

A p p e n d i x 0 3

Work Queue Procedures

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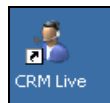
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The Work Queue

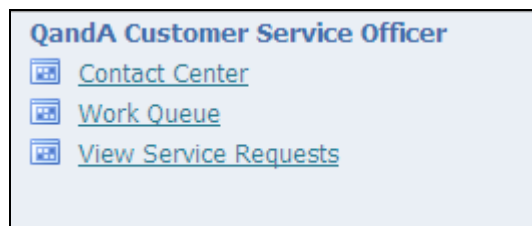
The Work Queue allows you to view all Service Requests (SRs) which have been assigned to you/your office and which are open or incomplete. It can display service requests by user or group.

Accessing the Work Queue

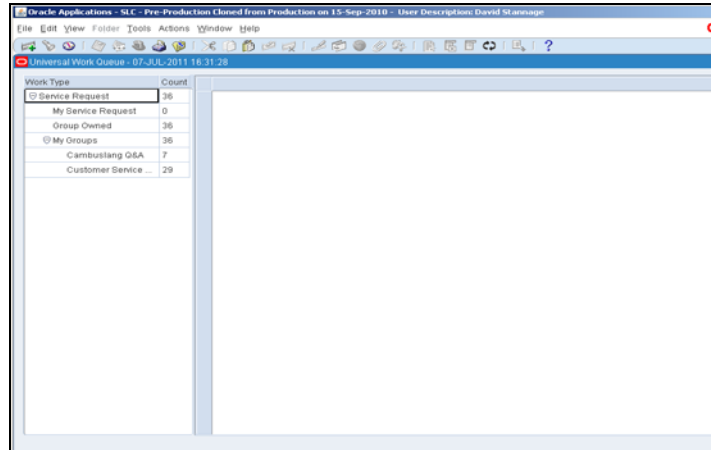
1. To access the work queue, you must first log on to the CRM system
2. Double click on the CRM icon on the desktop and when prompted enter your user name and password
3. The **Navigator** screen is displayed, select your responsibility



4. Using the left mouse button double click on Work Queue



5. This will open the work queue for you to view all open service requests



6. On the left hand side is a list of all the work queues you have access to:

My Service Request

shows all the open service requests of which you are the current user which are open/incomplete

Group Owned

shows all the service requests related to any offices which you may be a member of

My Groups

will contain a list of all the groups/offices you may be part of

Displaying your own Work Queue

- Once you have accessed the Work Queue use the left mouse button click once on the + sign next to My Groups.

Request	Creation Date	User	Modified Date	Respond By	Target Date
3863119	28-JUN-2010	Neill, Kerry Ann	02-DEC-2010		13-SEP-2010
3863136	28-JUN-2010	Neill, Kerry Ann	13-SEP-2010		13-SEP-2010
3860577	01-JUL-2010	Neill, Kerry Ann	02-DEC-2010		13-SEP-2010
3094170	22-JUL-2010	Neill, Kerry Ann	02-DEC-2010		13-SEP-2010
3950933	06-SEP-2010	Harper, Caroline	02-DEC-2010		13-SEP-2010
3952060	07-SEP-2010	Martin, Angela	02-DEC-2010		06-OCT-2010
3952290	07-SEP-2010	Neill, Kerry Ann	02-DEC-2010		14-SEP-2010
3960514	13-SEP-2010	McGraw, Mary	13-SEP-2010		15-SEP-2010
3960004	04-OCT-2010	Brown, Margaret	07-OCT-2010		
3960806	04-OCT-2010	Graham, Sandra	04-OCT-2010		05-OCT-2010
3960808	04-OCT-2010	Graham, Sandra	04-OCT-2010		05-OCT-2010
3960810	04-OCT-2010	Graham, Sandra	04-OCT-2010		06-OCT-2010
3961190	18-OCT-2010	Graham, Sandra	18-OCT-2010		
3961194	18-OCT-2010	Graham, Sandra	18-OCT-2010		
3961196	18-OCT-2010	Graham, Sandra	18-OCT-2010		
3961200	18-OCT-2010	Graham, Sandra	18-OCT-2010		
3961206	18-OCT-2010	Graham, Sandra	18-OCT-2010		20-OCT-2010
3961210	18-OCT-2010	Graham, Sandra	18-OCT-2010		
3961228	18-OCT-2010	Graham, Sandra	18-OCT-2010		20-OCT-2010
3961230	18-OCT-2010	Graham, Sandra	18-OCT-2010		
3961232	18-OCT-2010	Graham, Sandra	18-OCT-2010		
3961234	18-OCT-2010	Graham, Sandra	18-OCT-2010		
3961236	18-OCT-2010	Graham, Sandra	18-OCT-2010		

Any groups which you are a member of are now displayed.

- Using the left mouse button click once on the Office you wish to view
- Each time you enter the relevant work queue click on Tools at the top of the screen then click on Refresh All Work
- There are various pieces of information on display within the Work Queue

The system should be refreshed so that the most up to date items are displayed.

Request	Creation Date	User	Modified Date	Respond By	Target Date	Status
3960808	04-OCT-2010	Graham, Sandra	04-OCT-2010	05-OCT-2010	05-OCT-2010	Open

Request shows the service request number (SR no)
Creation Date is the date the service request was created

User is the name of the person currently dealing with the service request

Modified Date is the date any notes were added to the service request

Respond By is the initial response date for the service request

Target Date is the resolution date for the service request

Status is the current status of the service request.

5. Using the scrollbar at the bottom of the screen you can see the rest of the items available

Summary	Type
sri exor 1009/6...	ENT-Street Li...

Summary shows more detail about what the service request is regarding

Type is the service request type as chosen by the person who logged the enquiry

All of the above items can be ordered within the work queue by clicking on the dot to the right of the item you wish to order by. For instance, you can sort items by creation date, target date, user or status.

Reading and Updating a Service Request via the Work Queue

In general, when you are accessing a service request via the work queue in order to update it you may need to do the following:

- **Enter a user name**
Read notes and attributes
- **Enter a note against the Service Request to advise what action you have taken**
- **Change the Status**
- **Change the office**

The instructions below include guidance on how to do these things.

1. To select an entry within the work queue, double click anywhere within it using the left mouse button.
2. The Service Request opens – displaying the Workbench tab. The CSA can now review the information recorded

The screenshot shows the Oracle Applications interface for a Service Request. The window title is 'Oracle Applications - SLC - Pre-Production Closed from Production on 15-Sep-2010 - User Description: David Stansage'. The main window is titled 'Service Request (3978592 - Mice whole house - COUNCIL, sn) - GMT'. The 'Workbench' tab is active, displaying a summary of the service request. The summary includes the problem code, urgency (Medium), error code, and resolution summary. The 'Notes' section shows a log of actions, including 'Incident Address Address : 2, T...' and 'Office SR Logged At * = Custo...'. The 'Solutions' section is also visible at the bottom.

To Read Notes/Attributes

The main part of the screen is called the **Workbench**. This area details all the information about the Service Request.

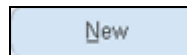
The **Notes** section of the workbench is the most important area to you. Within this area you can find all the details relating to the service request whether they are contained within attributes or within a separate note. Please be aware that as well as receiving first time enquiries you may also receive repeat enquiries. In these instances, it is very important to look at the notes against the Service Request to establish the reason for it being on the Work Queue.

All the **Notes** are listed in order of first → latest. To view a note either hover the mouse arrow over it and the details will appear or click once on it using the left mouse button and the note will appear in the Description box at the bottom right of the workbench.

Each Service Request should have a note starting **Office Service Request Logged At**, this particular note will contain the **Attribute** information which you may need in order to process the request. Attributes have been identified by your Resource.

To Add Notes

1. Click on the **New** button at the bottom right of the screen



1. Click on the **build** button next to type

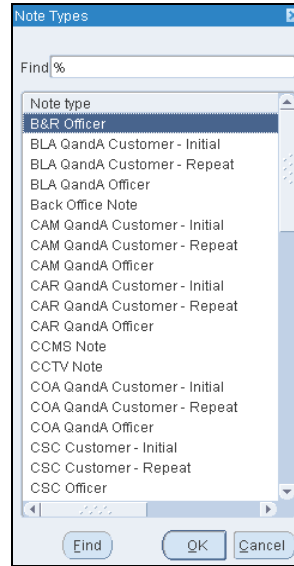


2. Select the relevant note type specific to your office and action taken

The note type you select must always be the relevant note type e.g.:

For Q&A/CSC you would choose Repeat or Officer note

For back office you would choose Back Office Note



The repeat note should be used when a customer returns to the office for further information/follow up and the officer note should be used for any follow up/general actions that you take in relation to an already logged Service Request. Back office users will always use a Back Office note.

3. Enter your note
4. Click the save icon



The note will be entered into the request.

It is important that you add a note to every Service Request to advise of the action you have taken, if the customer contacts either Q&A/CSC for an update this information will be used to find out the last action taken.

To Enter a User Name

1. You can change/add a user while viewing the Service Request
2. Click the cursor into the box next the User field



3. Enter the surname of the person required and press Tab

or

click the Build button,
and search for the
person's surname using
the Find facility



4. Click the Save icon



When you open a Service Request you should enter your name as the user to show that you are in the process of dealing with the request.

To Change the Status of a Service Request

To change the status of a Service Request you must click in the box next to status and enter the status required, or click the build button  which will bring up a list of statuses available, hit the tab key to proceed

To Change the Office the Service Request Relates to

You can change the **office** the Service Request relates to, this will make the Service Request appear in another offices work queue. This is done by clicking the cursor in **Office Asg** and typing in the name of the office you wish to change it to, or by clicking in Office Asg then the build  button which will bring up a list of all offices available.

Any changes which you make to a Service Request must be saved by clicking on the save icon. 