UNISYS

City of Philadelphia 311

Global Service Request Standards (Version 2)

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# Document Overview

The purpose of this document is to define the standards being used to record and resolve service requests received by the City of Philadelphia, which will apply to all Service Requests created by the city, unless noted otherwise in the specific documentation for that Service Request. A **Service Request** is a Case in Salesforce that cannot be resolved immediately by the agent taking the call, and must be sent to another department for resolution or held for further evaluation by the 311 team.

# Standard High-Level Steps for Processing a Service Request

The following “standard” high-level steps will be used to process a typical service requests:

1. Customer requests a service
2. The agent enters keywords corresponding to the type of request required into the Global Search box and clicks the Global Search button.
3. Results from the search are displayed including **311 Service Requests**, existing **Cases**, and Knowledgebase **Articles** that relate to the search parameters.
4. The Agent creates a case by selecting the ***Create Case*** link next to the closest corresponding 311 Case Type for the service being requested. The system will display a screen that contains the **Page Layout** form in the center panel, a **Flow** script in the left sidebar, and **Suggested Articles** in the right sidebar.
   1. The **Page Layout** contains the form where the agent will record the information obtained from the caller relating to the case. The Page Layout will be specific to the type of case being created and, based on the values entered into the fields on the layout, may trigger a different Case Type and Page Layout to be displayed.
   2. The **Flow** in the left sidebar contains knowledge items associated with the Page Layout to assist the agent in completing the form and providing additional information to the caller.
   3. **Suggested Articles** provides links to Knowledgebase articles corresponding to the Case Type being created. The *Subject* field in the Page Layout, which is auto-populated when the Page Layout is displayed, will focus the search to more specific topics.
5. As the agent populates the Page Layout, fields within the layout will dynamically become active or disabled based on the responses entered into prior fields. The Page Layout is structured to match the order in which the agent will question the caller to obtain the information required to complete the request. Generally, the layout should adhere to the standard format specified in this document, with some variation to accommodate specific Service Request requirements.
6. When obtaining the contact information, the caller will attempt to create or locate a Contact record to associate with the customer. If the caller will not give enough information to make this possible, the agent will attempt to obtain a zip code. The zip code field will be populated automatically by the contact assignment, if one is made, otherwise it will be manually entered by the agent.
7. When the agent reaches the Service Request Location section of the Page Layout, the agent will enter an address which will then be verified against the GIS database.
   1. The agent will enter an address into the *Street* field in the Service Request Location section.
   2. After entering the address, the agent will press the ellipse button (…) to render a lookup map.
   3. When the map renders, the agent will press the **locate** button to verify the address.
   4. If the address is verified, the map will center on the selected location, and the Service Request form will be populated with the validated address
      * If the address cannot be located, a popup will notify the agent of this, and give the agent the opportunity to attempt another address.
   5. Other fields may be populated in the Page Layout, utilizing ESRI layers based on the geolocation of the address. To display these layers press the **add layers** button at the top of the page.
   6. The map will also display duplicates of an identical (or similar) Service Request Type.
      * Other service requests will be denoted as symbols on the map as well as in a list on the right side of the map, making overlapping duplicates easier to identify.
      * A case may be marked as a duplicate by either by hovering over the duplicate case in the map and selecting **Relate** from the popup box, or by selecting **Relate** from the list on the right.
      * Marking a Case as a duplicate will **Close** the current Case and make it a child of the selected Case.
8. Once the agent has determined the location and completed the additional fields required by the Service Request Type they will Save the Case. Saving the Case will trigger the following actions:
   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 proper assignment ***Queue*** representing the group of users responsible for resolving this type of service request (see Standard Case Assignment Rule).
   4. Creates an associated ***Case Comment*** record if the “Internal Comments” field was populated.
   5. Sends an email to the contact indicating a new case has been created for their request if the “**Send Emails to Contact**” checkbox is selected.
      * The standard “Case Creation” template will be used for the email.

# Standard High-Level Steps for Processing a Service Request

These steps will be taken by Departments that are not using some other request management system to handle their service requests.

1. A Queue member changes the case “Status” from “New” to “In-Progress” and takes the steps needed to complete the request for service.
   1. If desired, the Queue member can add Comments, Tasks, Events, Emails, and Attachments to the case or transfer the case to another queue or individual.
2. A Queue member “closes” the case when all steps needed to resolve the case have been completed.
   1. An email will be sent to the contact if the “Notify Contact on case close” checkbox is selected when closing the case.
      * The standard “Case Closed Email Response” template will be used for the email.
3. If a customer reports that a closed case has not been adequately addressed, and the case has been closed within the last 30 days, a **Redress** may be created.
   1. The agent selects the ***Redress*** button
   2. Verify that the case is within 30 days of close
   3. Create a new case with the same information
   4. Make the closed case the Parent of the new case

# Standard Case Fields Contained in the Standard Page Layout

The following describes the standard Salesforce fields and custom fields created for the City that will be contained in all Page Layouts associated with service request case Record Types (fields shown in the top-down order they appear):

## Department Details

| **Field Label** | **Field Type** | **Custom** | **R e q u**  **I**  **r**  **e**  **d** | **R e a d**  **O n l y** | **Validation**  **Rule #** | **H i s t o r y** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Type** | Picklist  **Values:** <Blank>,Service Request Type, Information Request Type, Directory Assistance  **Default:** Service Request Type | N | Y | N | None | Y | Field is initially auto-populated based on the Case Record Type being created. If this value is manually changed, it will result in a new Field Layout based on the new Case Record Type. |
| **Department** | Picklist  **Values:** License & Inspections, Fire Department, , Police Department, Streets Department, Philly 311 Contact Center, Community Life Improvement Program, Water Department (PWD)  **Default:** Determined by Case Record Type | Y | Y | N | None | N | Department will be automatically set based on Service Request Type. For an Information Request, this field will be automatically populated by the article. For Directory Services the field will default to 311 Services. |
| **Case Record Type** | Picklist  **Values:** The values available will be determined by the Department selected above.  **Default** = The type of Service Request created when the *Create Case* link was selected. | Y | Y | N | None | Y | Changing this field will determine the Page Layout to be displayed. |
| **Service Request Type** | Picklist  **Values:** Each Case Record Type will define one or more Service Request Type picklist values that are unique for that specific Case Record Type.  **Default** = If there is only one service request for a specific Case Record Type, it will be selected as the default. | Y | Y | N | None | Y | This field is initially auto-populated based on the Case Record Type chosen when creating the case. If this value is changed, it could result in a new Field Layout based on the new Case Record Type chosen.  If any value in the Other Case Information systems indicates that this should not be forwarded to another department as a Service Request, a value of “Request Not Required” will be assigned to this field, which will indicate that the Case should be closed upon save without being assigned to a queue. |

## Service Request Location Section

| **Field Label** | **Field Type** | **Custom** | **R e q u**  **I**  **r**  **e**  **d** | **R e a d**  **O n l y** | **Validation**  **Rule #** | **H i s t o r y** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Address / Intersection | Text(255) | Y | Y | N |  |  | Street of the Service Request Location. Also see Standard Workflow Rules. |
| Zip Code | Text(10)  Autopoulated from GIS based on *Address / Intersection* | Y | Y | Y |  |  | Zip Code of Service Request (Auto-populated) |
| L&I Address | Text(255) | Y | Y | Y |  |  | Auto-populated by GIS |
| City Council District | Number | Y | Y | Y |  |  | Auto-populated by GIS |

## Case Information Section

| **Field Label** | **Field Type** | **Custom** | **R e q u**  **I**  **r**  **e**  **d** | **R e a d**  **O n l y** | **Validation**  **Rule #** | **H i s t o r y** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Case Owner** | Lookup(User,Queue) | N | N | N | None | Y | When a case is created this field is set to the User creating the case. Upon save, the Standard Case Assignment Rule is executed and this field is updated to a Queue based on the case’s Service Request Type. Once the case is saved this field can be manually changed by a user. |
| **Case Number** | Auto Number | N | N | Y | None | N | The system automatically populates this field when a case is created. |
| **Customer Zip Code** | Lookup(Contact) | Y | Y | N | None | Y | This field will be populated by the Zip Code in the Contact record if one is associated with the case, otherwise the agent may populate it with a number from the caller. |
| **Contact Name** | Lookup(Contact) | N | N | N | None | Y | This field contains the Contact requesting the service. Ideally every case should have an associated contact. |
| **Customer Declined** | Checkbox | Y | D | N | Contact Name = NULL | N | A contact uses this field to confirm that a customer wants to remain anonymous. If field is not checked and Contact Name is blank agent will not be able to save case. |
| **Translator Required** | Picklist  **Values:** <Blank>, Yes, No  **Default** = None | Y | Y | N |  | N |  |
| **Language** | Dependent Picklist  (*Controlling Field =* ***Translator Required****)*  **Values:** <Blank>, Albanian, Arabic, Bengali, Cambodian, Cantonese, French, Haitian Creole, German, Greek, Hindi, Indonesian, Italian, Japanese, Karen, Korean, Mandarin, Polish, Portuguese, Russian, Serbian, Spanish, Thai, Urdu, Vietnamese, Other  **Default** = None  Display All if ***Translator Required*** = ‘Yes’ | Y | Y | N |  | N | This field is required when the Translator Required field is set to Yes. |
| **Other Language** | Dependent Text  (*Controlling Field =* ***Language****)*  If Language = ‘Other’ | Y | Y | N |  | N | This field is required when the Language field is set to Other. |
| **Account Name** | Lookup(Account) | N | N | N | None | N | This field contains the Account associated with the Contact record. |
| **Parent Case** | Lookup(Contact) | N | N | N | None | N | Two cases can be associated to each other via a parent/child relationship. This field identifies the “Parent” case. “Child” cases are displayed in the “Related Cases” Related List section for the “Parent” case. |
| **Case Origin icon** | Formula(Text) | Y | N | Y | None | N | Shows an image representing the value in the Case Origin field. The formula for this field is:  IMAGE(  CASE( Origin,  "Email", "https://<SalesforceOrg>.content.force.com/servlet/servlet.FileDownload?file=015K0000000238q",  "Phone",  "https://<SalesforceOrg>.content.force.com/servlet/servlet.FileDownload?file=015K0000000238R",  "Web",  "https://<SalesforceOrg>.content.force.com/servlet/servlet.FileDownload?file=015K000000023QL",  "/s.gif"),  "Origin Flag") |
| **Contact Phone** | Phone | N | N | Y | None | N | This display-only field is from the “Phone” field on the Contact record associated to the case. |
| **Contact Email** | Email | N | N | Y | None | N | This display-only field is from the “Email” field on the Contact record associated to the case. |
| **Status** | Picklist  **Values:** New, Open, In-Progress, Closed  **Default** = New | N | Y | N | None | Y | This required field defines the status of the case.   * “New” is the default value when creating a case. * When a case is changed to “In-Progress” the **Status Update** field must be populated. * All values except “Closed” are available when creating or editing a case.   “Closed” is the only value that can be selected when the “Close Case” button is used. |
| **Case Origin** | Picklist  **Values:**  <Blank>, Phone, Email, Web, Facebook, Twitter, Mobile, Text, Communities  **Default** = <None> | N | Y | N | None | Y | This field indicates the channel used by a customer to initiate a case. |
| **~~Priority~~** | ~~Picklist~~  **~~Values:~~** ~~1,2,3,4,5,6,7,8,9~~  **~~Default~~** ~~= 5~~ | ~~N~~ | ~~N~~ | ~~N~~ | ~~None~~ | ~~N~~ | ~~This field should not be displayed to customers or agents.~~ |

## Service Request Information

This will include fields that are specific to the Service Request being created. Specifications for these fields are included in the Requirements Definition for each Service Request.

Description Information Section

| **Field Label** | **Field Type** | **Custom** | **R e q u**  **I**  **r**  **e**  **d** | **R e a d**  **O n l y** | **Validation**  **Rule #** | **H i s t o r y** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Subject | Text(255) | N | Y | N | None | Y | This field will be populated with the Service Request Type when creating a new SR Case and the system will find and display Knowledgebase Articles using the content in the “Subject” field. |
| Status Update | Dependent Picklist  (*Controlling Field =* ***Status****)*  **Values:** <Blank>, Request created and submitted to servicing department, Customer reported issue closed and not resolved (Redress), Request has been received by servicing department, Investigation Conducted, Follow up investigation is scheduled, Assistance is required from another source, Case assigned to another servicing department  *Request created and submitted to servicing department, Customer reported issue closed and not resolved (Redress)* displayed If **Status** = ‘New’  *Request has been received by servicing department* displayed  If **Status** = ‘Open’  <Blank>, *Investigation Conducted, Follow up investigation is scheduled, Assistance is required from another source, Case assigned to another servicing department* displayed  If **Status** = ‘In-Progress’  *The case has been resolved and/or closed by the servicing department*  If **Status** = ‘Closed’ | Y | Y | N |  |  | This field provides a description of the Status of a case that is In-Progress |
| Comments | Long Text Area(32000) | Y | Y | N | None | Y | This field provides the in-depth description of the case. Specific information required in this field will be detailed in the Flow. |
| Internal Comments | Text Area(4000) | N | N | N | None | N | This field allows users to enter a Comment while creating or editing a case. Data entered in this field will be used by the system to create a Comment record that will be displayed in the “Case Comments” Related List section of the case. |

## Additional Information Section

| **Field Name** | **Field Type** | **Custom** | **R e q u**  **I**  **r**  **e**  **d** | **R e a d**  **O n l y** | **Validation**  **Rule #** | **H i s t o r y** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Date/Time Opened | Date/Time | N | N | Y | None | N | System populated field of the date and time the case was created |

## Case Location Section

This section will contain a Visualforce Page with custom code that displays a map showing the Service Request Location for the case. The fields in this section are NOT contained on the Standard Page Layout, but are required to display the Service Request Locations on the map.

## Resolution Information Section

This section will only be displayed on the Case Detail page and the fields will only be populated if the case is “closed”.

| **Field Label** | **Field Type** | **Custom** | **R e q u**  **I**  **r**  **e**  **d** | **R e a d**  **O n l y** | **Validation**  **Rule #** | **H i s t o r y** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Close Case Reason | Formula (Text) | Y | N | Y | None | N | This field shows what a user entered in the Reason field when they closed the case. The formula for this field is:  TEXT(Reason) |
| Resolution Description | Formula (Text) | Y | N | Y | None | N | This field shows what a user entered in the Issue Resolution field when they closed the case. The formula for this field is: Issue\_Resolution\_\_c |
| Date/Time Closed | Date/Time | N | N | Y | None | N | System populated field of the date and time the case was closed |
| Case Age in Business Days | Formula(Number) – Formula will need to be modified to reflect business days | Y | N | Y |  | N | This field shows the number of Business Hours between when the case was opened and when it was closed. The formula for this field is:  Case\_Age\_In\_Business\_Hours\_\_c  The Case Age in Business Hours field is populated by a trigger – see Standard Case Triggers. |
| Days Over / Under SLA | Formula | Y |  | Y |  |  | Age to Close in Business Days less SLA |
| SLA\_Past\_days\_\_c | Formula | Y | N | Y | None | N | Number of days past SLA based on Date/Time Opened field |

The following fields are NOT contained on the Standard Page Layout, but are needed to display the fields shown in the Resolution Information section:

| **Field Label** | **Field Type** | **Custom** | **R e q u**  **I**  **r**  **e**  **d** | **R e a d**  **O n l y** | **Validation**  **Rule #** | **H i s t o r y** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Case Age in Business Hours | Number(15,3) | Y | N | N | None | N | This field shows the number of Business Hours between when the case was opened and when it was closed. This field is populated by a trigger – see Standard Case Triggers. |
| Close Reason | Picklist  **Values:** <Blank>, Repair Completed, Issue Resolved, Information Provided, Referred to another organization, Unable to find issue at location  **Default** = None | N | Y | N | None | Y | This required field appears when a case is being closed. Users must select the appropriate reason for closing the case. |
| Issue Resolution | Text Area(255)  Required if **Case Reason** = ‘Information Provided’ OR ‘Referred to another organization’ | Y |  | N | None | Y | This field appears when a case is being closed. This field is required if the Case Reason is Information Provided or Referred to another organization, otherwise it is optional. Users may enter the details on how the case was closed. |
| Resolution | Long Text Area(32768) | Y |  | N | None | N | Resolution updated for Novo tickets |
| Finished Date | Text (35) | Y |  | N | None | N | Date updated for Novo tickets |

## Web Information Section

This section will only appear for cases submitted via Twitter or Facebook, which are not part of the Unisys standard Salesforce configuration. This section must contain the following fields:

| **Field Label** | **Field Type** | **Custom** | **R e q u**  **I**  **r**  **e**  **d** | **R e a d**  **O n l y** | **Validation**  **Rule #** | **H i s t o r y** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Web Email | Email | N | N | Y | None | N |  |
| Web Name | Text(80) | N | N | Y | None | N |  |
| Web Company | Text(80) | N | N | Y | None | N |  |
| Web Phone | Text(40) | N | N | Y | None | N |  |

## System Information Section

| **Field Label** | **Field Type** | **Custom** | **R e q u**  **I**  **r**  **e**  **d** | **R e a d**  **O n l y** | **Validation**  **Rule #** | **H i s t o r y** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Created By | Lookup(User) | N | N | Y | None | N | User that created the case |
| Last Modified By | Lookup(User) | N | N | Y | None | N | Last User that modified the case |

# Page Layouts

## New Case

### Buttons

* Save
* Save & Close
* Cancel

### Sections

|  |  |
| --- | --- |
| Section Title: | **Department Details** |
| Fields: | Type |
|  | Department |
|  | Case Record Type |
|  | Service Request Type |

|  |  |  |
| --- | --- | --- |
| Section Title: | **Service Request Location** | |
| Fields: | Address / Intersection | (…) |
|  | Zip Code |  |

|  |  |  |
| --- | --- | --- |
| Section Title: | **Case Information** | |
| Fields: | Contact Name | Customer Zip Code |
|  | Customer Declined | Translator Required |
|  | Language | Other Language |
|  | Status | Service Request Origin |

|  |  |
| --- | --- |
| Section Title: | **Service Request Information** |
| Fields: | Specific to Case Record Type |

|  |  |
| --- | --- |
| Section Title: | **Description Information** |
| Fields: | Subject |
|  | Status Update |
|  | Comments |
|  | Internal Comments |

|  |  |  |
| --- | --- | --- |
| Section Title: | **Optional** | |
| Fields: | Send Update Emails to Contact |  |

## Service Request Detail

### Buttons

* Edit
* Delete
* Close Service Request
* Redress

### Sections

|  |  |
| --- | --- |
| Section Title: | **Department Details** |
| Fields: | Type |
|  | Department |
|  | Case Record Type |
|  | Service Request Type |

|  |  |
| --- | --- |
| Section Title: | **Service Request Location** |
| Fields: | Address / Intersection |
|  | Zip Code |

|  |  |  |
| --- | --- | --- |
| Section Title: | **Case Information** | |
| Fields: | Service Request Owner | Service Request Number |
|  | Contact Name | Customer Declined |
|  | Contact Type | Customer Zip Code |
|  | Account Name | Parent Service Request |
|  | Contact Email | Contact Phone |
|  | Translator Required | Language |
|  |  | Other Language |
|  | Case Origin Icon | Status |
|  | SLA | SLA Exceeded |
|  | Service Request Origin | Date/Time Opened |

|  |  |
| --- | --- |
| Section Title: | **Service Request Information** |
| Fields: | Specific to Case Record Type |

|  |  |
| --- | --- |
| Section Title: | **Description Information** |
| Fields: | Subject |
|  | Status Update |
|  | Comments |
|  | Internal Comments |

|  |  |  |
| --- | --- | --- |
| Section Title: | **Resolution Information** | |
| Fields: | Close Reason | Case Age in Business Days |
|  | Date/Time Closed | Days Over / (Under) SLA |

### Chatter box

**Address/Intersection** displays Service Request location on hover.

# Standard Related Lists Contained in the Standard Page Layout

The following describes the “standard” ***Related Lists*** that will be contained in all Page Layouts associated with service request case Record Types (lists are shown in the order they appear):

## Articles

This related list displays all Knowledgebase Articles that have been associated to the case.

## Related Cases

When a case is being created or edited it can be designated as a “Child Case” by setting the “Parent Case” using the “Parent Case” lookup field. This related list displays all of the “Child Cases” for a “Parent Case”.

## Open Activities

This related list displays open tasks and open event (appointment, call, email, meeting, etc.) that have been associated to the case. A calendar can also be displayed showing scheduled events.

## Activity History

This related list displays all completed tasks, logged phone calls, saved interaction logs, expired events, outbound emails, and merged documents that have been associated to the case.

## Case Comments

This related list displays all the Comments that have been associated to the case.

## Case History

This related list displays all changes to any field on the case that had the “Track History” option set.

## Attachments

This related list displays all attachments that have been associated to the case.

# Standard Flow

The flow will be used to provide the agent with special instructions specific to the Service Request Type they are creating. The purpose of this Flow is not to completing replace the material stored in the Knowledgebase, but provide the agent with enough information to complete the Case. If the caller is requesting more specific information then is provided in the flow, the agent should refer to the Knowledgebase articles provided in the right sidebar. Generally, the information provided in the flow will observe the following format (there should be white space between each section):

* **Purpose**: Describes the Service Request for the Page Layout the agent is currently completing.
* **Contact**: Gives the agent any specific reasons that the fulfilling departments may have for requiring the callers Contact information. This is to assist the agent in persuading the caller to provide this information.
* **Service Request Location**: Provides any specifics that are required when obtaining the Service Address for this Service Request Type.
* **Comments**: States any additional information that may be required in the Description field in the Page Layout.
* **Advise the constituent**: Any additional information that the department would like the agents to give to the caller while before completing the call.

# Standard Support Process

Support processes use the ***Status*** field to identify a case within the support lifecycle. Most 311 Contact Centers create one ***Support Process*** that determines the picklist values available for the case ***Status*** field, with “New” set as the default value displayed when creating a new case. The following is the “standard” ***Support Process*** to be used with all case ***Record Types***:

* New
* Open
* In-Progress
* Closed

# Close Case

The following fields should be displayed on the Close Case page:

* Status
* Case Reason
* Comments
* Internal Comments

The City of Philadelphia is not using Solution Information.

# Standard Profiles

All Case Record Types will be made available to the following Profiles:

* 311 Agents, 311 Supervisors, and System Administrators

# Standard Case Escalation Rules

Escalation Rules allow you to define automated actions when cases with specific criteria are “open” after a specified period of time. They can help you identify when cases have fallen outside of an intended service level. When escalating a case, you can choose to automatically notify a user, reassign the case to another user or queue, or both.

The City has opted to manually escalate cases on an as needed basis instead of using automatic case escalation rules. This can be accomplished as follows:

* Select the “Change Status” button for the desired case(s) and update the “Status” to “Escalated”.
* Select the “Change Owner” button for the desired case(s) and select the appropriate “User” or “Queue” responsible for managing the escalated case(s).

There are no “standard” ***Case Escalation Rules*** at this time.

# Standard Case Assignment Rule

The standard assignment methodology is to assign each unique Service Request Type to a Queue, representing the group of users responsible for resolving that type of case, whenever the Service Request Type is updated. Each ***Service Request Type*** must be addressed by one of the “Rule Entries” that are executed sequentially based on the Order value. For departments that utilize a separate work order management system, the assignment queues will be used primarily as aggregators for reporting purposes.

# Standard Case Validation Rules

Validation Rules help improve data quality by preventing users from saving incorrect data. You can define one or more validation rules that consist of an error condition and corresponding error message. Validation rules are executed at record save time. If an error condition is met, the save is aborted and an error message displayed.

There are no “standard” ***Case Validation Rule***at this time. Rules will be set by specific Service Request Type.

# Standard Case Workflow Rules

Contact Centers operate more efficiently with standardized internal procedures and automated business processes. Many of the tasks you normally assign, the emails you regularly send, and other record updates are part of your organization's standard processes. Instead of doing this work manually, you can configure Workflow Rules to do it automatically.

Each workflow rule consists of:

* Criteria that cause the workflow rule to run.
* Immediate actions that execute when a record matches the criteria, such as sending an email or updating a field.
* Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers.

# Standard Case Triggers

A Case trigger is Apex code that executes before or after specific Data Manipulation Language (DML) events occur, such as before a Case record is inserted into the database.

Unisys has developed the following “standard” ***Case Trigger***:

CalculateBusinessHoursAges: Calculates the total business hours between when a case was opened and when it was closed and then populates “Case Age in Business Hours” field, which is displayed in the “Age to Close in Business Hours” field shown within the “Resolution Information” section of the case.

# Standard Contact Triggers

A Contact trigger is Apex code that executes before or after specific Data Manipulation Language (DML) events occur, such as before a Contact record is inserted into the database.

Unisys has developed the following “standard” ***Contact Trigger***:

Account\_Name\_Update: When a new Contact is created during the case creation process, the system does not allow for an Account to be associated to the Contact, yet Account is a required field for a Contact. Whenever a new Contact is created without an Account, this trigger will associate the Account record with Name = “City of Philadelphia” to the Contact record.