Dispatcher

USER GUIDE

May 4, 2016

Office of Management &
Enterprise Services

Information Services

OMES
OFFICE OF MANAGEMENT
& ENTERPRISE SERVICES

This purpose of this user guide is to walk the employee serving in the dispatcher role through the steps of pre-assignment case analysis and case assignment.

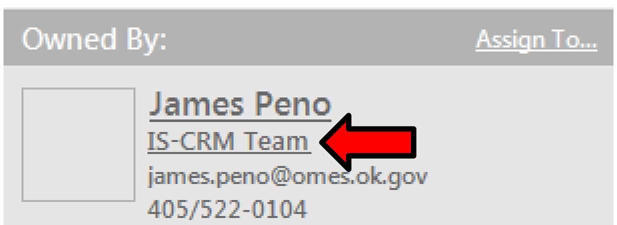
1. Login to CRM and access your service team's unassigned cases from the My Team page.
2. Determine if the unassigned case is an incident or a request by looking at the **Type** column. If it is an ***incident***, continue to the next section titled, "INCIDENT PRE-ASSIGNMENT ANALYSIS". For ***requests***, skip ahead to the section titled, "SERVICE REQUEST PRE-ASSIGNMENT ANALYSIS".

INCIDENT PRE-ASSIGNMENT ANALYSIS

1. Once you have determined the unassigned case is an incident, you need to determine if we support the agency and if we provide the requested service. Refer to your team's Supported Agencies list.
   a. If we do not provide the requested service, note the case and send it back to the Service Desk. Email the Service Desk Leads at ServiceDeskLeads@omes.ok.gov.

Note: To add notes to the case, open the case and click the **Journals** tab. Then click the **New Journal - Note** button and enter the notes into the text field. Choose your visibility and click the **Save** button at the top of the page when finished.

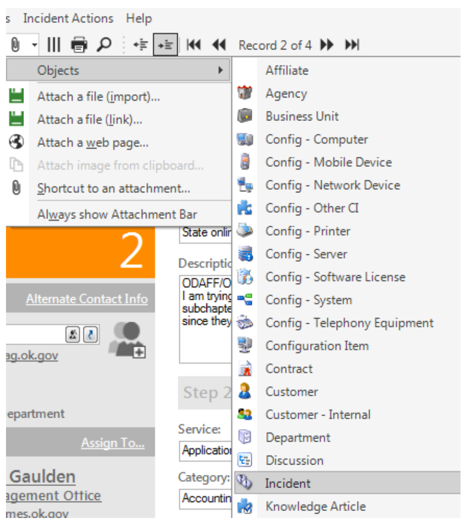
Note: To reassign the case to the Service Desk, on the case screen, click the name of your service team in the "Owned By" section. Select **IS-Service Desk** from the dropdown and then click the **Save** button at the top of the screen.



2. If we do provide the requested service, use the Service Level Agreement (SLA) Chart to determine if the priority matches the actual work needed. If they do not match, notify your supervisor to determine if the priority needs to be changed.
3. The SLA section of the case screen shows the "Resolve By" date.

4. If the customer is a VIP, the VIP icon will display in the Requestor section of the case. The "Resolve By" date and whether or not the customer is a VIP are used to prioritize cases during the assignment process.

5. Determine if there are multiple groups or problems on the one case. If there are, note the case to have it separated, return it to Service Desk Unassigned and email the Service Desk Leads at ServiceDeskLeads@omes.ok.gov.
6. Determine if there are multiple cases from one person on the same subject. If there are, relate the cases by clicking the **Paper Clip** dropdown at the top of the screen and selecting **Objects** and then **Incident** from the dropdown. After relating the cases, resolve the duplicates with an explanation of why they are being resolved.



7. Determine if there are multiple cases from many people with the same problem. If you identify multiple cases from different people each experiencing the same problem, notify your supervisor. There may be a trend or system problem in need of having a Parent Case created.
8. When you have finished the pre-assignment analysis, move on to the section titled, "CASE ASSIGNMENT".

SERVICE REQUEST PRE-ASSIGNMENT ANALYSIS

1. Once you have determined the unassigned case is a request, you need to determine if the request is for hardware or software.
2. For hardware requests, assign the case to IS-Asset Team for a quote or available inventory, with a note explaining the reassignment.
3. For software requests, determine if the software is approved to install by referring to the Standard Desktop Software List. If the software is not approved, send the case back to the Service Desk requesting a Software Request Form by completed. Also, email the Service Desk Leads at ServiceDeskLeads@omes.ok.gov for training purposes.
4. For approved software, determine if licensing is available. The IT Inventory Control Manager should have this information if you are unsure. If licensing is not available, assign the case to an IT Inventory Control Manager for a quote.
5. For approved software requests with licensing available and for all other requests, you are ready to move on to the next section titled, "CASE ASSIGNMENT".

CASE ASSIGNMENT

1. Determine if the case can be worked using remote access tools. If it cannot, determine if a technician is on-site, if a regional technician is available or if a dispatch team needs to be engaged. When that determination is made, the case can be assigned accordingly.
2. If the case can be worked using remote access tools, determine if a specific technician was requested and if specific technical skills are required. If specific skills are required, consult the Technical Skills Reference Document to identify the technicians that are capable of performing the work. Determine the technician's workload and capacity and if they are able to work the case, assign the ticket to them.
3. If no specific technician was requested and no specific skills are required, check related cases and the availability of technicians. Look at the number of cases already assigned to a technician and the amount of work to be done on the unassigned case to identify an available technician.
4. Assign the case.