VERINT ENGAGEMENT MANAGEMENT – USER GUIDE

USER LOGIN:

- https://www.sf311.org/crm - click on Verint Engagement Management (EM) Access (start here).
- User name is usually <first name>.<last name>, e.g. john.doe, though there will be exceptions.
- Password is usually the same as for Email, e.g. Outlook.
    - Password reset request for CCSF agencies- consult your IT dept., or contact the Department of Technology Service Desk: 415-581-7100 or dtis.helpdesk@sfgov.org, Mon–Fri, 8am–6pm.
    - Password reset request for agencies outside CCSF, e.g. Clear Channel, Recology, USPS, etc.- content.311@sfgov.org.

INBOX (organize and take cases):

- Refer to the APPLICATION GUIDE for various methods of expanding/contracting the Inbox, & filtering.
- Shows cases (service requests), emails, messages, etc., as applicable to your business process.
- Provides filtering (or search) options for organizing cases, including entering keywords, dates or service request numbers, and sorting by column headers, etc.
- Filter on cases you've taken ownership of by clicking the checkmark in the circle: in the column below (far right) a green checkmark indicates a case you've taken.
- Clicking on any case on the list allows you to view case details in the screen below the inbox.
- Available button options for handling the case include taking ownership of the case (Take), adding a case note (Add Note), closing the case (Close), reallocating a case (More Actions), etc.

TAKE CASES (alternate method):

- Cases you've taken ownership of are "locked" to you and no other user can then take these cases.
- Select the briefcase icon tab on the left-side navigation panel and click on the Take Cases link.
- Click inside the box to the left of the case number- a checkmark will appear; you may check and take one or more cases at a time using this method.
- Click the Take Cases button at the bottom to take ownership of any cases with a checkmark; you will be redirected to the My Cases screen showing all cases taken by you.

HANDLING CASES:

- Refer to the APPLICATION GUIDE for information on case-handling buttons and their functions.
- On the My Cases screen, clicking on a case number in the Reference column will open the case for viewing the details (Title, Description, Created Date, etc.), eform, notes, events, etc.
- Steps for handling cases will vary by department processes and may include, but are not limited to:
    - Contacting a customer to provide information, e.g. sending an email (Respond via).
    - Adding a note to the case describing any actions you may have taken, or include information relevant to the resolution of the case (Add Note).
    - Completing a pre-configured, assigned task, where applicable.
    - Closing a case after it's been resolved (Close).
    - Reallocating the case to another work queue or user (More Actions).
    - Releasing a case back to the work queue you took it from (More Actions).
- Sending an email: click the Respond via button, click the "Create email without template" link or select an existing template from the list as appropriate, complete all necessary fields (To, Cc, Subject, Message, etc.), add an attachment if necessary, and click the Send button.
- Adding a case note: click the Add Note button, enter appropriate text in the "Note" field, add an attachment if necessary, and click the Add button to attach the note to the case.
- Tasks can be added to cases based on individual department's business processes and are pre-configured in the EM system by 311; contact 311 for more information on adding tasks to cases.

CLOSING CASES:

- Cases are most commonly closed when the service request has been resolved, though in some instances a service request may be closed as a duplicate of another service request, or closed as invalid due to a lack of actionable information/details.
- After all appropriate actions have been taken to resolve the service request, click the Close button:
  - From the “Title” menu select an appropriate case-closure reason; you may also click the or Define Custom Title button to enter a brief, customized case-closure reason.
  - In the “Description” field enter any pertinent actions and/or information relevant to the resolution and closure of the case.
  - Click the Close Case button and the case will be closed in your work queue.
- Closing a case as a Duplicate: always include in the case-closure reason the reference number for the case it’s a duplicate of.
- Case closure notes/descriptions are public and are viewable through various methods: the 311 Mobile App; the 311 web site using “Track Case”; on the DataSF web site.

REALLOCATING A CASE:

- The most common reason for reallocating a case is because it’s not a service request that is handled by your department, agency, division, business unit, etc., though there may be other reasons for reallocating a case based on your individual department’s processes.
- After determining that the case is not yours to handle, while viewing the case details click the More Actions button and from the drop-down list select “Reallocate”:
  - From the “Allocate to a queue” menu select “CSP Supervisor Queue”; this is a 311 queue where a supervisor will determine the appropriate queue to send it to.
  - From the “Title” menu select “Incorrect queue.”
  - In the “Description” text field enter a brief reason for why the case is being reallocated.
  - The reason may be as simple as “This service request is not handled by our department.”
  - The reason may also include a suggestion as to the appropriate dept. that should handle the service request but this is not required, and unless you’re sure, don’t guess.
  - Click the Reallocate Case button and the case will be gone from your work queue.
- Reallocating a case to a queue within your own department, agency, division, business unit, etc.: this is done based on pre-defined business processes and is usually done at the “supervisor” level.
- Reallocation notes are subject to the Sunshine Ordinance.

RELEASING A CASE:

- The most common reason for releasing a case you’ve taken ownership of is that you’re unable to begin or complete the work necessary for resolving and closing the case.
- Releasing a case will return it to the work queue it was taken from so that it can then be taken by another user for handling.
- To release a case, while viewing the case details click the More Actions button and from the drop-down list select “Release”: the case will be “unlocked” and available again in Take Cases.

CASE SEARCH:

- Select the briefcase icon tab on the left-side navigation panel and click on the Case Search link.
- Enter a Case Ref (service request) number or select other search parameters from the various menus and/or date picker fields.

SEARCH FOR INDIVIDUALS, ORGANISATIONS, PROPERTIES, STREETS:

- Select the magnifying glass icon tab on left-side navigation panel and click on appropriate link.

QUESTIONS or REQUEST TRAINING: content.311@sfgov.org