet Cleaning | Inlet Cleaning | < ? > | | 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:  Note: Get information on **Name**, **Address**, and **Phone** number of the Customer for follow-up. These are standard fields, so not captured under additional information section.  **Additional Information section**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Field Label** | **Field Type** | **Required** | **Rule #** | **History** | **Field Help Text** | | Inlet or Manhole | Picklist  **Values:** Inlet, Manhole  **Default:** Inlet | Yes | Workflow Rule #1 | No | Is the report regarding an inlet or manhole? An inlet is on the curb. A manhole is in the middle of the right of way. | | Pothole, Cave-In, or Ditch | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #2 | No | Is the report regarding an inlet or manhole? | | Rear of Property | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Is the problem in the rear of a property? | | Hazardous Waste | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #4 | No | Reports of oil or fuel dumping into an inlet or manhole, pumping of any fluids (including water) to the street/inlet, or any activity that may impact the waterways, collection system, sewage treatment plant, or drinking water supply. | | Heavy Rain | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #5 | No | Is it raining heavily? | | Flooding | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #5 | No | Is it flooding at intersection? | | Obstructing Traffic | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #5 | No | Is it obstructing traffic? | | Bad Odor | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #5 | No | Is there a bad odor coming from the inlet? | | Cover Missing or Broken | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #5 | No | Is the cover missing or broken? | | Water in Basement or Cellar | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #5 | No | Is it causing water in the basement or the cellar? | | Illegal Dumping | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #5 | No | Is someone illegally dumping into a City inlet or sewer? | | Intersection or Mid-Block | Picklist  **Values:** Intersection, Mid-Block  **Default:**  Autopopulated based on service address and GIS information. | Yes | None | No | Intersection or mid-block? | | Inlet Location | Text(255)  Autopopulated based on service address and GIS information. | Yes | None | No | Based on the GIS information, what is the location of the inlet(s) to be cleaned? |   **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 *Inlet or Manhole* | If the problem is with a manhole rather than an inlet, submit a Manhole Cover case. | Evaluate the rule when a record is created, and every time it’s edited. | *Inlet or Manhole* = ‘Manhole” | Display message: “The system has changed the Case Record Type to Manhole Cover.”  Automatically change the *Case Record Type* = ‘Manhole Cover’. | | 2 | Workflow Rule for *Pothole, Cave-In, or Ditch* | If the problem is with a pothole, cave-in, or ditch rather than an inlet, submit a Pothole Repair case. | Evaluate the rule when a record is created, and every time it’s edited. | *Pothole, Cave-In, or Ditch* =’Yes’ | Display message: “The system has changed the Case Record Type to Street Defect ~~Pothole Repair~~.”  Automatically change the *Case Record Type* = ‘Street Defect’. | | 3 | Workflow Rule for *Rear of Property* | If the problem is in the rear of a property, submit a Maintenance Residential or Commercial case. | Evaluate the rule when a record is created, and every time it’s edited. | *Rear of Property* = ‘Yes’ | Display message: “The system has changed the Case Record Type to Maintenance Residential or Commercial.”  Automatically change the *Case Record Type* = ‘Maintenance Residential or Commercial’. | | 4 | Workflow Rule *Hazardous Waste* | If the problem presents a hazard, then the system automatically emails the municipal radio station.  The request should be directed to Municipal Radio with complete report. | Evaluate the rule when a record is created, and every time it’s edited. | *Hazardous Waste* = ‘Yes’ | Send email to Municipal Radio for investigation by the Industrial Waste Unit. The report should include: (1) name and telephone number of the complainant, (2) street address of the incident, (3) time the incident was witnessed, and (4) Case Number | | 5 | Workflow Rule for Compliance Questions | If the constituent meet the compliance criteria, a Service Request is transferred to PWD Customer Service.  Compliance criteria:  *Heavy Rain* OR *Flooding* OR *Obstructing Traffic O*R *Bad Odor* OR *Cover Missing or Broken* OR *Water in Cellar* OR *Illegal Dumping* = ‘Yes’ | Evaluate the rule when a record is created, and every time it’s edited. | <Compliance criteria factor> = ‘Yes’ | Transfer the customer to PWD Customer Service at (215) 685-6300.  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”.  Information request = ‘Yes”. Close this case. | | 6 | Workflow Rule for *Redress* | If the Water 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 | Case is treated as a redress. | |
| **Escalation Rule** | None |
| **Agent Instructions** | Purpose: To request cleaning for a clogged inlet (sewer) or storm drain cleaning.  Contact fields: Enter the customer’s name, address and contact information.  \* Advise the customer that this information is requested in the event the department needs to obtain more information to follow up on this request. If the customer wants to remain anonymous, ask the customer, “Are you sure you want to submit this request anonymously?”  Service Address fields: Enter the location of the inlet. Add additional information in the Description field.  \* Verify that you entered the address correctly by repeating the address back to the customer.  Description field: Enter any additional information about the inlet location or problem. Please be as specific as possible in the description.  Advise the customer:  \* If the inlets are at a single intersection with multiple corners, enter one service request. If inlets are at different intersections, enter one service request for each intersection.  \* PWD will inspect the inlet within 3 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** | The GIS layers to be displayed for the service request Location are:   * Zoning * Orthophotography   The GIS features to be displayed for a selected address are:   * Inlets * Schools * Traffic Signals   The GIS features used but not displayed are:   * Zoning (all) * Address Validation Service |
| **Other Information** |  |
| **Actions** | 1. Clinton, Steve, and Water Department: Verify that the GIS information can be retrieved and used as described in this document. *From Veronica Tyson on 04/07/14: Larry from PWD working on this with Clinton.* 2. Water Department: What statuses are really needed? *From Veronica Tyson on 04/07/14: Open, Closed, In Progress (check email from PikYan).* 3. Reporting: Do we need one service request for each inlet, or can one service request cover multiple nearby inlets? *From Veronica Tyson on 04/07/14: If location is a single intersection with multiple corners, one is fine. If different intersections, a request should be entered for each intersection.* 4. Water Dept.: Determine if “Date Last Cleaned” could be stored with the inlet GIS asset. Could use this to let customers know when the inlet was last cleaned? If the inlet has been cleaned within the last 90 days, the Water Dept. will not schedule it for cleaning it at this time. *From Veronica Tyson on 04/07/14: Larry from PWD is working on this with Clinton.* 5. Philly311 and Water Department: Need to determine the valid statuses for the service request. *From Veronica Tyson on 04/07/14: Open / Closed / In Progress.* |

# Approvals after Requirements Definition Workshop

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