# 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 Requirements Workshop | J. Kelly |
| 1.4 | 03/06/2014 | Revisions After Requirements Workshop | J. Kelly |
| 1.5 | 04/07/2014 | Added responses to Action Items #1 and 2. Updated the valid statuses. | J. Kelly |
| 1.6 | 06/04/2014 | Adding Redress changes | Sreelatha SK |
| 1.7 | 08/19/2014 | Updated based department feedback | 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 (PWD) |
| **Record Type Name** | Hydrant Request |
| **Record Type Description** | To record Fire Hydrant that is leaning or knocked down and not leaking water |
| **Process Overview** | 1. Constituent requests the service 2. The Agent creates a case by selecting the *Hydrant Knocked Down (No Water)* ***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 *Hydrant Knocked Down (No Water)* ***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** | | Hydrant Knocked Down | 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** | | Hydrant Knocked Down | Hydrant Knocked Down | < ? > | | 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** | | Water Coming Out of Hydrant | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #1 | No | If water is coming out of the hydrant? | | 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? | | Hydrant 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 hydrant knocked down? | | Owner | Text(255)  Autopopulated with name of the owner of the hydrant. | Yes | None | No | Who owns the hydrant? |   **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 *Water Coming Out of Hydrant* | If water is coming out of the hydrant, transfer the request to the Water Emergency queue by calling 215 685-6300. | Evaluate the rule when a record is created, and every time it’s edited. | *Water Coming Out of Hydrant* = ‘Yes’ | Display Message: “Contact Water Emergency by calling 215- 685-6300”  Continue to Create Case as Hydrant Request | | 2 | 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 report a fire hydrant that is not working or knocked down.  Contact fields: Enter the customer’s name and phone number for follow-up.   * + 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 address of the hydrant that is knocked down. 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 knocked down fire hydrant or its location.  Advise the customer:  \* It may take up to 45 days to repair a hydrant, as below surface damage may have been caused if the hydrant was knocked over or parts may have to be replaced. |
| **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:   * Hydrants * Schools * Parks * 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. Philly311 and Water Department: 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** |
|  |  |  |
|  |  |  |