ABRM DAILY REVIEW

USER GUIDE

August 5, 2015

Office of Management &
Enterprise Services

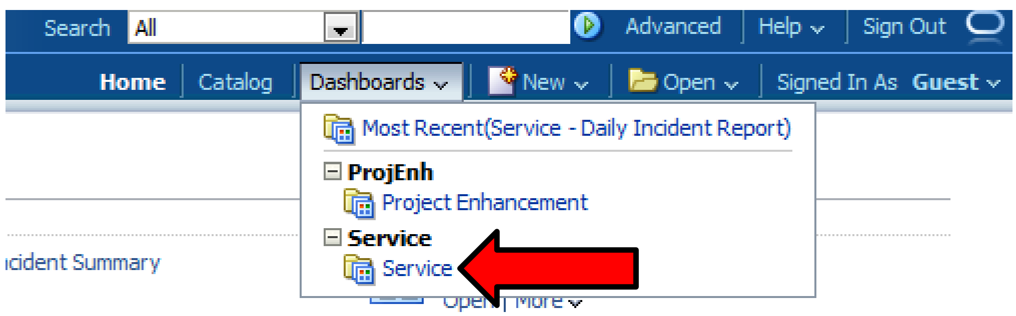
Information Services

OFFICE OF MANAGEMENT
& ENTERPRISE SERVICES

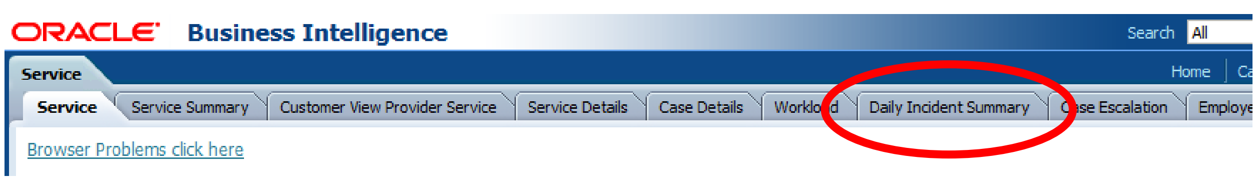
Welcome to the ABRM Daily Review User Guide. The purpose of this guide is to walk each Agency Business Relationship Manager (ABRM) through the daily process of monitoring the cases for the agency they support. The instructions detailed in this user guide should be followed at the beginning of each day and periodically throughout the day.

INCIDENT LEVEL 1 AND 2 CASES

1. Using Internet Explorer (not Firefox), login to Oracle's Business Intelligence system.
2. From the Business Intelligence home screen, click the **Dashboards** tab and then click **Service**.

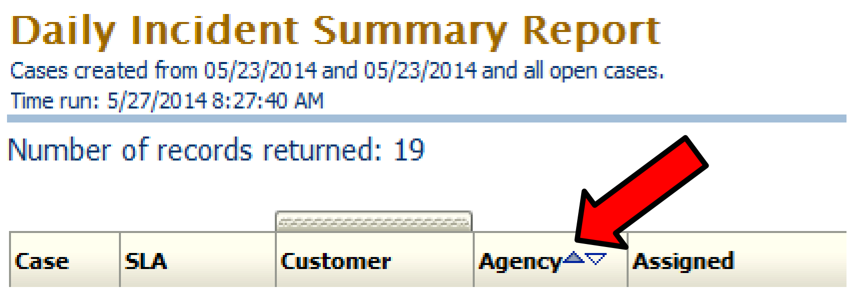


3. From the Service screen, click the **Daily Incident Summary** tab.

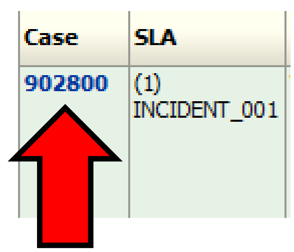


4. The Daily Incident Summary screen will find every Incident Level 1 or 2 Case for any given period of time. Enter the date range to include the time since you last updated your Incident Level 1 and 2 Cases. Once you have entered a date in each of the "Create Date From" and "Create Date To" fields, click **Apply**.

5. When the search results pull up on your screen, hover your mouse over the **Agency** cell until the sort arrows appear. Click the **Sort Ascending** button to put the cases in alphabetical order by agency name.

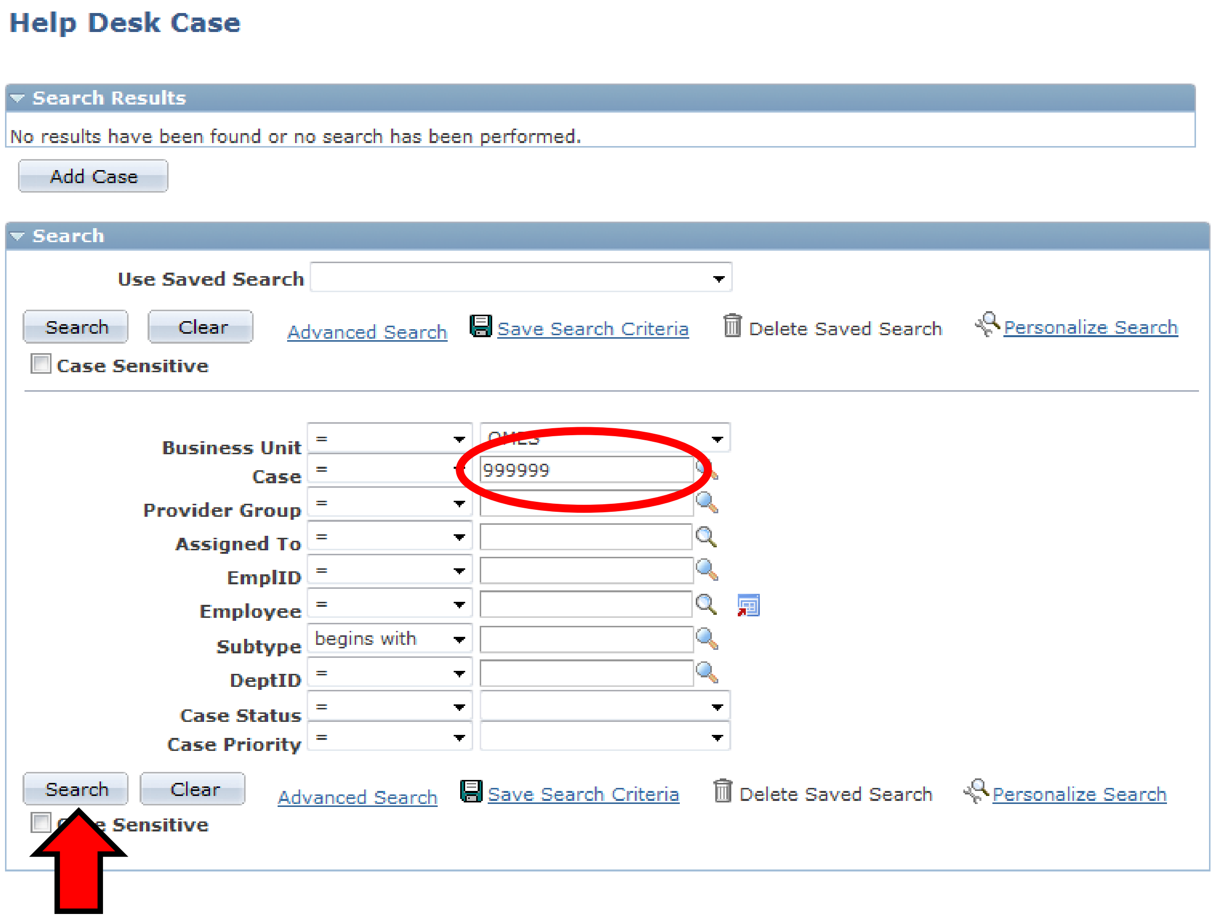


6. When the cases are in order by agency name, you can scroll down through the list to locate the Incident Level 1 and 2 Cases for your agency. You can look at the case history by clicking the Case # under the **Case** column.



7. You will also need to add yourself as an interested party to each Incident Level 1 or 2 Case. To do this, open CRM in another window (CRM should have opened in another window before you opened Business Intelligence). Click **Helpdesk** and then **Search Cases**.

8. Enter the case number for a case you want to add yourself as an Interested Party to in the **Case** field and click **Search**.



9. Click the **Interested Parties** tab.

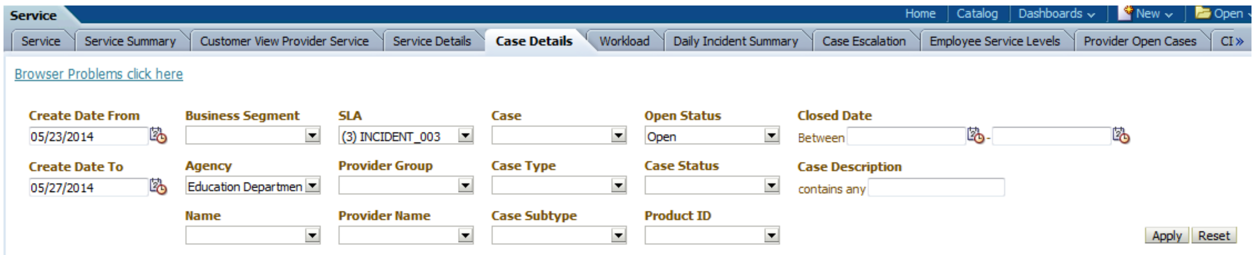
10. Enter your name in the Interested Parties field and select a Reason. Then click **Add Interested Parties**.

11. Repeat this process to add yourself as an Interested Party to each Incident Level 1 or 2 Case.

INCIDENT LEVEL 3 CASES

1. From Oracle's Business Intelligence screen, click the **Case Details** tab.

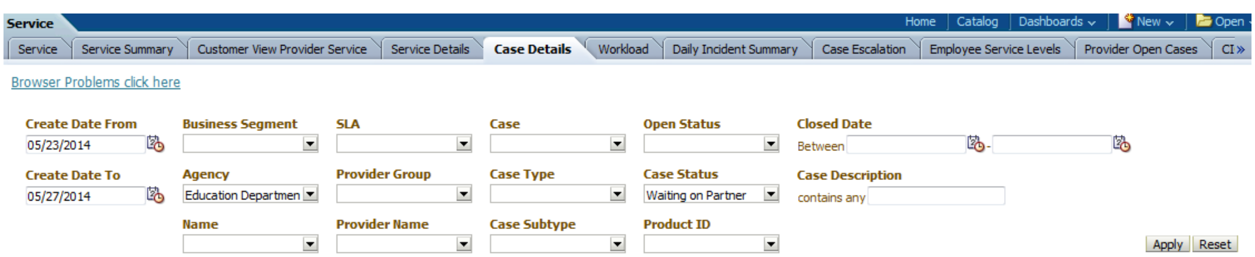
2. Enter the date range to include any time since you last updated your Incident Level 3 Cases. Enter the name of your **Agency**. In the **SLA** dropdown, select **(3) Incident_003**. Select the Open Status of **Open**. Once you have this search criteria entered, click the **Apply** button.



3. Identify any new Incident Level 3 Cases since you last ran the query. Review them to determine if there are any cases that need to be elevated. To elevate a case, follow the Escalation and Elevation Operating Procedures. For any cases that have been elevated, add yourself as an Interested Party.

WAITING ON PARTNER CASES

1. Return to the **Case Details** tab in Oracle's Business Intelligence. Enter the date range to include any time since you last updated your Waiting on Partner Cases. Enter your **Agency** name, the Open Status of **Open**, and the Case Status of **Waiting on Partner**. Then click the **Apply** button.



2. Review your agency's Waiting on Partner cases to determine if you can answer any of the questions the technicians are waiting for the customer on.

OTHER UPDATES

1. You should check your voice mail throughout the day to check for customer calls.
2. You should also check your email to determine if there are issues you need to elevate from customers.