VERINT CLOUD CASE MANAGEMENT PROFESSIONAL
EMPLOYEE DESKTOP QUICK START GUIDE

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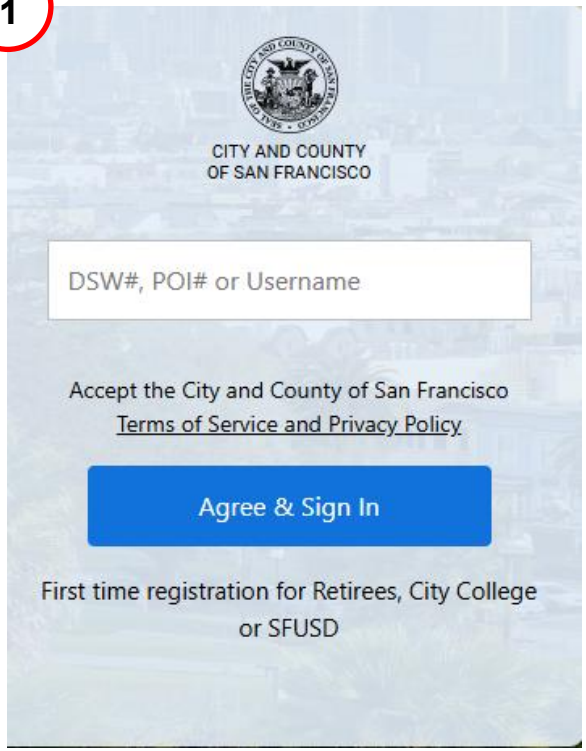
Logging in to the Employee Desktop Application

Access the link to log into the Verint Cloud online portal on the Verint CRM web page: SF.GOV/crm

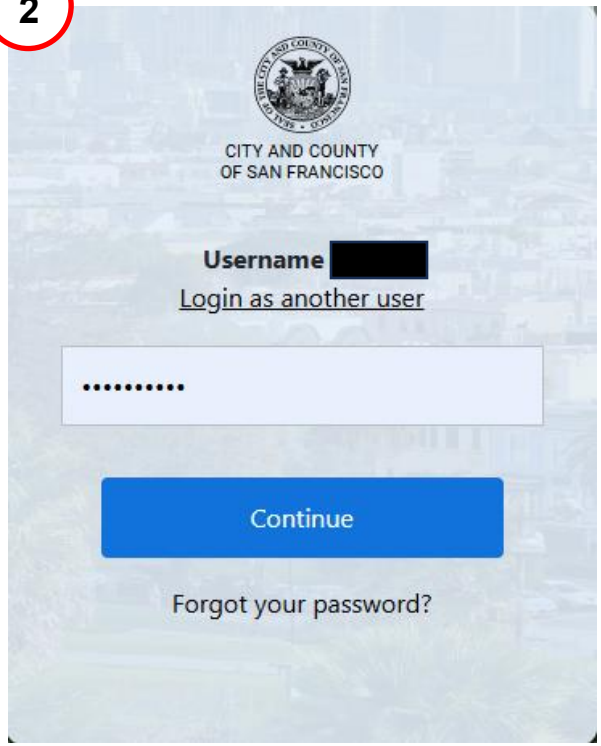
Complete the authentication process:

1. Enter your DSW#, POI# or Username and click on "Agree & Sign In."
2. Enter your password and click on "Continue"; a secure code will be generated by the authenticator application you're using for MFA.
3. Enter the six-digit secure passcode from the app and click on "Verify."

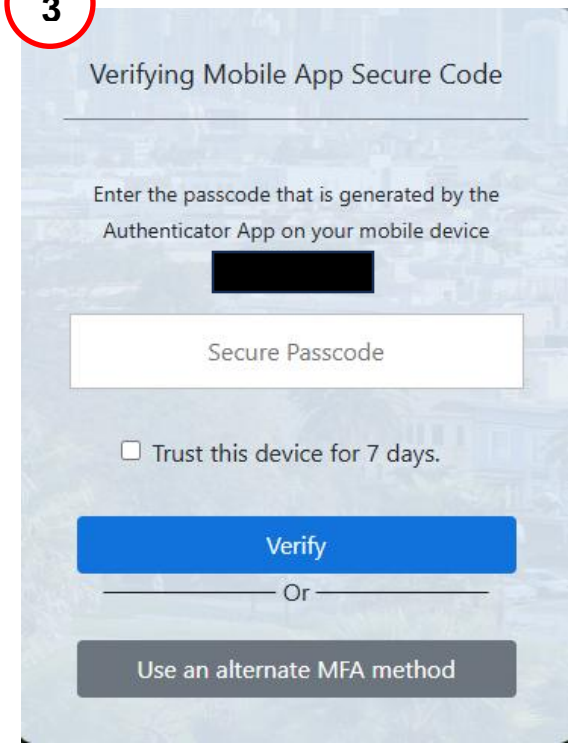
1



2



3



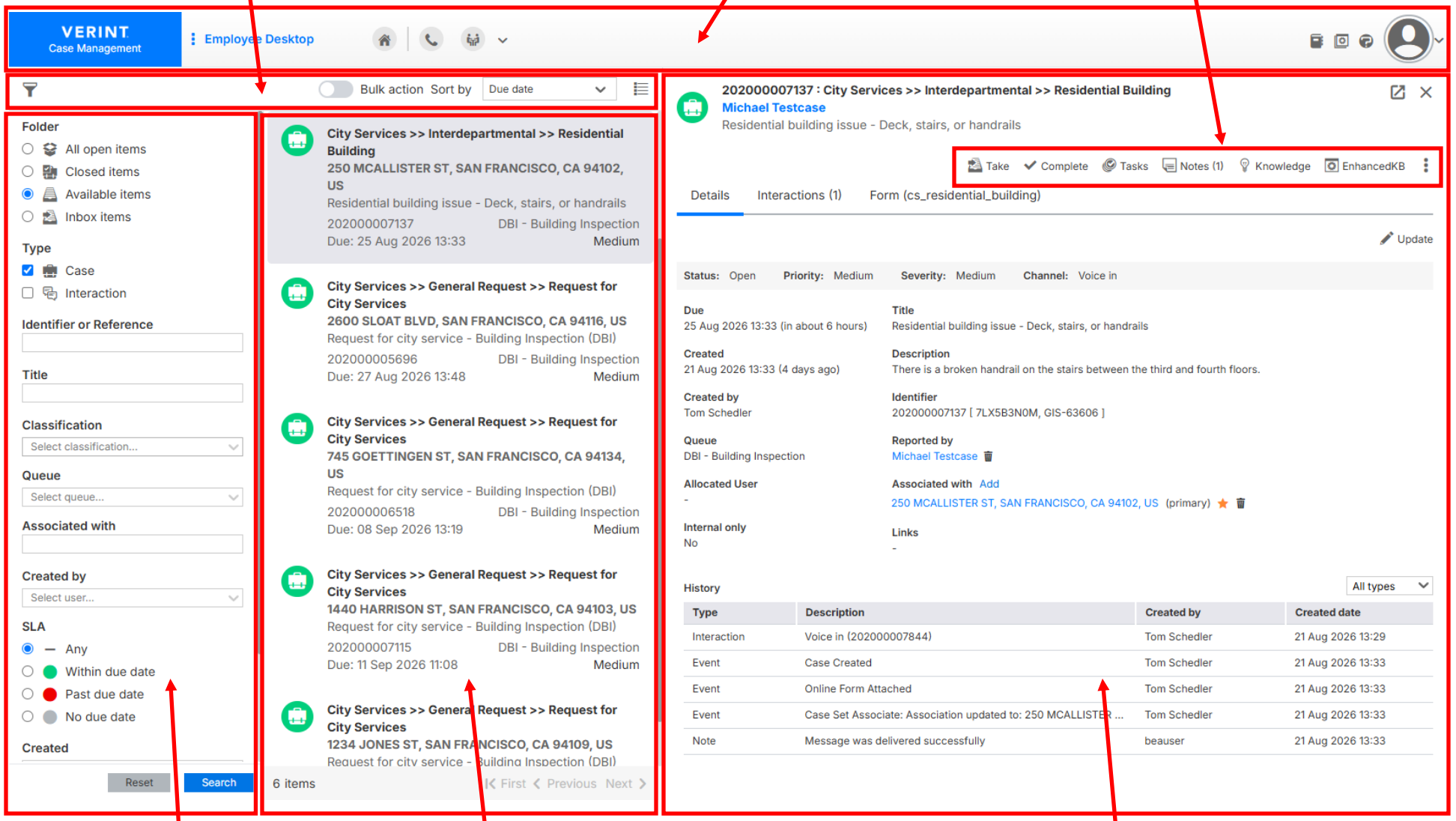
The Verint Cloud Case Management Professional application will open to the Employee Desktop home screen.

Employee Desktop Overview

Tool Bar
Options for sorting, viewing & handling cases

Menu Bar
Displays options based on user configuration

Functions Bar
Case handling functions when a case is selected



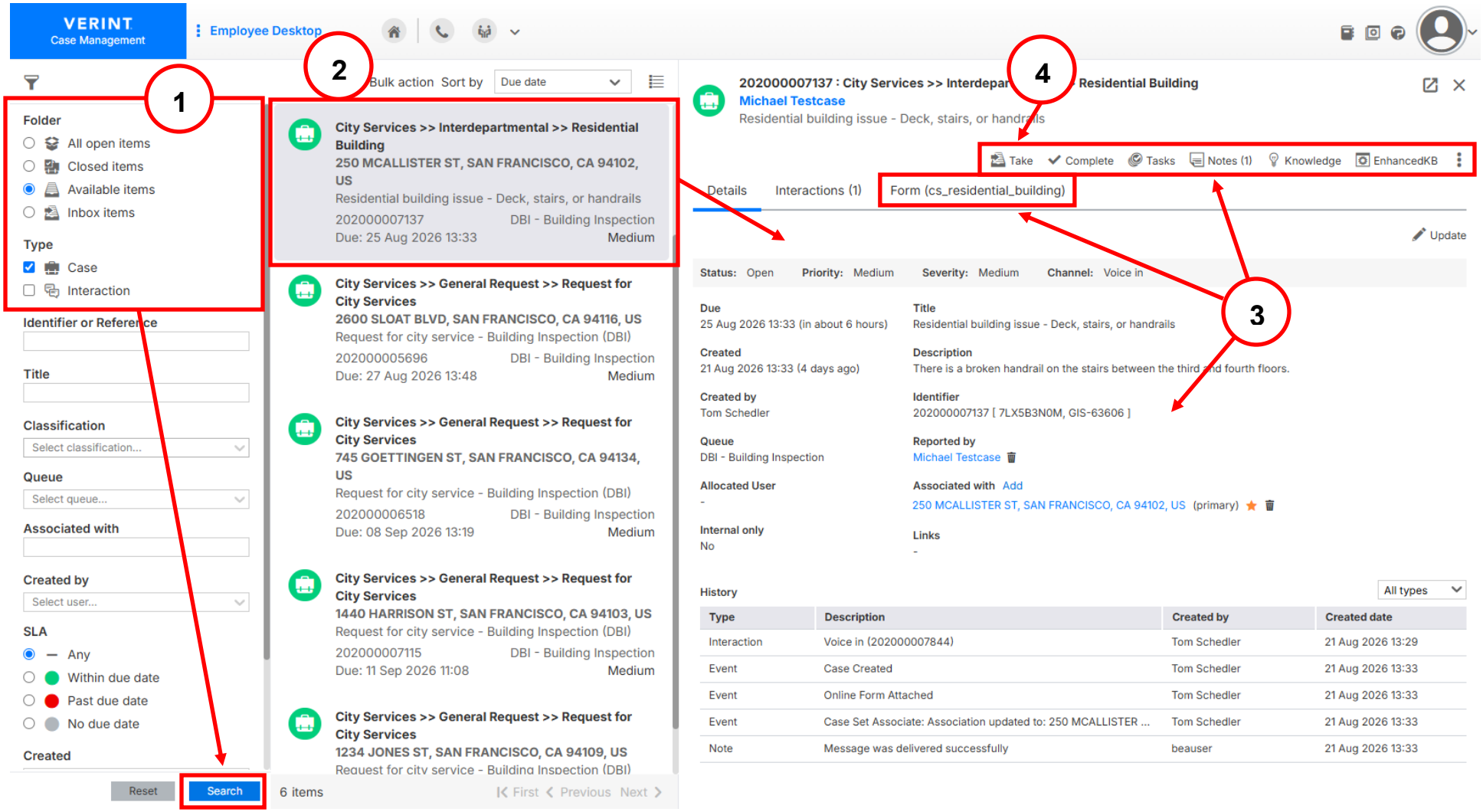
Filter Pane
Filter items using various options; results are displayed in the List

Case & Interaction List Pane
Displays cases & interactions depending on the selected filter; default view is "All open items"

Details Pane
Selecting a case populates this pane with its related details, History, a link to the form, and case-handling Functions Bar

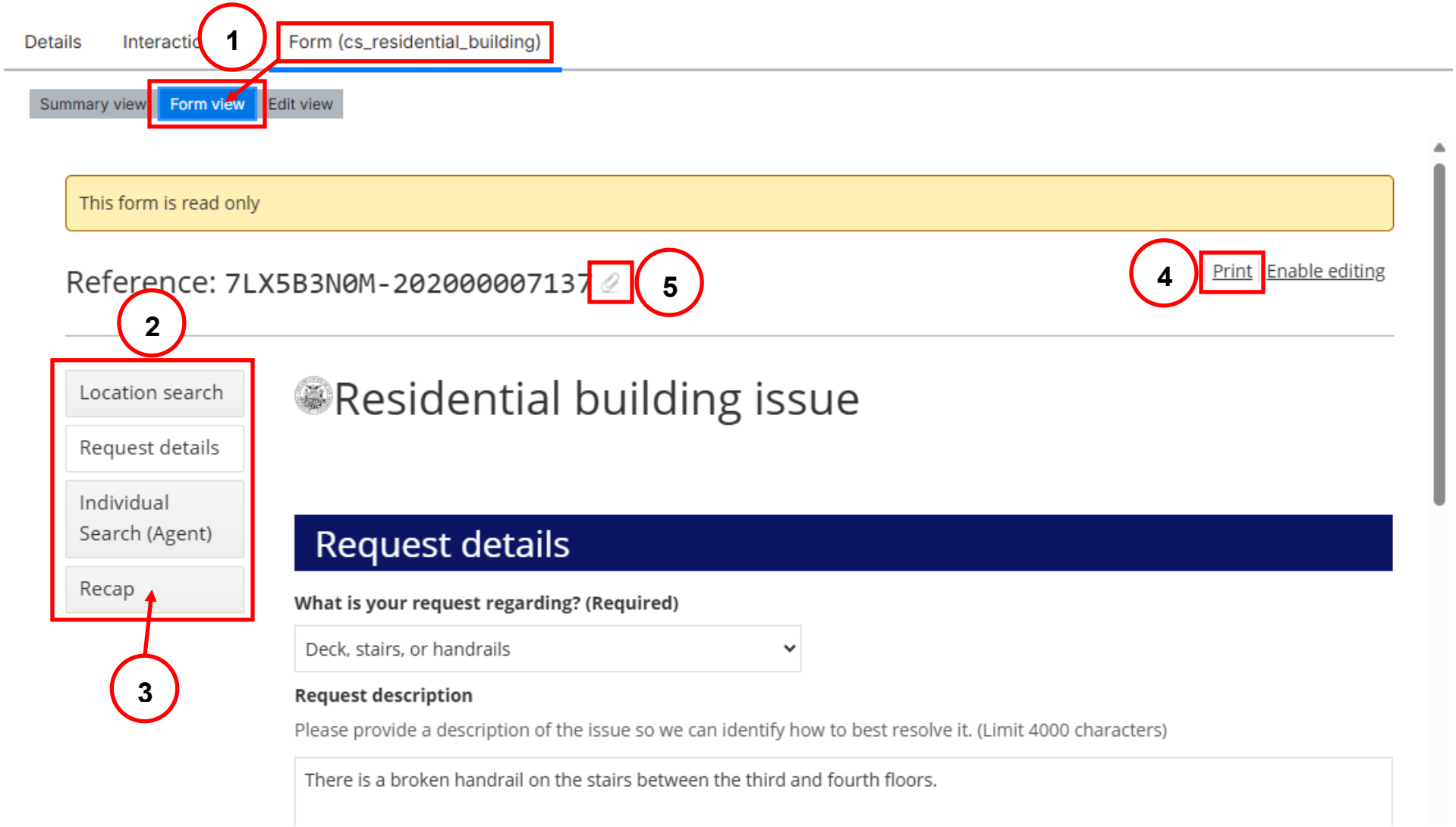
Selecting cases, viewing them, and taking ownership

1. In the **Filter Pane**: under **Folder** select "Available Items"; under **Type** select "Case"; click the "Search" button: this will filter to show all open cases available to take in your assigned queues. NOTE: the "Inbox items" filter shows cases you already have ownership of.
2. Click on a case from the list of available cases to view the case details and work on the case.
3. The **Details Pane** on the right displays the case details, the link to the Form, and the **Functions Bar**.
4. Click the icon  "Take" in the **Functions Bar** to take ownership of the case; the case is now allocated to you.



Viewing the Form

1. In the **Details Pane** click on the "Form" link to launch the form, then click the blue "Form view" button to view the form.
2. You may view the form's "Request Details" (default), as well as "Location Search," "Individual Search (Agent)," and "Recap."
3. The "Recap" page of the form provides more information on the details of the case and is usually best for printing.
4. You may choose to print the pages of the form or save as a PDF.
5. Click on the paperclip icon to view a list of attached files you can select from, including PDF, Excel and Word docs that cannot be accessed anywhere else.

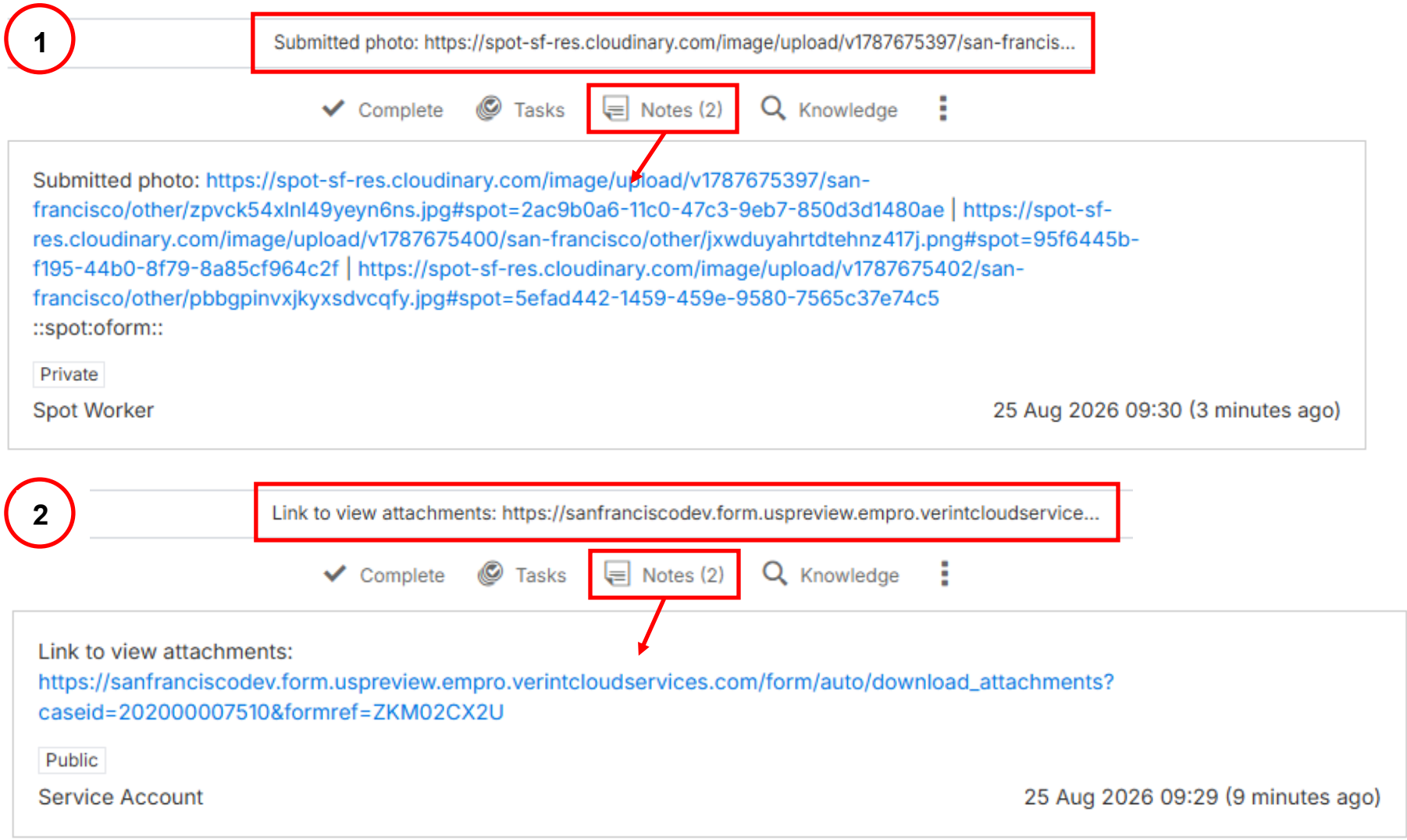


Viewing Attachments

In the **Details Pane's** case Details view, if you see a Note in the **History** section that has…

1. "Submitted photo:" and/or
2. "Link to view attachments:"

…click on the icon "Notes" in the **Functions Bar**: the Notes screen will open and the URL will be a link that opens the file in a new tab.

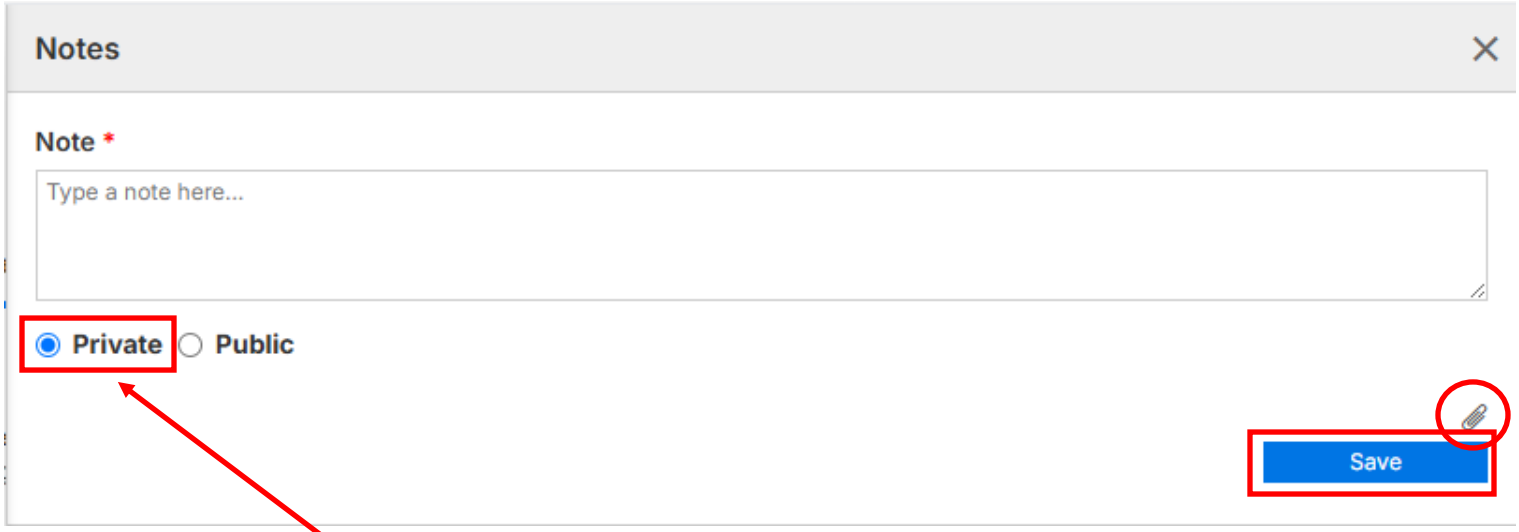


NOTE: Selecting "Notes," and also "Events" (from the "More" menu), on the **Functions Bar** will also allow you to view the entire contents of each note and/or event instead of just the truncated text in the Case Detail's "History" section at the bottom of the pane. This is useful for seeing the description of why a case was updated, reallocated, completed, etc., in addition to viewing attachments.

Add a Note

Case notes are used to describe actions taken, and/or information added, when handling a case and track the progress of the case toward a resolution and completion.

From the **Functions Bar** select the icon  "Notes" and add notes on the current status of the case and the work being done to resolve the case, add an attachment if desired, and save the note:

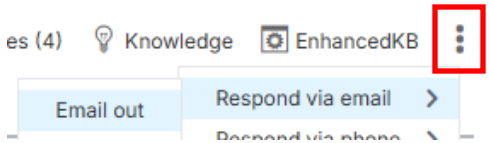


The default setting is "Private," but "Public" may also be selected as needed; "Public" notes will be viewable by the public; "Private" notes will only be viewable internally.

Case notes are especially useful and should be added for a variety of reasons, including…

- If you are unable to complete the case, and it needs to be completed by someone else; this provides them with the details of work that has already been done to avoid duplicating efforts in resolving and completing the case.
- If a case involves multiple steps to resolve it and remains open for a long(er) period; 311 uses case notes to provide status updates to the public when they call in, eliminating the need for 311 to reach out to your department for an update.

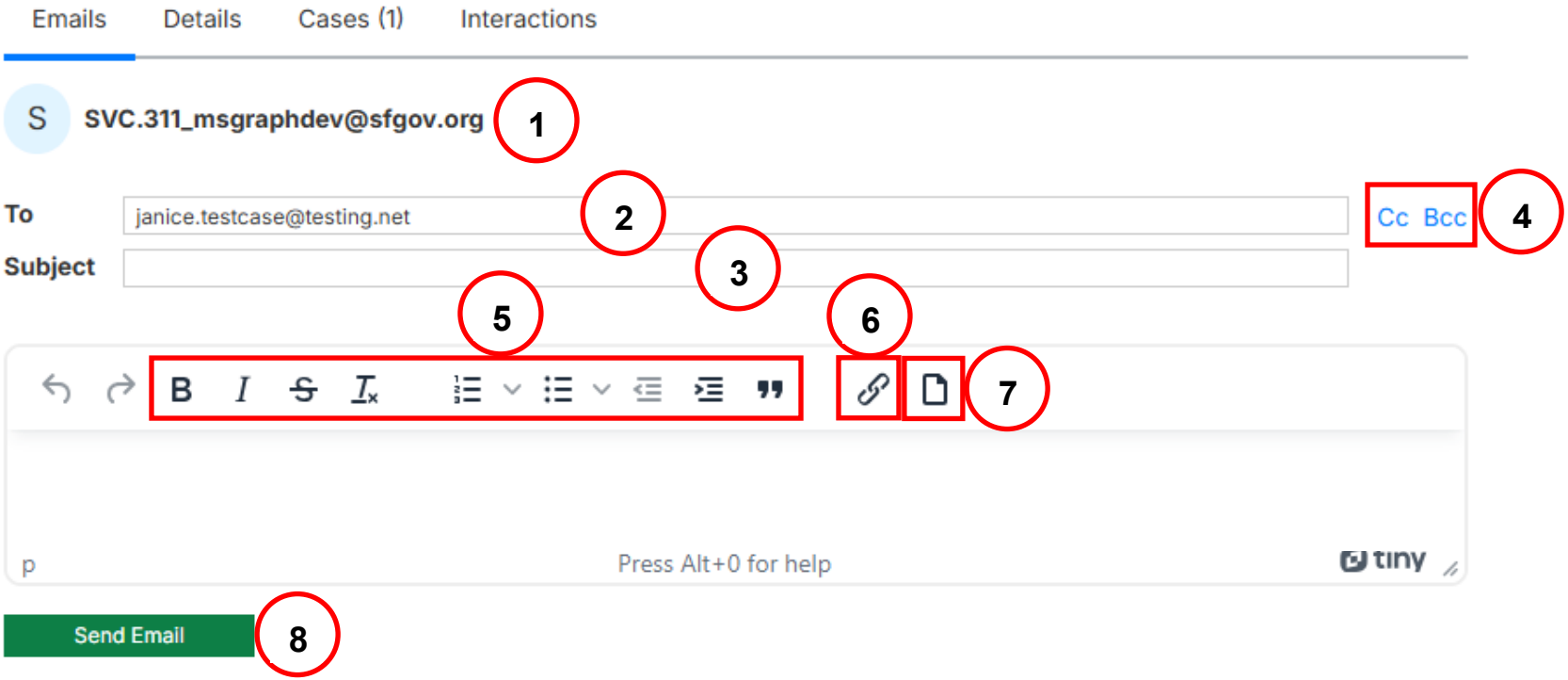
Send an Email

From the **Functions Bar** select the "More" icon, 

then select "Respond via email >> Email out"; outbound emails may be sent to the customer by creating your own blank email, or by utilizing pre-configured email templates:

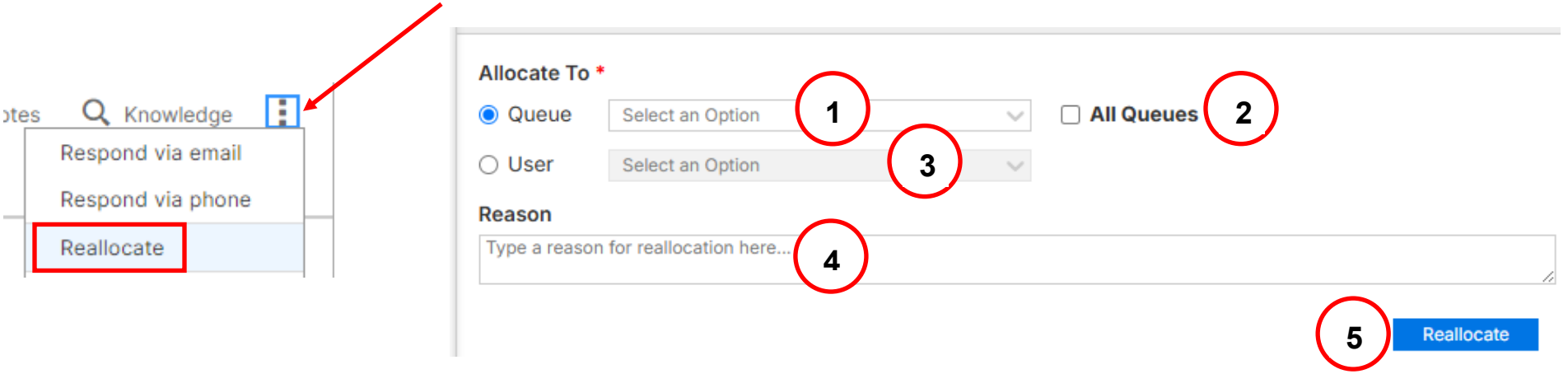
1. **From:** the default email address used by the system for sending emails will be prepopulated.
2. **To:** prepopulated from a customer record if it was included, and/or manual entry.
3. **Subject:** prepopulated when using a template, and/or manual entry.
4. **Cc Bcc:** add more recipients- Carbon copy and/or Blind carbon copy.
5. **Rich text editor:** email body text formatting functions/options.
6. **Add attachments:** attach files to the email.
7. **Apply message template:** select from a list of available templates.
8. **Send Email:** click to send the email to the designated recipient(s).

NOTE: Email templates can be pre-configured and loaded into the application by 311 staff for your use based on your departmental processes; contact us at content.311@sfgov.org if you'd like to discuss this feature.



Reallocate a Case to a different Queue or User

From the **Functions Bar** click the "More" icon and select "Reallocate" from the menu:

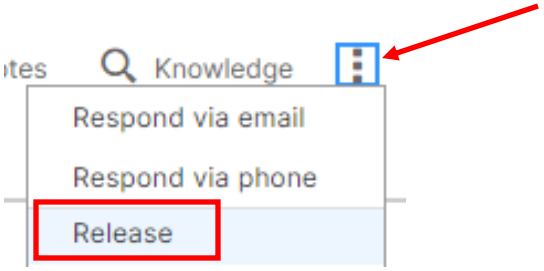


1. **Queue:** the default menu option is a list of pre-selected queues specifically for your departmental use.
2. **All Queues:** checking this box will result in the Queue menu showing all available queues regardless of department.
3. **User:** selecting this option will result in the menu showing all users that are configured to receive reallocated cases.
4. **Reason:** add a note indicating the Reason for the reallocation, especially if the case should not have been allocated to your queue.
5. **Reallocate:** click the button to reallocate the case as determined by the menu selection- to a Queue or a User.

NOTE: if you get a case in your Queue that you don't believe is for your department to handle, please reallocate it back to 311 using the queue **311 - Supervisor**, and one of our Supervisors will handle it from there.

Release a Case that you took ownership of sends it back to the Queue it was selected from and makes it available to other users.

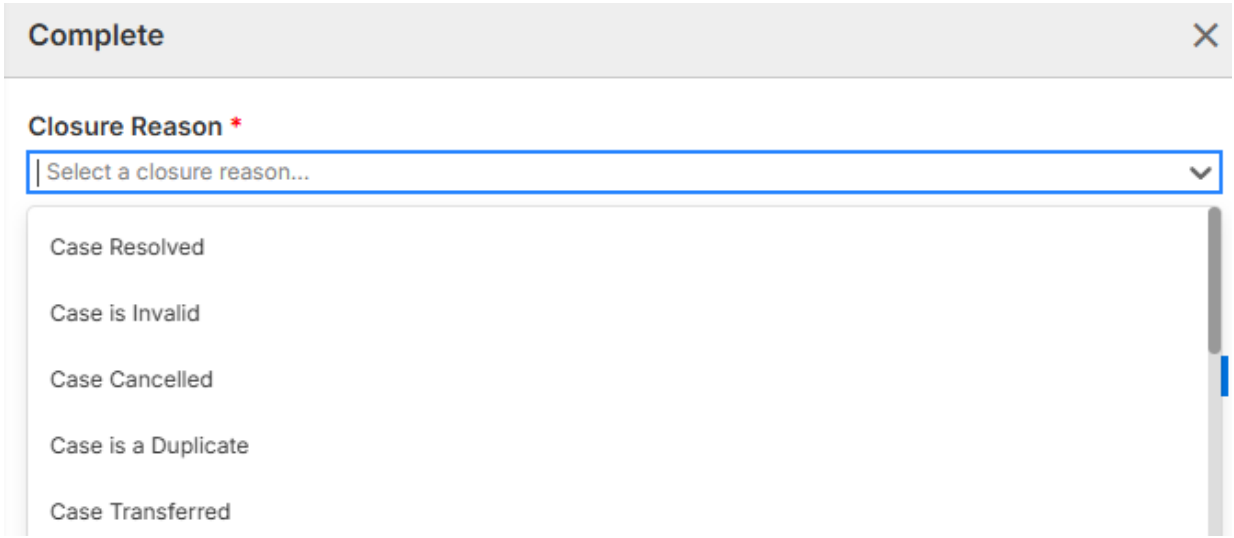
From the **Functions Bar** click the "More" icon and select "Release" from the menu:



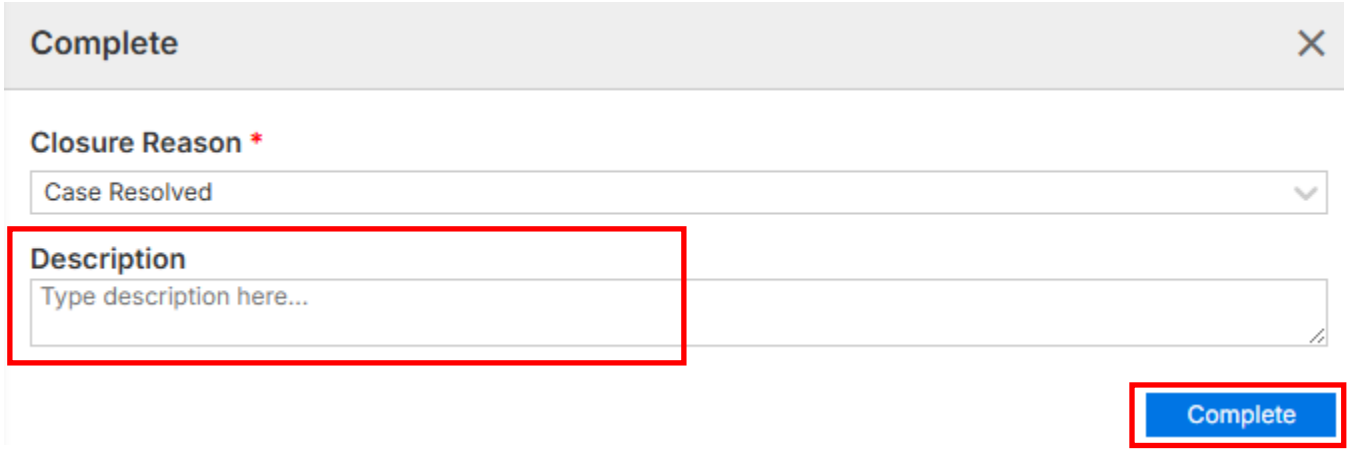
Release a case back to the queue when you are unable to complete it so that another user can take ownership and work on it; ensure that you have added appropriate case notes describing any work that was already completed to avoid duplicating efforts in resolving it.

Complete a Case

Closing a case once the work is completed to resolve the request: in the **Functions Bar** click the icon "Complete" and select an appropriate "Closure Reason" from the menu:



In the "Description" field enter appropriate case completion notes, and click the "Complete" button:



NOTE: case closure notes can be seen by the public when tracking their case(s) so please enter appropriate descriptions & information that complies with the City & County of San Francisco's Sunshine Ordinance, and/or your own department's guidelines.

Advanced Options & Functions

Menu Bar Options

Depending on how the user's permissions are configured, the Menu Bar can contain the following options:

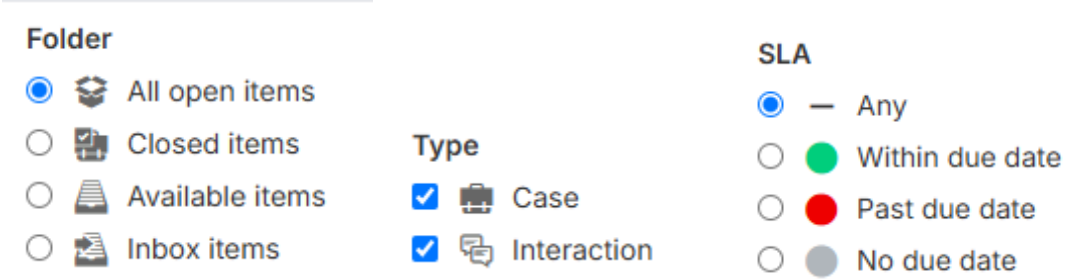


1. Employee Desktop application selection menu

- Allows selection of various applications in the Case Management Professional suite.
- For most users the only application option will be the Employee Desktop.

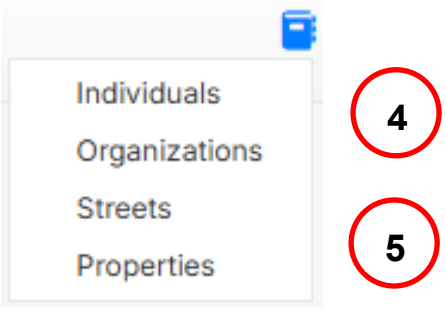
2. Home

- The default case handling view.
- The default filters are "All open items" (Folder), "Case" and "Interaction" (Type), and "Any" (SLA):



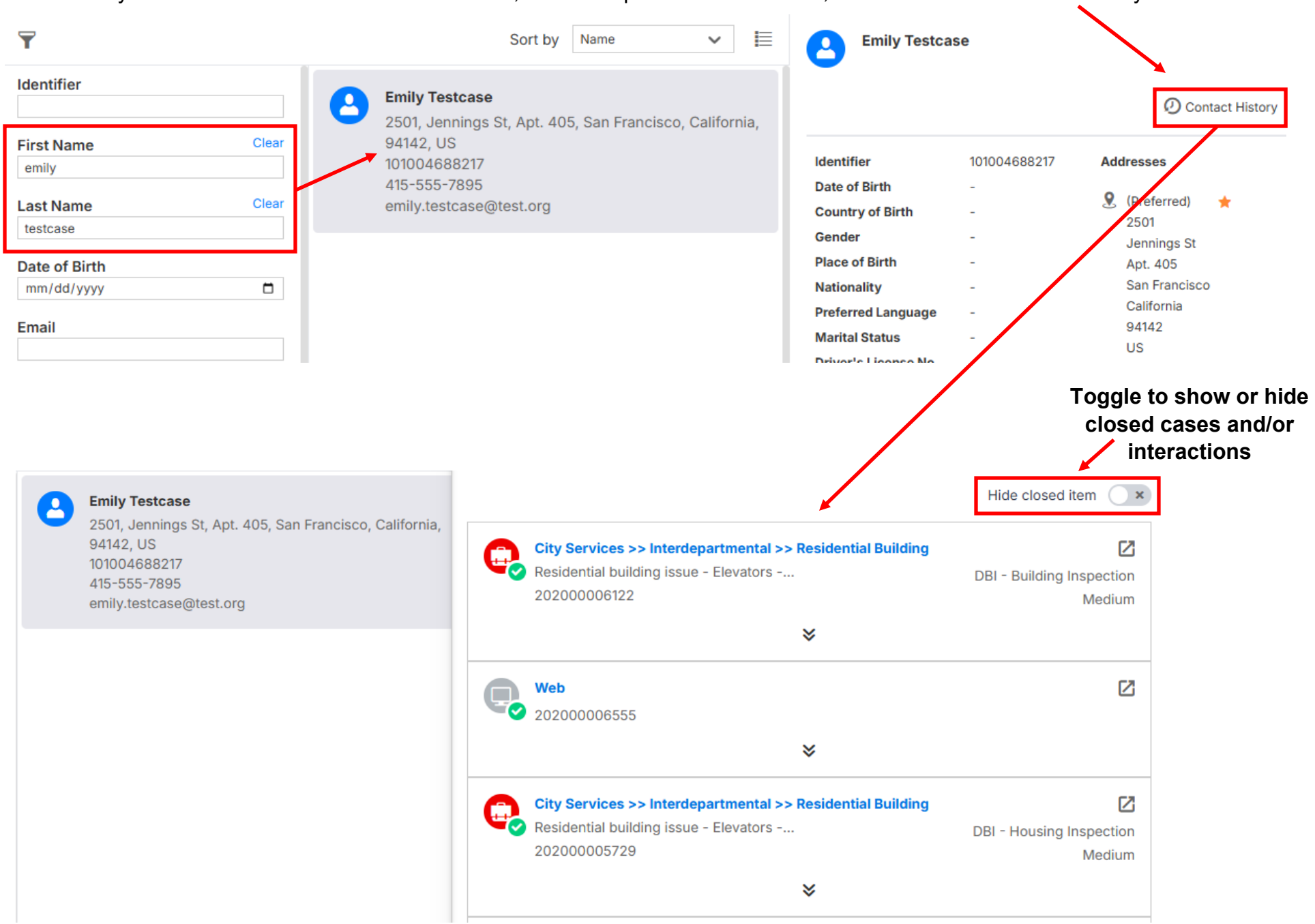
3. More Pages

- Provides options to search for customer records ("Individuals") and locations associated to cases ("Properties"):



4. Individuals / Organizations

- Allows you to search for and select an individual, view their pertinent information, and review their Contact History:



5. Streets / Properties

- Allows you to search for and view streets or properties loaded into the system; "Properties" is the preferred method that allows you to search by specific addresses.
- Allows you to view the contact history for a specific address, and see cases that are associated with the address; works the same as selecting Contact History for Individuals / Organizations.

Tool Bar Options

The Tool Bar contains several shortcuts to enable a user to search, find items and view item details. It will also display any filters that have been selected from the Filter Pane. Depending on account permissions, users may only see a limited number of options.

1. Toggle filter…: click to toggle the **Filter Pane** open or closed.
2. Bulk action switch: allows you to select and perform actions on multiple cases at the same time: "Add note"; "Complete"; "Reallocate"; "Reopen."
3. Sort by menu: provides a selection of sorting options in the Case & Interaction List: "Date Created"; "Date Modified"; "Due date" (default); "Identifier"; "Priority"; **Sort Order**: "Oldest to Newest"; "Newest to Oldest."
4. Toggle preview…: expand and contract the Case & Interaction List view; more cases can be viewed when expanded.



Icons (Case & Interaction List)

= Case: Within due date

= Case: Past due date

= Case: No due date

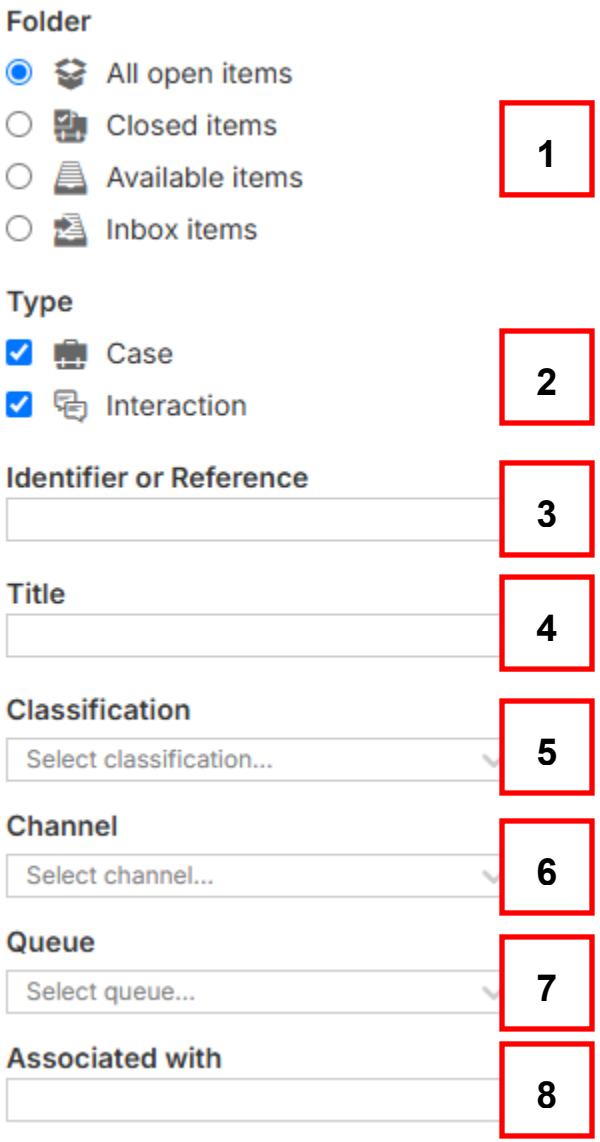
= Interaction: Inbound Voice

= Interaction: Inbound Face to Face

= Interaction: Outbound Email

Filter Pane Options

Allows you to filter items in the **Case & Interaction List** by selecting one or more of the filter options and clicking the "Search" button at the bottom of the pane; clicking on the "Reset" button returns the **Filter Pane** to the default settings.



NOTE:

- When certain filter fields are selected and populated, a "Clear" option appears in the upper right corner of that filter's section pane which will reset that filter to the default when clicked.
- Some filters will not be available when other filters are used, e.g. the "Channel" filter will not be available when the "Type" filter is set to "Case."

1. Folder: radio buttons array; select to filter for "All open items" (default); "Closed items"; "Available items"; "Inbox items."

2. Type: check box array; select to filter for "Cases" and/or "Interactions"; default is both.

3. Identifier or Reference: text field; search for a specific case number ("Identifier") by entering the entire 12-digit number.

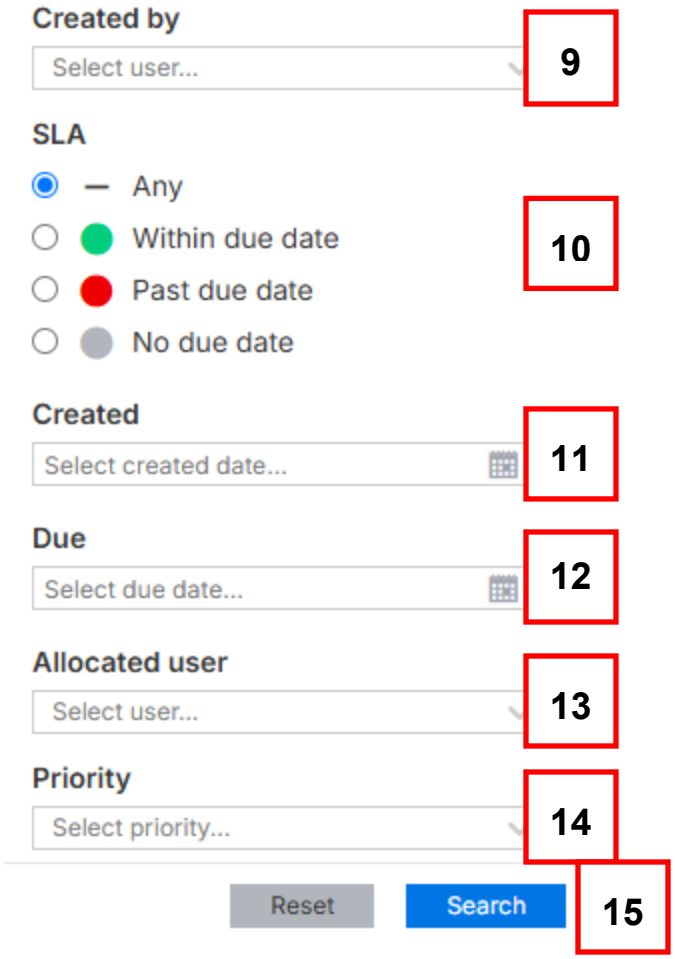
4. Title: text field; search by case title to filter for cases that have specific words in their title, e.g. damaged property, noise, street cleaning, sewer issue, etc.

5. Classification: text & menu field; search by classification (Subject >> Reason >> Type): enter a classification or search via the menu to filter for a specific classification.

6. Channel: text & menu field; multiple options to filter for cases & interactions for channels, e.g., "Voice in," "Face to Face," "Email out," selected social media channels in & out, etc.

7. Queue: text & menu field; search by work queue name: enter a name or search via the menu to filter for cases in a specific work queue.

8. Associated with: text field; search for objects associated to the case: address, intersection, location, and/or customer name.



9. Created by: text & menu field; search by username: enter a name or search via the menu to filter for cases created by a specific user.

10. SLA (Service Level Agreement): radio button array; select to filter for cases that are "Within due date," "Past due date," or "No due date"; default is "Any."

11. Created: menu and date picker field; multiple filter options for case Created date(s); includes a calendar date or date-range picker.

12. Due: menu and date picker field; multiple filter options for SLA Due date(s); includes a calendar date or date-range picker.

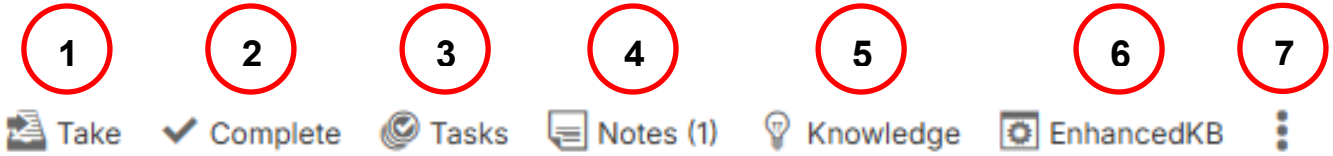
13. Allocated User: text & menu field; search by username: enter a name or search via the menu to filter for cases allocated to a specific user.

14. Priority: text & menu field; multiple options to filter for cases by priority, from "Very Low" to "High."

15. "Reset" and "Search": button array; clicking "Reset" will clear all filters and reset them to their default settings; clicking "Search" is required to initiate a search based on your selected filters.

Case handling Functions Bar

(upper right corner of the **Details Pane**)



NOTE: not all functions will be available to all users depending on your level of case handling permissions.

1. Take: allows you to take ownership of a case, preventing other users from taking it.

2. Complete: allows you to select a case closure reason, add a Description about the closure, and close the case as completed.

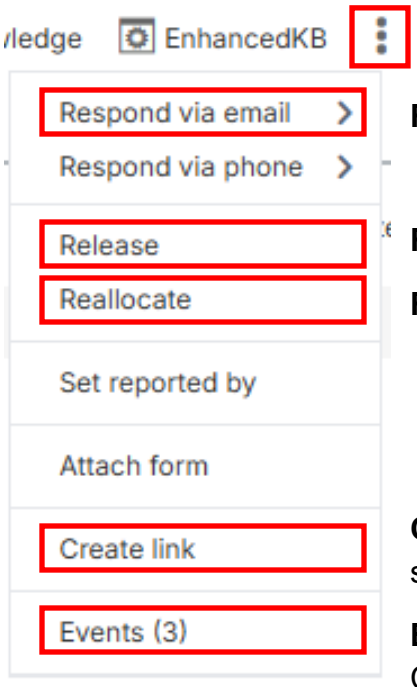
3. Tasks: opens a separate pane to view and complete any tasks specifically associated with handling this type of case.

4. Notes: opens a separate pane to add a note to a case, attach files, and shows entire contents of existing notes and links to files.

5. Knowledge: opens a separate pane that displays the Knowledge screen and search function; only certain Department Users will have their user accounts configured to access the content in the Knowledge screen; for most users the screen will be blank.

6. EnhancedKB: same as for the **Knowledge** pane (above).

7. More: provides additional functions to use in case handling; the most commonly used functions are:

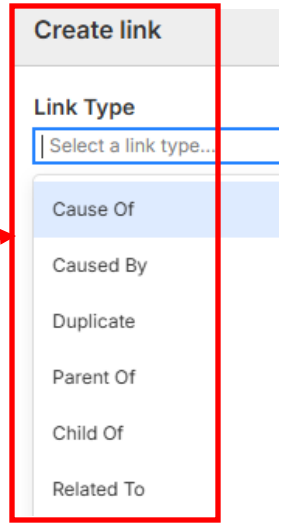


Respond via email: will open the email pane allowing the user to compose & send an outgoing email.

Release: allows you to release a case you took ownership of back to the work queue it was in.

Reallocate: allows you to reallocate the case to a different Work Queue or User.

Create link: allows the user to create a link between the selected case and another existing case.



Events: allows the user to view the entire contents of an event, e.g. Case Created, Case Taken, Case Reallocated, Case Closed, etc.