

<b>City of Pittsburgh - Customer Relationship Management Requirements</b>	
	<b>Instructions:</b> For each requirement please use the following response codes to indicate your response. The comments column may be used to provide any additional, pertinent information but is not required to be filled in.
<b>F</b>	Provided fully functional out of the box or with configuration (no custom development)
<b>CU</b>	Customization/Software Enhancement (Any custom development)
<b>TP</b>	Third-party Software Required to Fully Provide Requirement (Third-party Software Must be Proposed)
<b>SR</b>	Provided with Standard Report or Reporting Tool
<b>CR</b>	Custom Report Development Required
<b>N</b>	Not Included in this Proposal

Reference Number	Service Request Requirements	Type: F , CU, TP SR, CR, N
<b>Service Request Entry</b>		
1.01	The solution provides ability for the user to select the service request category type from a drop down list	
1.02	The solution provides system generated unique service transaction number (identifier) after a service request is created	
1.03	The solution provides status field that includes, but is not limited to, open, in progress, suspended, field verification, on hold, complete, escalated, or other	
1.04	The solution provides ability to link forms (such as PDF) and other documents (e.g., pictures) to requests	
1.05	The solution provides ability to auto-populate fields based on previous calls or other known data	
1.06	The solution provides ability for a service request type field to allow distinction between initial or follow-up inquiry	
1.07	The solution provides ability to capture the following types of intake data, including but not limited to: date, constituent profile data, issue type, issue description, time of day problem occurring, safety concern, location	
1.08	The solution provides ability to force required entry of fields based on service request type	
1.09	The solution provides ability for agent to see service level agreement for service request type	
1.10	The solution provides ability to capture the asset linkage data	
1.11	The solution provides easy-to-use interface that allows users quick access to frequently used functions	
1.12	The solution provides ability to set up appointments via a calendaring feature	

1.13	The solution provides a template for "actions to be taken" field(s) to provide for complete documentation of the resolution the request	
1.14	The solution provides ability to allow entry for multiple address description for the same location per service request, each able to be assigned a type code (e.g., reporting, mailing, problem location, vanity address, etc.) which can be verified against the city's GIS system, utilizing the GIS layer appropriate to the type of service request	
1.15	The solution provides ability to display existing open service requests when the agent enters an address and, should the constituent be calling about an existing request, allow that information to be added to the original ticket so that a count of callers on the same request can be maintained	
1.16	The solution provides ability to add additional information regarding the exact location of the service request issue (e.g., actual location of plumbing or downed tree)	
1.17	The solution provides ability to automatically determine duplicate requests by type, date range, and physical location/geography (e.g., alleys, location in park, open field, etc.)	
1.18	The solution provides ability to create parent-child relationships, so multiple service requests may be linked to a master request	
1.19	The solution provides ability to link more than one master service request to another master service request	
1.20	The solution provides a unique identifier for each constituent, so that all requests and contacts from a constituent may be linked (e.g., for the purpose of providing a history for that constituent)	
1.21	The solution provides an ability to recognize repeat callers/web users and assign unique identifier appropriately	
1.22	Noting that some constituents may choose to remain anonymous, the solution provides ability to require agent to satisfy a prompt about the constituent's choice	
1.23	The solution provides administrative tools for name correction, duplicate checking, and merging of contacts	
1.24	The solution provides an undo function	
1.25	The solution requires user confirmation of a deletion	
1.26	The solution provides an automatic default to today's date with ability to override	
1.27	The solution provides ability to record activity notes related to a request, that are unlimited in length, and provide scrolling capabilities for viewing	
1.28	The solution provides ability to display notes in reverse chronological order and include author identification	
1.29	The solution provides automatic date/timestamp by user ID for all activity	
1.30	The solution provides ability to record person making an activity note entry based on user ID	
1.31	The solution provides spellchecker capabilities	
1.32	The solution provides ability to set up approval authority based on request type or task	

1.33	The solution provides ability to display the constituent's previous interactions using different search features	
1.34	The solution provides ability to prevent a request from being closed until all associated work is completed	
1.35	The solution provides ability to have the knowledge base content and service request form simultaneously appear on the computer monitor	
1.36	The solution provides ability to initiate a service request from within a knowledge base article using appropriate template for service request entry based on request type	
1.37	The solution provides ability to initiate an inquiry record from within a knowledge base article to record the topic of the call	
1.38	The solution provides context-sensitive online help when a procedure is incorrectly executed	
	<b>Routing &amp; Escalation</b>	
1.39	The solution provides ability to automatically route constituent requests and items to the appropriate provider, department or staff for prompt action, to notify the department that the request is in queue, and to allow the department to forward the request to another department or return it to Philly311 if necessary	
1.40	The solution provides ability to route a service request to an outside agency	
1.41	The solution provides ability to establish SLA's for each of the steps in a request that is sent to multiple departments	
1.42	The solution allows tasks to be routed or re-routed manually to work queues	
1.43	The solution allows notification of an item in the work queue (or member(s) of group) via email or dynamic refresh of the work queue display	
1.44	The solution provides ability to automatically assign staff on a geographic basis	
1.45	The solution provides ability to automatically assign staff on a project/task basis	
1.46	The solution provides ability to route a service request to multiple departments and enable all parties to maintain visibility to status	
1.47	The solution provides ability to automatically assign a priority code, based on transaction type, with an override allowed (e.g., for city council requests, managing director's office requests, service requests which impact a large group of constituents, time sensitive, or after hours requests)	
1.48	The solution provides ability to escalate requests manually, or automatically based on predefined escalation rules (e.g., when a SLA expires.)	
1.49	The solution provides ability to automatically escalate service requests that indicate the presence of a critical safety issues. Should include ability to provide prompts/questions to agent to help in determining level of criticality, including taking actions such as warm transfers to 911.	
1.50	The solution provides ability to create and update automatic or manual reminders that are time triggered and defined for each query type	

1.51	The solution provides alerts and notifications to responsible party upon call assignment or when past due	
1.52	The solution provides automatic escalation to supervisor for past due, emergency, high visibility/urgent requests or large volumes of requests	
1.53	The solution provides ability to set business hours in calculation of performance against SLAs, noting that business hours may be different across different service request types	
1.54	The solution provides ability to flag a service request as "under investigation". This will cause the system to retain the service request and all associated attachments as long as the record remains under investigation, even if normal records retention policy rules would have deleted it.	
	<b>Multi-Channel Integration</b>	
	<b>The solution provides ability to accept requests or inquiries and track those requests in a single database or source from multiple channels, including:</b>	
1.55	In person	
1.56	By phone	
1.57	By mail	
1.58	By kiosk	
1.59	By text	
1.60	By TTY	
1.61	By E-mail	
1.62	Over the web	
1.63	Via smartphone	
1.64	Via social media technology	
	<b>Communications Management</b>	
1.65	The solution provides ability to support both unstructured and structured inbound e-mails	
1.66	The solution provides ability to date/timestamp attachment entries	
1.67	The solution provides ability to identify the user who attached a document	
1.68	The solution provides the ability to recognize invalid format or entries	
1.69	The solution provides ability to share service request-related notes generated by city personnel with constituents	
1.70	The solution provides internal real-time message routing capability for broadcasting content to all, or a specific group of users	
	<b>Documentation Management</b>	
1.71	The solution provides ability to handle storage and versioning of Microsoft products (Word, Excel, PowerPoint, etc.)	

1.72	The solution allows user to check in/check out/store documents without going through menu options within these products	
1.73	The solution provides the ability to view documents in their native format without having the original application loaded on the viewer's computer	
1.74	The solution provides ability to manage documents (including photos) by role and classification to ensure protected information is not inadvertently released or compiled inappropriately	

Comments








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Reference Number	Constituent Self-Service	Type: F , CU, TP SR, CR, N
2.01	The solution provides ability for the City's public web site to interface to the CRM tool's database so that constituents can access it via the web	
2.02	The solution provides ability to transfer banner ads to the web and mobile devices	
2.03	The solution provides ability for constituent to create a user-defined map with updated service request content	
2.04	The solution provides ability for the public web site to provide instructions for non-English speaking individuals	
2.05	The solution supports the presentation of information through a limitless number of web links	
2.06	The solution provides the ability for a constituent to use a single account log-in to access a variety of City services regardless of the department offering the service for the purpose of submitting or tracking requests	
2.07	The solution provides ability for constituents to create (and change) a personal password	
2.08	The solution provides ability for constituents to submit requests anonymously, based on request type	
2.09	The solution provides ability for constituents to submit and update personal contact information in a constituent profile which would be validated by the City	
2.10	The solution provides ability to create a contact log which identifies the frequency and amount interactions with constituents, regardless of channel utilized	
2.11	The solution provides ability to send e-mail confirmations of any changes constituents made to their constituent profile	
2.12	The solution provides ability to tailor the web entry forms for public use to a subset of transactions used by the City	

2.13	The solution provides ability for web entry forms for the public to use the same business-defined editing rules as transactions entered by a City operator	
2.14	The solution provides ability to notify constituent of the expected SLA for the request type and direct them to place a call for more urgent needs	
2.15	The solution provides ability to provide additional information defined for the request type such as questions that determine whether the appropriate request type has been selected	
2.16	The solution provides ability for on-line service requests to generate error messages indicating the missing information if all required information is not inputted	
2.17	The solution provides ability for City to temporarily disable certain service requests (e.g., not allow salting request to be processed while snow plowing is still begin performed)	
2.18	The solution provides ability to conduct on-line transactions and reservations, including but not limited to: parks, programs, etc.	
2.19	The solution provides ability to validate addresses entered by the constituent on a self-service request	
2.20	The solution provides ability to optionally require an e-mail address confirmation on entry point	
2.21	The solution provides ability for constituent to attach a document or image to the service request	
2.22	The solution provides ability to create a business rule which limits the number of attachments that can be posted to a single service request	
2.23	The solution provides a trouble-shooting guide for constituents that is interactive and intuitive	
2.24	The solution provides ability to track user's activity when they are attempting to resolve issues	
2.25	The solution provides ability to post web entries as real-time transactions to the CRM database	
2.26	The solution provides ability to allow a constituent to opt-out of any script at any time along the process	
2.27	The solution provides ability for requestor to print the service request via PDF that can be time stamped	
2.28	The solution provides ability to display to the constituent a confirmation page after submission of service request on the web	
2.29	The solution provides ability to automatically send an email to the constituent that submits a request through the website to acknowledge receipt with the unique service request number	
2.30	The solution provides ability for constituent to identify multiple email addresses to be used for confirmation or status updates	
2.31	The solution allows constituents to review the status of a service request or their service request history	
2.32	The solution provides ability to control how or if additional information can be added to an existing service request	
2.33	The solution provides ability to notify constituent upon change of status such as completion of request	
2.34	The solution provides ability for requests submitted via constituent self-service to be automatically routed to the 311 Response Center for prompt resolution based on the City's business rules as defined in the CRM system	

2.35	The solution provides ability for call center agent to retrieve a service request that was submitted online via self-service	
2.36	The solution provides ability to detect duplicates when a call comes into the 311 Response Center and a constituent has already submitted a request.	
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	
2.38	The solution provides ability to automatically send constituent satisfaction survey based on request type within a user-defined timeframe	
2.39	The solution provides ability for constituents to opt-in/out of e-mailings, newsletters, survey and/or special promotions	






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Reference Number	Configuration & Workflow	Type: F , CU, TP SR, CR, N
<b>Configuration</b>		
3.01	The solution ensures that City of Pittsburgh name and seal can be branded on the application such that the look and feel can be made consistent with the city's Internet site	
3.02	The solution provides ability to define service level agreements for each service request type	
3.03	The solution provides ability to create user-defined fields that are searchable and define default values and edit rules for them	
3.04	The solution provides calendar pop-up functions for all date-related fields that are created	
3.05	The solution provides ability to create requests that allow quick recording without detailed information, during extraordinary events	
3.06	The solution provides ability to establish and/or revise status dates such as receipt, assignment/approval, effective/start, projected/targeted start, projected time interval, expected completion, suspension, resume, completed and/or close dates based on user-defined parameters	
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	
3.08	The solution supports branching based on responses to questions in script	
3.09	The solution provides ability to modify, delete or archive scripts	
3.10	The solution provides the ability to establish user-defined workflow options per request type	
3.11	The solution provides ability to establish work queues for each department, or sub-department, for routing of requests	
3.12	The solution provides ability to manage different permissions for access to data and service request types based on user profile	

3.13	The solution provides ability to configure system view (or dashboard) based on user profile so that each user has ready access to the most pertinent CRM functionality and current status information for their role	
3.14	The solution provides ability to create customer satisfaction surveys that can be delivered via phone, e-mail or web according to preferred contact method	
3.15	The solution provides the ability to transfer collected information with the workflow, including attachments	
	The solution provides the ability to easily maintain workflow tables to perform functions including, but not limited to:	
3.16	o Add new workflow group	
3.17	o Add/delete/change member in workflow group	
3.18	o Set permissions for what group can workflow to what other groups	
3.19	The solution provides graphical tools to devise/revise workflow	
3.20	The solution provides ability for a supervisor/manager to see workflow assigned within their workgroup(s)	
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	




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Reference Number	Knowledge Base	Type: F , CU, TP SR, CR, N
4.01	The solution provides an easy to use online phone and service directory searchable by name, special event, service provided, or department/division. Provide ability to include appropriate web links.	
4.02	The solution provides ability to have two separate knowledge base / FAQ databases: an internal-facing database and a public-facing for access by constituents	
4.03	The solution allows the knowledge base and FAQ's to contain sections (including portions of pages) so viewing may be restricted based on the department and / or specific user permissions	
4.04	The solution provides an online contact directory for commonly requested non-city agencies	
4.05	The solution provides Frequently Asked Questions (FAQs) that are definable and searchable	
4.06	The solution provides ability to set permissions so that FAQs display only to internal users, such as specific departments, or publish to the city's website for access by constituents	
4.07	The solution allows FAQs to be sorted into categories and subcategories	
4.08	The solution allows attachments to be associated with FAQs such as forms, brochures, photographs, pamphlets, calendar of events, etc.	
4.09	The solution provides driving directions support and display other relevant information available for locations such as parking and public transportation options	
4.10	The solution provides ability to search the knowledge base using full-text search (e.g., natural searching) and wildcard searches	
4.11	The solution provides ability to link a specific article as having been used to resolve a request	
4.12	The solution provides ability to require an agent to link to a knowledge article based on request type or for specific agents	

4.13	The solution provides ability to search based on a knowledge article linked to a service request (e.g., constituent, date, request type)	
4.14	The solution provides ability to display top issues based on historical usage, ranked according to the most viewed	
4.15	The solution provides ability to update the list of top issues on a periodic basis (hourly, weekly, monthly, etc.)	
4.16	The solution provides the ability to purge time sensitive events and to optionally set expiration dates for knowledge articles	
4.17	The solution allows an administrator to update the database and modify workflow options	
4.18	The solution provides workflow to enable oversight of knowledge creation and publication so that knowledge creation can be decentralized but publication to internal or external users can be controlled centrally	
4.19	The solution provides pre-formatted templates for creating knowledge articles and FAQ's	
4.20	The solution provides ability to customize templates for creating knowledge articles and FAQ's	
4.21	The solution provides the ability to establish quality assurance workflow where appropriate so that content for knowledge base or FAQ's can be approved by multiple parties before being published	
4.22	The solution provides audit trail to track changes to knowledge base, recording user and date/time of change	
4.23	The solution provides ability for internal users to subscribe to receive notification of changes to the knowledge base or FAQs, based on subject/section	
4.24	The solution provides ability for knowledge base administrator to manually or automatically send notification of changes to the knowledge base or FAQs to internal users, based on subject/section	
4.25	The solution provides ability to report on usage including number of hits to FAQs and knowledge base articles and popular search criteria	



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Reference Number	Reporting & Analytics	Type: F , CU, TP SR, CR, N
	<b>Reporting and Query Capability</b>	
5.01	The solution provides ability to generate reports based on a set of key performance indicators as designated by City of Pittsburgh.	
5.02	The solution provides a set of standard reports that will provide statistical reporting, including but not limited to:	
5.03	Open service requests	
5.04	Closed service requests	
5.05	Past due service requests	
5.06	Service requests related to an address, location or intersection	
5.07	Service requests that have been escalated	
5.08	Service requests that are classified as high priority/urgent	
5.09	The solution provides ability for all reports to be date sensitive, including the ability to print for prior year's data, fiscal year or calendar year	
5.10	The solution provides ability for reports to be run against both current and archived data	
5.11	The solution provides backlog, service activity, and closure rate statistics for all work order activities	
5.12	The solution provides ability to report on quality measures such as number of ticket reassignments and quality of ticket entry and updates	
5.13	The solution provides ability to generate variance analysis reports comparing the actual time to complete to the estimate provided to the constituent	

5.14	The solution provides ability to generate "hot-spot" reporting for geographic areas in pre-defined zones (e.g., zip code, census tract, etc.) or user-defined areas	
5.15	The solution provides number of inquiries per division/department	
5.16	The solution provides reporting on customer satisfaction	
5.17	The solution provides ability to print copies of records, standardized forms, emails, and letters	
5.18	The solution allows reports to be viewable on the screen, in hard-copy format, or available over the web (if security has been allowed to do this for this report)	
5.19	The solution allows report results to be viewed in graphical format	
5.20	The solution allows report results to be viewed on a map	
5.21	The solution allows user friendly ad hoc query capabilities that do not require a user to understand backend database table structure	
5.22	The solution provides ability to create calculated fields	
5.23	The solution allows multiple users to develop and run queries simultaneously	
5.24	The solution allows query selection criteria to be named and saved for future use	
5.25	The solution allows newly defined reports to be added to the product's menus	
5.26	The solution allows for scheduling of pre-defined reports that can be waiting for the staff or pushed to them via email on demand, monthly, weekly, etc.	
5.27	The solution provides wizards to help guide the report writing process	
5.28	The solution provides that the report writer contain an author log, users, and date of most recent update	
5.29	The solution provides ability to utilize pivot tables in the reports	
5.30	The solution provides the ability to flag reports or certain elements of the report as confidential and set permissions for access to reports	
5.31	The solution provides ability to filter reports by department and for department to secure access to departmental reports	
5.32	The solution provides report writer capabilities for the development of custom reports (e.g. Crystal Reports)	
5.33	The solution provides the ability to export report data into other applications and formats (e.g. PowerPoint, Excel, Adobe, comma delimited, SQL, etc.)	
5.34	The solution provides that report writer allow direct export of a report or attachment to email	
5.35	The solution provides ability to print labels, including mailing labels for constituent related mailings	
5.36	The solution provides ability to generate letters with appropriate formatting for mailing or sending via email	
5.37	The solution provides ability to record when and which types of form letters have been sent	
5.38	The solution provides ability to store copies of correspondence sent in an electronic/digital format	
	<b>Advanced Analytics and Dashboard Capability</b>	

5.39	The solution provides dashboard capabilities that will display reporting information based on user's defined role within the CRM system	
5.40	The solution provides ability to customize dashboard information based on user's desired level of information	
5.41	The solution provides real-time analytics to capture key reporting and metrics	
5.42	The solution provides the ability to assign and/or link management summary reports for comparison over time and benchmarking against other municipalities	
5.43	The solution provides ability to generate reports based on constituent surveys	
5.44	The solution provides ability to conduct trending analysis	
5.45	The solution provides ability to search and report on data associated with service requests such as agent, constituent contact information, address, FAQ article, special event, weather issue and/or request type	




