# Requirements Overview

The purpose of this document is to record the functional requirements needed to successfully implement telephony scripts for Philly311 CRM.

# Workshop Location and Time: 29 January 2014; City Hall Conference Room 153

# Workshop Attendees:

* Clinton Johnson
* Sheryl Johnson
* John Kelly
* Michael Schmidt
* Sreelatha Susheela Kenchappa
* Tacheena Thompson
* Jamie Timmons

# Requirements

**Pilot**

For the six (6) service request types and one (1) information request type (listed above), Unisys will configure:

* A Page Layout (based on the approved Business Configuration document) for selecting the appropriate service request type and entering:
  + Constituent name and contact information,
  + Location of the issue (using the City’s address validation services) based on the Business Configuration Design Document,
  + A description of the issue text box,
  + Other information as may be applicable to the type of request based on the Business Configuration Design Document

**Citywide Implementation**

* A Page Layout (based on the approved Business Configuration document) for selecting the appropriate service request type and entering:
  + Constituent name and contact information,
  + Location of the issue (using the City’s address validation services) based on the Business Configuration Design Document,
  + A description of the issue text box,
  + Other information as may be applicable to the type of request based on the Business Configuration Design Document

| **Reference Number** | **Service Request Requirements** | **Type** | **Implementation Plan** | **How Provided** | **Workshop Notes** |
| --- | --- | --- | --- | --- | --- |
| 1.21 | The solution provides an ability to recognize repeat callers/web users and assign unique identifier appropriately | N | **Repeat callers** will require CTI (**not in scope**). **Repeat web users** will be recognized by having users set up a unique login Id/pw that will be required for entry. The ability to recognize repeat web users will be configured in the Self Service (Community Portal) | SFDC Service Cloud | If the agent is able to obtain an verifiable name, all contacts will be recorded in the contact record. |
| 2.26 | The solution provides ability to allow a constituent to opt-out of any script at any time along the process | F | SFDC Service Cloud application will be configured to implement this requirement | SFDC Service Cloud | Some Service Requests will automatically redirect the agent based on the caller’s response to the agents queries. |
| 2.34 | The solution provides ability for requests submitted via constituent self-service to be automatically routed to the Philly311 call center for prompt resolution based on the City's business rules as defined in the CRM system | F | SFDC Service Cloud application will be configured by creating workflow rules to route service requests per the City's defined business rules in the CRM. | SFDC Service Cloud | A queue will be configured for the agents that will handle all requests submitted via the portal. **This requirement will also need to be addressed in the Portal Requirements.** |
| 2.35 | The solution provides ability for call center agent to retrieve a service request that was submitted online via self-service | F | SFDC Service Cloud application will be configured to implement this requirement. Agent will have access to all SRs submitted either online or by agent | SFDC Service Cloud | Agent will be able to retrieve request by case number or constituent name. If those are not available, Global Search may be utilized to find the request using other parameters. |
| 2.36 | The solution provides ability to detect duplicates when a call comes into Philly311 and a constituent has already submitted a request. | CU | SFDC Service Cloud application will be configured by creating VisualForce components to list proximate SRs at the address where the new service request is being created. | SFDC Service Cloud | This will be address using GIS mapping capabilities. |
| 2.37 | The solution provides ability for call center agent to retrieve any documents or images included with a service request submitted online via self-service | F | SFDC Service Cloud application will be configured to implement this requirement | SFDC Service Cloud | All correspondence related to a case will be stored in the related case record. |
| 3.07 | The solution provides ability to create scripts for call center agents to prompt them to ask drill-down questions and collect all necessary information to process a request | F | SFDC Service Cloud application will be configured to implement this requirement | SFDC Service Cloud | Flow will be utilized to provide the agents with information relevant to the Service Request they are handling. Specifics will be detailed in the individual Service Requests. |
| 3.08 | The solution supports branching based on responses to questions in script | F | SFDC Service Cloud application will be configured by creating multiple VisualForce pages to support branching based on responsed to questions. | SFDC Service Cloud | Depending on the responses selected in fields included in the Page Layout, the agent may be redirected to a different Service or Information Request type. |
| 3.09 | The solution provides ability to modify, delete or archive scripts | F | SFDC Service Cloud application will be configured to implement this requirement | SFDC Service Cloud | Only certain call center staff will have this ability, and will need to receive specific training. |
| 3.21 | For certain service requests (e.g., those generated by a new Philly311 agent or those generated external to the 311 call center), the solution provides ability for a city employee to review the content prior to the service request being placed in a departmental queue | F | SFDC Service Cloud application will be configured by creating workflow and validation rules to ensure a city employee reviews content of certain service requests prior to it being placed in a particualr departments queue. | SFDC Service Cloud | Service Requests for specified employees (i.e., Probational Agents) will be directed to a Supervisors Queue for approval. |
| 7.08 | The solution provides the ability to allow call takers to directly connect calls, service requests, and work orders to assets, which are stored in GIS (e.g., street centerlines, poles, RFID license medallions, and intersections) | CU | SFDC Service Cloud application will be configured by creating APEX callouts and VisualForce components to connect data to assets stored in GIS. The solution will interact with City provided address validation services | SFDC Service Cloud | This will be addressed more specifically in the **ESRI/GIS Requirements**. |
| 7.11 | The solution provides the ability to assist call takers in identifying related calls by displaying related case types in a map using user-defined criteria | CU | SFDC Service Cloud application will be configured by integrating to City's ArcGIS servers to VisualForce components and APEX callouts to display related service requests on a map. | SFDC Service Cloud | This will be addressed more specifically in the **ESRI/GIS Requirements**. This function is also used for duplicate detection. |

# Action Items – The City

* The City of Philadelphia will assist in the development of scripting for the agent flows. This includes the migration and editing of existing Novo articles.

# Action Items – Unisys

* Configure the SFDC Service Cloud platform and Community Portal per the approved Business Configuration Design Document including:
  + Search capabilities for locating Service Requests, Information Base articles, and related existing cases.
  + Agent scripts will be incorporated into the flow based on feedback from the city. These will be documented in the individual Service Request Requirements Definitions.
* For each configuration item to be system and integration tested under this SOW for the Pilot implementation, Unisys will migrate the flows, Service Request and Interface configurations to the production environment after the successful completion of testing by the Unisys team.
* Develop, distribute and review a Business Configuration Design Document. The Business Configuration Design Document details the design of the SFDC Service Cloud platform and the Community Portal for the City of Philadelphia including the service requests, flows, screen mock up, etc.
* Citywide Implementation: Configure the SFDC Service Cloud and Community Portal per the approved Business Configuration Design Document including:
  + Flows
  + User assignment to appropriate Profiles
  + Case assignment to appropriate queues
* Citywide Implementation: For each configuration item to be system and integration tested under this SOW, Unisys will migrate the flows , Service Request and Interface configurations from the Development (DEV) environment to the Quality Assurance and Test (TST) environment
* Citywide Implementation: Develop, distribute and review a Business Configuration Design Document. The Business Configuration Design Document details the design of the SFDC Service Cloud and the Community Portal for the City of Philadelphia including the service requests, flows, screen mock up, etc.

# Meeting Notes

In addition to the requirements stated above, the following requirements were also expressed during the workshop:

* A change to the selection mechanism will be developed providing the agent search capabilities when selecting a Service Request.
* Integration of L&I Help Box functionality into the Salesforce environment. Specifics of this will be discussed during the L&I requirements workshop sessions.
* Survey Monkey will be utilized to conduct caller satisfactions surveys. The caller will need to be transferred to a survey operator/agent after the conclusion of the session with the 311 agent. If an email has been collected, the caller may be given the option to receive a survey via email.
* Certain “Specialists” besides the Supervisors will be given enhanced capabilities to approve and modify requests.
* Reporting will need to be instituted to determine if the same caller is making identical requests repeatedly.

Upon approval, the requirements stated above will be given a Requirements Traceability designation.