



VERINT CLOUD CASE MANAGEMENT PROFESSIONAL EMPLOYEE DESKTOP QUICK START GUIDE

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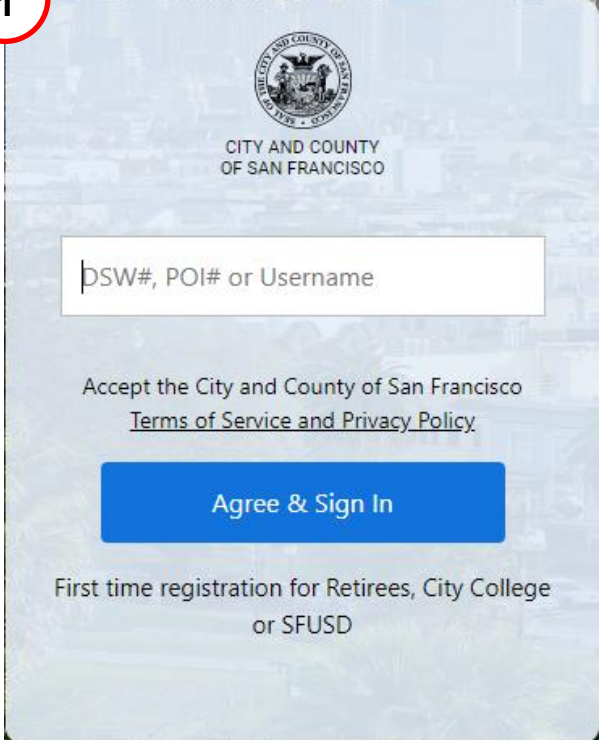
Logging in to the Employee Desktop Application

Access the link to log into the Verint Cloud online portal on the Verint CRM web page: [SF.GOV/crm](https://sf.gov/crm)

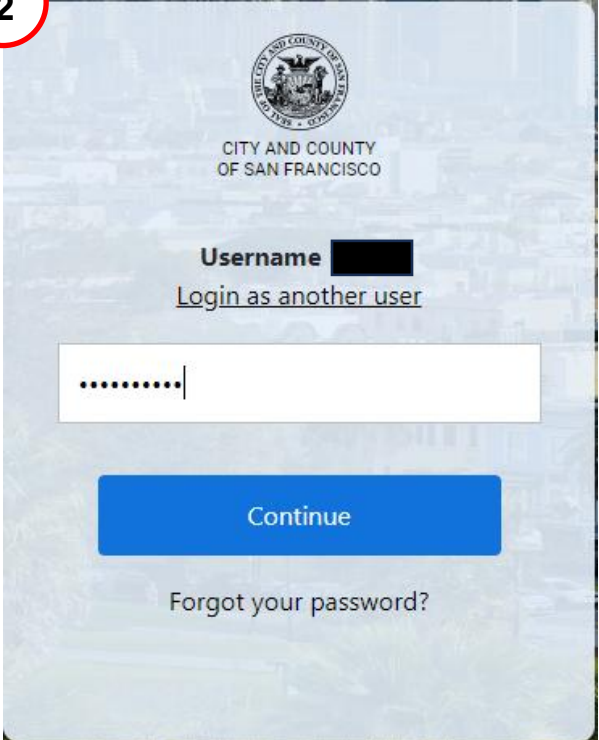
Complete the authentication process:

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 sent to the email address associated with your Verint user account.
3. Enter the six-digit secure code from the email you received and click on "Verify."

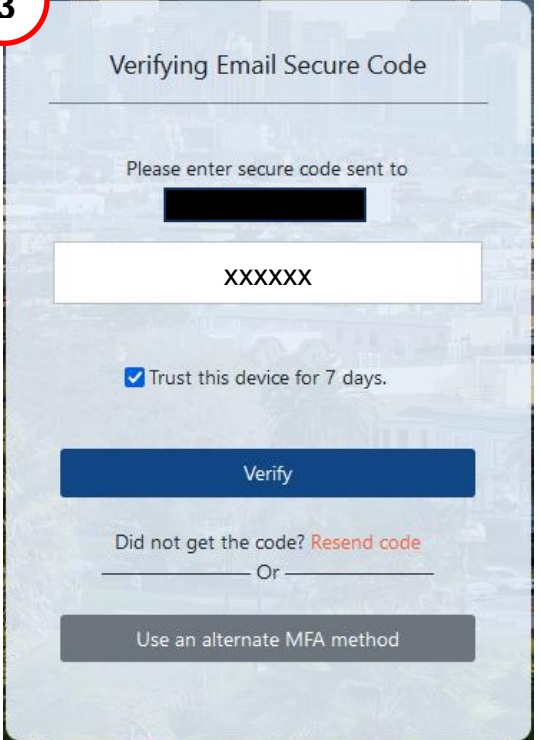
1



2



3



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

The diagram illustrates the three main components of the Case Management System, each in a red-bordered box:

- 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

Options for sorting, viewing & handling cases

Displays options based on user configuration

Case handling functions when a case is selected

The diagram illustrates the layout of the system's main interface, divided into three vertical panes:

- 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, a link to the form, and case-handling Functions Bar.


An arrow points from the Filter Pane to the Case & Interaction List Pane, indicating that the filter selection affects the list display.

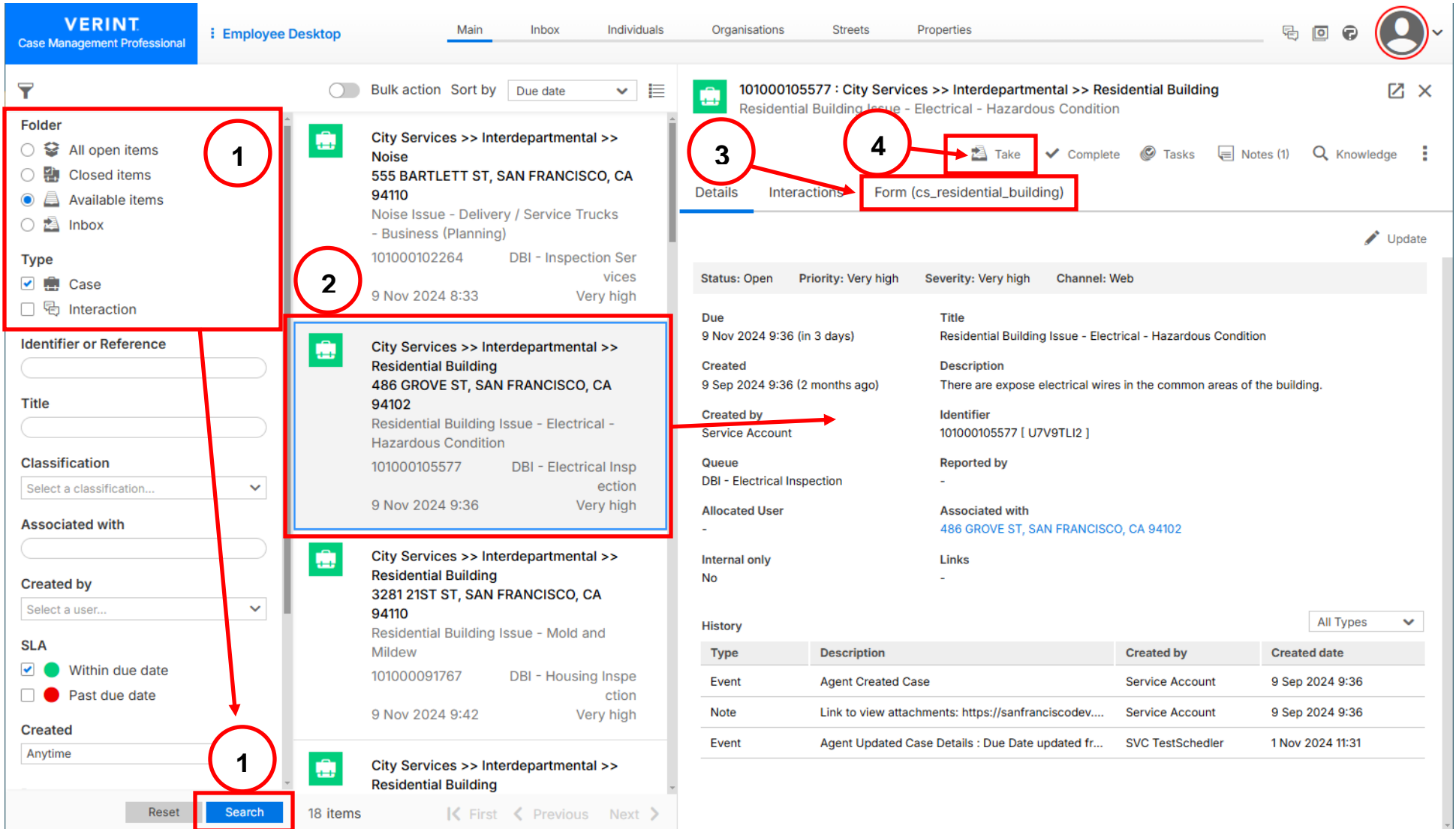
Filter items using various options;
results are displayed in the List

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

Selecting a case populates this pane with its related details, 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" filter shows cases you've already taken 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.



The screenshot displays the VERINT Case Management Professional interface. The left sidebar contains the **Filter Pane** with sections for **Folder** (All open items, Closed items, Available items, Inbox) and **Type** (Case, Interaction). The **Search** button is highlighted with a red circle and arrow. The main area shows a list of cases, with one case selected and highlighted in blue. The right pane shows the **Details** for the selected case, including status, priority, severity, channel, due date, title, description, identifier, reported by, associated with, and links. The **Functions Bar** at the top right of the details pane includes a **Take** button, which is highlighted with a red circle and arrow.

Filter Pane:

- Folder:** All open items, Closed items, Available items, Inbox
- Type:** Case, Interaction
- Search:** Search button

Case List:

- City Services >> Interdepartmental >> Noise
555 BARTLETT ST, SAN FRANCISCO, CA 94110
Noise Issue - Delivery / Service Trucks - Business (Planning)
101000102264 DBI - Inspection Services
9 Nov 2024 8:33 Very high
- City Services >> Interdepartmental >> Residential Building
486 GROVE ST, SAN FRANCISCO, CA 94102
Residential Building Issue - Electrical - Hazardous Condition
101000105577 DBI - Electrical Inspection
9 Nov 2024 9:36 Very high
- City Services >> Interdepartmental >> Residential Building
3281 21ST ST, SAN FRANCISCO, CA 94110
Residential Building Issue - Mold and Mildew
101000091767 DBI - Housing Inspection
9 Nov 2024 9:42 Very high

Case Details (101000105577):

- Status:** Open
- Priority:** Very high
- Severity:** Very high
- Channel:** Web
- Due:** 9 Nov 2024 9:36 (in 3 days)
- Title:** Residential Building Issue - Electrical - Hazardous Condition
- Description:** There are expose electrical wires in the common areas of the building.
- Identifier:** 101000105577 [U7V9TLI2]
- Reported by:** -
- Associated with:** 486 GROVE ST, SAN FRANCISCO, CA 94102
- Links:** -
- History:**

Type	Description	Created by	Created date
Event	Agent Created Case	Service Account	9 Sep 2024 9:36
Note	Link to view attachments: https://sanfranciscodev....	Service Account	9 Sep 2024 9:36
Event	Agent Updated Case Details : Due Date updated fr...	SVC TestSchedler	1 Nov 2024 11:31

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 choose to print the pages of the form.
- 3. You may view the form's "Request Details" (default), as well as "Location Search," "Individual Search," and "Summary."
- 4. The "Summary" view of the form provides more information on the details of the case.

Details

1

Actions

Form (mta_abandoned_vehicle)

Summary view

Form view

Edit form

This form is read only

Reference: YE481200-101000103910

2

Print

Enable editing

3

Location Search

Request Details

Individual Search (Agent)

Summary

4

Request:

Vehicle Parked Over 72-Hours Without Moving

Abandoned Vehicle Issue

Additional Information

Does the vehicle have a license plate?	Yes
License Plate:	1ABC234
Vehicle Make:	Hyundai
Vehicle Model:	Elantra
Vehicle Model:	Red
Vehicle Type:	Car (4 door)

Request Description

There is an abandoned vehicle underneath the BART tracks. Red Hyundai Elantra four door.

Viewing Attachments

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

1. "Submitted photo:" 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.

1 Note Submitted photo: <https://spot-sf-res.cloudinary.com/image/upload/v172...>

✓ Complete Tasks **Notes (2)** Knowledge

Submitted photo: <https://spot-sf-res.cloudinary.com/image/upload/v1725642992/san-francisco/other/gyy0c2hfcezuvj79vlxr.jpg#spot=75565467-1dba-4918-9002-7f7c2e2f752a::spot::>

Spot Reporter 6 Sep 2024 10:16 (about an hour ago)

2 Note Link to view attachments: <https://sanfranciscodev.form.uspreview.empro.ve...>

✓ Complete Tasks **Notes (2)** Knowledge


Link to view attachments:
https://sanfranciscodev.form.uspreview.empro.verintcloudservices.com/form/auto/download_attachments?caseid=101000109143&formref=HPZ8A4C0

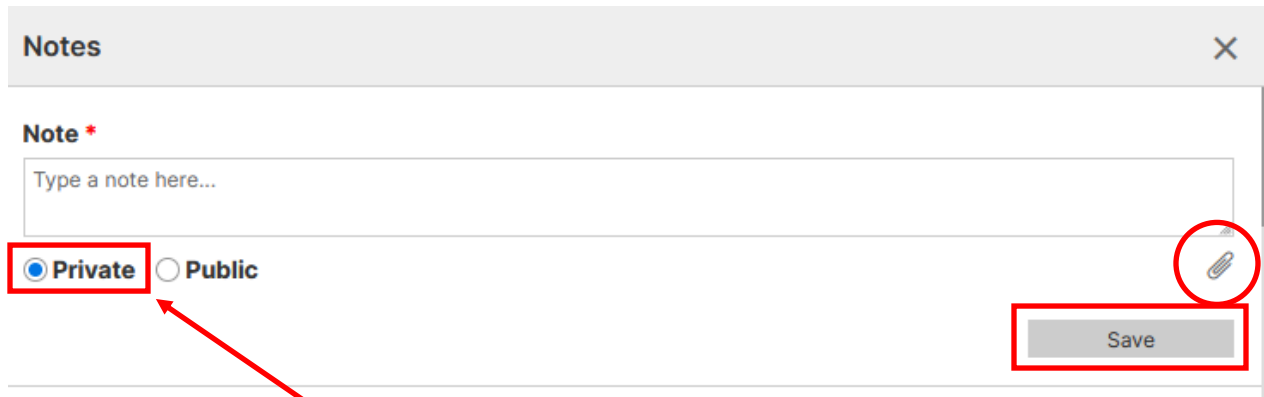
17 Sep 2024 14:36 (about 2 hours ago)

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, closed, etc., in addition to viewing attachments.

Add a Note

Case notes are used to describe actions taken when handling a case and track the progress of the case toward a resolution.

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:




Notes

Note *

Type a note here...

☒ Private ☐ Public



Save

Add an attachment

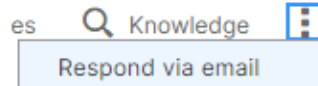
Save the note

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 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"; outbound emails may be sent to the customer by creating your own blank email, or by utilizing a pre-configured email template:

1. **From:** the default email address will be prepopulated.
2. **To:** prepopulated from customer record or manual entry.
3. **Subject:** manual entry or cut and paste from a template.
4. **Cc Bcc:** add more recipients- Carbon copy and/or Blind carbon copy.
5. **Rich text editor:** email text formatting functions.
6. **Add Attachment:** attach files to the email.
7. **Apply message template:** select from a list of available templates.
8. **Send:** 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.

A screenshot of an email composition interface. At the top, there are four tabs: 'Email', 'Details', 'Cases (1)', and 'Interactions'. Below the tabs, there is a 'Send' button (circled 8) and a 'From' field (circled 1) containing 'SVC.311_msgraphdev@sfgov.org'. Below the 'From' field is a 'To' field (circled 2) containing a redacted email address '@gmail.com'. Below the 'To' field is a 'Subject' field (circled 3). To the right of the 'Subject' field are 'Cc' and 'Bcc' links (circled 4). Below the 'Subject' field is a rich text editor (circled 5) with various formatting icons. To the right of the rich text editor are 'Add Attachment' (circled 6) and 'Apply message template' (circled 7) buttons.

Reallocate a Case to a different Queue or User

From the **Functions Bar** click the "More" icon and select "Reallocate" from the menu; add a note to the case indicating the reason for the reallocation:

The screenshot shows the 'Reallocate' dialog box. On the left, a 'Functions Bar' has a 'More' icon (three vertical bars) which is highlighted with a red box and a red arrow pointing to it. Below the 'More' icon is a dropdown menu with three options: 'Respond via email', 'Respond via phone', and 'Reallocate'. The 'Reallocate' option is highlighted with a red box. The 'Reallocate' dialog box itself has a title bar with a close button (X). Inside the dialog, there is a section titled 'Allocate to *'. Under this section, there are two radio buttons: 'Queue' (selected) and 'User'. To the right of the 'Queue' radio button is a dropdown menu labeled 'Select an Option' with a downward arrow, circled with a red circle and the number 1. To the right of the 'User' radio button is another dropdown menu labeled 'Select an Option' with a downward arrow, circled with a red circle and the number 3. To the right of these dropdowns is a checkbox labeled 'All Queues', circled with a red circle and the number 2. At the bottom right of the dialog is a blue button labeled 'Reallocate', circled with a red circle and the number 4.

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. **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.

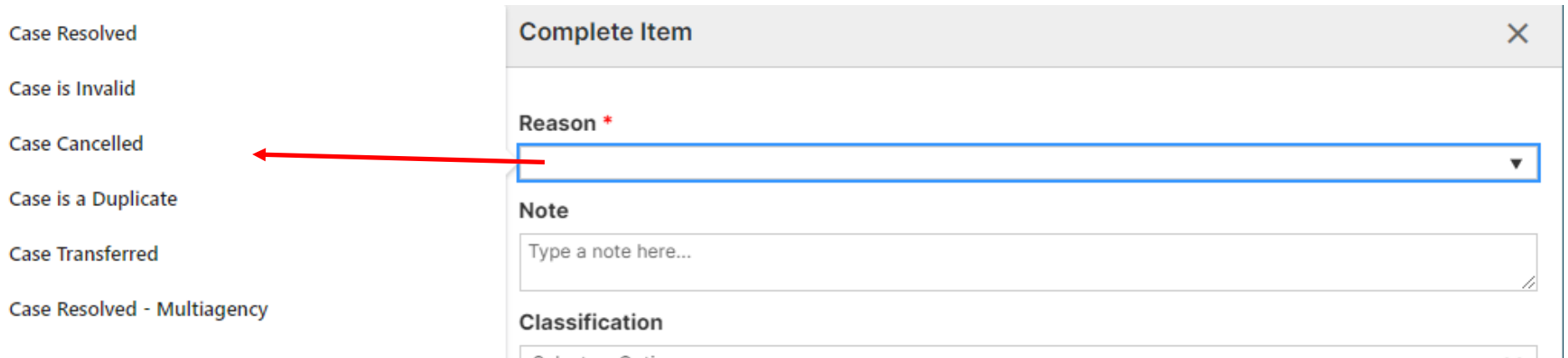
From the **Functions Bar** click the "More" icon and select "Release" from the menu:

The screenshot shows the 'Functions Bar' with a 'More' icon (three vertical bars) highlighted with a red box and a red arrow pointing to it. Below the 'More' icon is a dropdown menu with three options: 'Respond via email', 'Respond via phone', and 'Release'. The 'Release' option is highlighted with a red box.

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 completion reason from the menu that appears on the left; you may also manually enter a custom closure reason here:



In the "Note" field enter appropriate case completion notes, skip over the "Classification" menu, and click the "Complete" button:

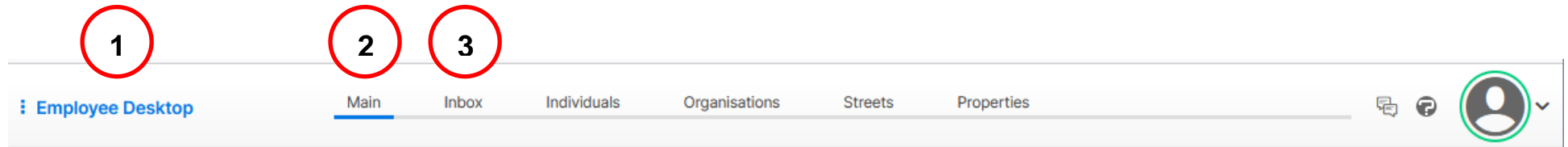


NOTE: case closure notes can be seen by the public when tracking their case(s) so please enter appropriate descriptions & information that complies with the City & County of San Francisco, and your own department's, guidelines.

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. Main

- The primary case handling view
- The default view is "All open items" (cases & interactions) regardless of whether they are allocated or assigned to a user.





Folder

- ☒  All open items
- ☐  Closed items
- ☐  Available items
- ☐  Inbox

3. Inbox

- Displays cases & interactions allocated or assigned to the user
- Selecting the "Inbox" from the **Menu Bar** is equivalent to selecting the "Inbox" filter radio button in the **Filter Pane**:

Folder

- ☐  All open items
- ☐  Closed items
- ☐  Available items
- ☒  Inbox

4. Individuals / 5. Organizations

- Allows the user to search for and select an individual or organization and view their pertinent information.

1 items in : Tommy : Testcase Sort by Name

Identifier

First Name

Tommy

Clear

Last Name

Testcase

Clear

Tommy Testcase

3032 Fulton St, #2 San Francisco

101000000960

415-555-1212

DEVTommy.Testcase@testing.net

- Allows for viewing an individual or organization's contact history.

Tommy Testcase

Identifier101000000960

NameTommy Testcase

Address3032, Fulton St, #2 (preferred)
San Francisco

EmailDEVTommy.Testcase@testing.net (preferred)

Phone415-555-1212 (preferred)

Contact history

PW >> BSM >> Blocked Street and Sidewalk

Blocked Street and Sidewalk or Illegal Parking - Blocked Sidewalk

101000034949

28 May 2024 10:01

Contact history

Toggle to show or hide closed cases and/or interactions

6. Streets / 7. 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, i.e. see cases that are associated with the address.

8. Shows the username you're logged in with, and your status: Online (green) or Offline (red)

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 and/or interactions: Add note; Complete; Reallocate; Reopen.

3. Sort by menu: provides a selection of sorting options in the Case & Interaction List: Updated; Due date (default); Identifier; Queue; Priority.

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



= Interaction >> Phone >> Inbound or Outbound Call



= Interaction >> Email >> Inbound or Outbound Email

Filter Pane Options

Allows the user 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.



Folder

- ☒ All open items
- ☐ Closed items
- ☐ Available items
- ☐ Inbox

1

Type

- ☒ Case
- ☒ Interaction

2

Identifier or Reference

3

Title

4

Classification

5

Associated with

6

Created by

7

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."

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, or just a partial case number, e.g. the last six digits.


4. Title: text field; search by case title to filter for cases that have specific words in their title, e.g. damaged property, noise, Muni lost and found, 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. Associated with: text field; search for objects associated to the case: address/intersection/location, and/or customer name.


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

SLA


☒  Within due date

☒  Past due date


Created

Anytime 


Due

Anytime 


Queue

Select a queue... 


Allocated User



Select an allocated user... 

Priority

Select a priority... 

Channel

Select a channel... 

8

9

10

11

12

13

14

15

8. SLA (Service Level Agreement): check box array; select to filter for cases that are "Within due date" and/or "Past due date" (SLA not breached and/or SLA breached); default is both selected.

9. Created: menu and date picker field; multiple filter options for case Created date(s); includes Custom filter, which launches a calendar date or date-range picker; default is "Anytime."

10. Due: menu and date picker field; multiple filter options for SLA Due date(s); includes Custom filter, which launches a calendar date or date-range picker; default is "Anytime."

11. 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.

12. 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.

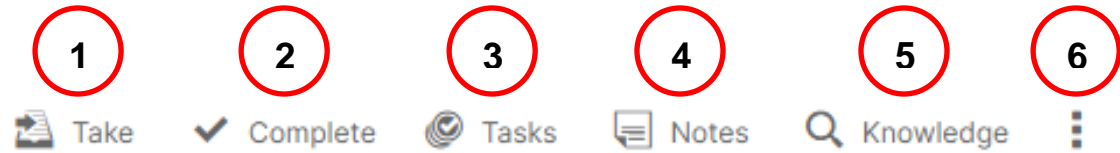
13. Priority: text & menu field; multiple options to filter for cases by priority, from "Very Low" to "Very high."

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

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 the user to take ownership of a case, preventing other users from taking it.
- 2. Complete:** allows the user to select a case closure reason, add notes on the closure, and close the case as completed.
- 3. Tasks:** will open a separate pane to view and complete any tasks specifically associated with handling this type of case.
- 4. Notes:** will open a separate pane to add a note to the case and attach a file if desired; also shows entire contents of existing notes.
- 5. Knowledge:** will open 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. 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 the user to release a case they took ownership of back to the work queue it was in.

Reallocate: allows the user 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 updated, case reallocated, case closed, etc.

