Technician Workload Management

USER GUIDE

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Office of Management &
Enterprise Services

Information Services

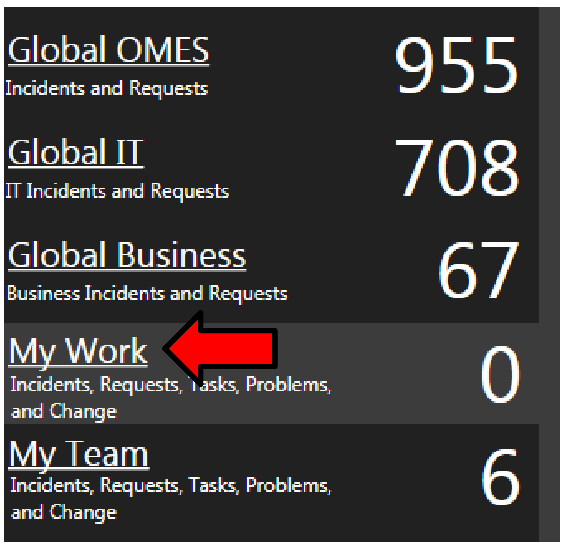
The purpose of this guide is to walk OMES IS technicians through the process of managing their workload through checking their cases, staying current on assignments and updating their cases.

UPON ARRIVAL TO WORK EACH DAY

The following steps should be completed by technicians upon arrival to work each day.

Checking Your Cases in CRM

1. Check the unresolved cases and tasks that are assigned to you by logging in to CRM and clicking **My Work** on the left side of the screen. The My Work dashboard displays any unresolved incidents, service requests, tasks and problem cases assigned to you.



After Checking Your Cases

1. After you check your cases in CRM, you should check your voicemail for callbacks from customers.
2. Next, you need to prioritize your cases based on Service Level Agreement (SLA), VIP customers, SLA expiration, location, expected date and available transportation. Refer to the **05.1.6 Service Level Agreement (SLA) Standard** for further information.
3. Login to your Instant Messenger.
4. Check the Hot Topics and White Board for news, if they exist for your service area.

STAYING CURRENT ON ASSIGNMENTS THROUGHOUT THE DAY

1. Check your My Work dashboard again in CRM to find any new assignments.
2. Be sure to check your Instant Messenger throughout the day for updates.
3. Call the Dispatcher when working away from the office. Other cases may have come in that can be worked before returning to the office.

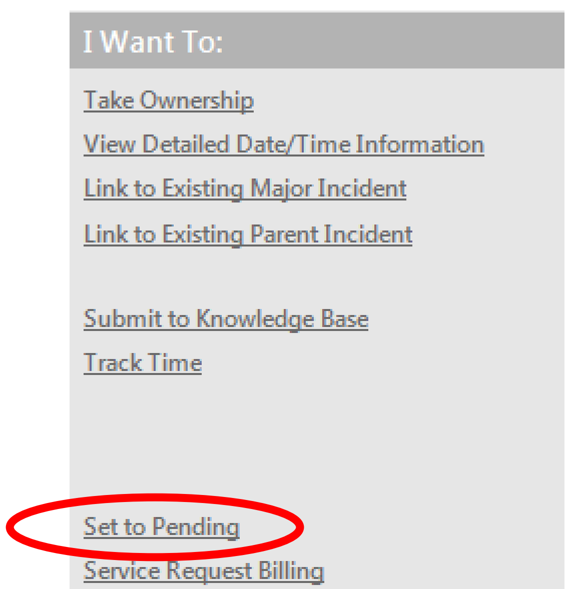
CASE UPDATES

It is very important to make sure you keep the notes on each of your cases updated.

Pending Cases

If you are unable to work on a case because you are waiting for the customer to respond to either an email or a phone call, change the status to **Pending** and add a Review Date and a note to the case explaining why.

1. To put the case in Pending status, go to the case and click **Set to Pending** in the "I Want To" section.



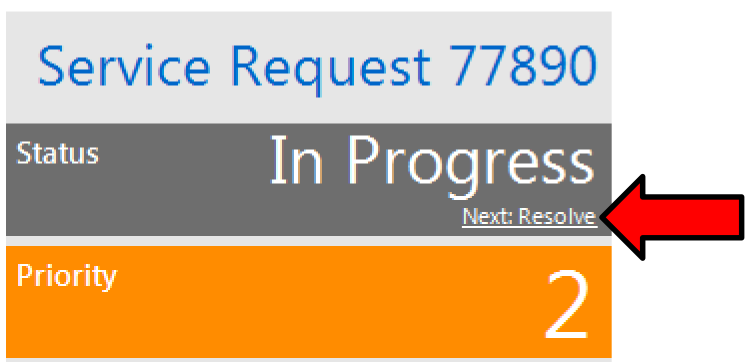
2. After clicking the **Set to Pending** button, you will receive three prompts asking for a reason for putting in Pending status, a Review Date for when the Pending status should end and any further details.
3. Follow up every 2 days unless a date is specified in the case.
4. The Service Desk sends emails to customers at 3 and 7 days asking if the customer needs additional assistance.
5. At 10 days, the Service Desk sends a resolved case email to the customer.

Working Cases

1. Once you begin working on a case, change the Case Status to **In Progress**. This is done at the top left of the screen once the case has been opened.
2. Update the case notes daily.
3. When talking to the customer, have the case open and make notes.

Resolved Cases

1. As soon as cases are resolved, update the resolution by clicking the **Next: Resolve** link in the Status box. A window will appear to enter what was done to resolve the case minus any confidential information.



2. It is important to resolve your case quickly to meet the Service Level Agreement (SLA). If you are off-site, call the Service Desk or your Dispatcher and have them close the case for you.

Out-of-Office Case Handling

1. When you are going on expected leave, notify your Dispatcher of any unresolved cases that may need to be reassigned.
2. When you need to take unexpected time off, notify your Supervisor using standard protocol as defined by your Supervisor. You should also inform your Supervisor of any pertinent appointment information and case updates.