CSS Service Ticket Creation & Dispatch Training Supplement

February 2017



Table of Contents

EMGC BANKING VALUE UPDATES	5
EXAMPLE: EMGC URGENCY & PRIORITY EXAMPLE: EMGC SUB CATEGORY (STATUS)	5 6
SECURITY UPDATE – DELETING LABOR ACTIVITIES	7
EXAMPLE: CHANGING THE DISPOSITION OF A LABOR ACTIVITY TO NOT DONE	7
QUICK TIPS – CALL INTAKE & DISPATCH	11
EXAMPLE: USING THE URGENCY CODE TO PRIORITIZE CALLS BY PRIORITY (4 HOUR, 8 HOUR, ETC. ETA RESPONSE TIMES) EXAMPLE: DETERMINING CUSTOMER REQUEST FOR SERVICE PRIORITIES (CUSR)	11 14
MONITORING STATUS UPDATES	17
EXAMPLE: SEARCHING AND FILTERING BY AKA/MONITORING STATUS	17
MTE/SBN LABOR TIME UPDATES	21
EXAMPLE: PREVENTING LABOR TIME UPDATES	21



Version	Reason for Change	Date
0.1 – Draft	Created Document	November 15, 2016
0.2 – Draft	SME Review & Updates	November 17, 2016
1.0 – Final	Initial Release	November 17, 2016
1.1 – Draft	OT2 EMGC Value Enhancements	February 16, 2017

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EMGC Banking Value Updates

Wells Fargo is adding a priority code of EMG which corresponds to an emergency request and requires a 15 minute SLA response. For incoming EDI service orders that have an EMB priority code assigned, Astea will auto-apply the EMGC sub category (status in SBN), the EMGC urgency code, and a 15 minute T&M contract. The 15 minute contract will appear on the Billing & Misc. tab of the service order.

Note: these codes are intended to be used for banking (Wells Fargo) customers only.

Example: EMGC Urgency & Priority

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Example: EMGC Sub Category (Status)

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Example: 15 Minute Contract

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Security Update – Deleting Labor Activities

In order to preserve historical data accurately and with minimal disruption to the normal business processes, the ability to delete a labor activity has been removed from all user roles (Call Intake, Dispatch, and Branch Associate). In lieu of deleting a labor activity, when one is created in error or no longer needed, users should simply cancel that labor activity by updating the Disposition to Not Done.

Example: Changing the Disposition of a Labor Activity to Not Done

Action	Result
 Enter Service Order in the Find field of the Ribbon bar. 	eld
 Search for and select the service order for which you wish to cancel labor activity 	





Action

Result

3. Select the Activities tab.



Highlight the open activity and select
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Action Result 5. Click on the Disposition drop down Uz Fink (UAT1 on UAT1) - Astea Employee Portal-Stanley Black and Decker, Inc. ©[+ → ◊ × ⊡] = and select Not Done. Home My Ny Hume Calendar Find Legent Ext 1 Refresh X Stop New 20.00 E a + a Dearline Date: 1 Node: D Action Group: AU134 Labor Stat. Purtiely completed IPL Status: Agent: Mat. Stat. Invice Order D Save Apply New Refeat Atab Mail Report Expert Analyse W 38 -应 37 . 4 R 🕹 💩 H 4 22 2 H B. Backto Mt 💠 Add 🗙 (stris nfo Activity Checklet Address Activity Info Line Nr.: 2 Demand Status: Canceled 1h00m * * LABOR-BURG Activity Original Duration: 1h:00m Ling Long Duration Activity Allocated SA: 1.ST Not Before: 11 18 Do not display on Dispatch SA: Latest End: 12 18 Action group for Philadelph Action Gro Do not schedule with DSE Fixed App Priority 2 N/A 415 ETA: 831/2016 3 218 PM C Time Zone: Depatch: External Vendor Contract Start: 100 Vendor: ~ A Depositions Comment: Completion: Travel To Cust Zone Charge By: Start Start: 18 100 Arrival 131 Antak

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6. Select **Apply** to save the changes and to update the labor activity status to Cancelled.

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Quick Tips – Call Intake & Dispatch

Capturing key data during the call intake process greatly improves the ability of the dispatchers and/or DSE to accurately prioritize and allocate labor activities. The following quick tips demonstrate how to use the Urgency Code properly during the call intake process, regardless of the dispatch method applied. Once created, the same process is used to update the Urgency Code in the event dispatch needs to reset the call priority based on the call description.

Example: Using the Urgency Code to prioritize calls by Priority (4 hour, 8 hour, etc. ETA response times)

In some cases, a customer has a service contract that requires a specific response window (4 hour, 8 hour, etc.). Because contract data is not yet available in Astea and Service Bulletins and Alerts are not actionable data usable by DSE (both are considered notes and are not dynamic data that can be used by DSE), it is critical that an Urgency is assigned to the call. Therefore, when creating a service order for a customer with an Alert that indicates specific ETA requirements, an Urgency Code indicating those ETA requirements **must** be assigned in order to determine the call Priority.



Action

2. If a customer requires a particular response window, the information is contained within the Alert (Service Instructions) that appear when the customer is selected during the new service order creation process.



 Open and read the alert by selecting the (View) button. Select the red X to close the Alert.



STANLEY.

Action

- 4. Select the **Urgency** drop down and based on the information in the alert, choose the appropriate response time:
 - BNK4 Banking: 4 Hour Response
 - BNK8 Banking: 8 Hour Response
 - NBK4 Non-banking: 4 Hour Response
 - NBK8 Non-banking: 8 Hour Response



- 5. Select Apply to:
 - Trigger the Astea escalation rules to update the service order Priority and attach a Time and Materials contract to update the ETA.
 - Create actionable data (time and materials contract & ETA) for use by DSE or the dispatcher to prioritize the activity correctly within the defined parameters when scheduling the work

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Example: Determining customer request for service priorities (CUSR)

Currently, if a customer calls in with a standard request for service, call intake selects an Urgency of CUSR – Customer Request for Service. However, some requests should be considered higher priority than others; therefore, we have split the CUSR urgency code into the following three codes in Astea:

- CUSR-E exterior premise issue that affects the ability for the site to be secured
- CUSR-I interior, high security area (for example: vault) where the service technician must have an escort to perform service
- CUSR-O any other request for service

Splitting the CUSR urgency code into three options allows Astea to assign a higher priority based on defined rules.

Action	Result
Action 1. Enter Service Order in the Find field of the Ribbon bar.	Result
	ASTEA alliance

Action

- Select the Urgency drop down and based the problem description, select the appropriate CUSR value:
 - CUSR-E exterior premise issue that affects the ability for the site to be secured
 - CUSR-I interior, high security area (for example: vault) where the service technician must have an escort to perform service
 - CUSR-O any other request for service

3. Select **Apply** to trigger the Astea escalation rules to update the service order Priority based on the Urgency selected.



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Action

Note: the Priority is visible in the Service Order module (see screen shot in step #3), the Dispatch Console, and the mobile application. Priority is used automatically by DSE or manually by the dispatcher to determine which calls should be scheduled first. Result

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Monitoring Status Updates

As a means to improve accurate CID selection when searching for a customer during the service order creation process, the SBN Monitoring Status is now available from the AKA field. This change allows users to not only search by the monitoring status, but to filter search results by the monitoring status as well. Back office users will now have the ability to view, search, and filter by Monitoring Status from the following modules:

- Service Order [New]
- Service Order (within the QBE and existing service order)
- Customer Center QBE

Example: Searching and filtering by AKA/Monitoring Status



STANLEY. Action Result Elizabeth Fink [Env2_Test6ServiceDispatch on Test 2] - Astea Employee Portal-Stanley Black and Decker, I 2. Select Go. Find: Service Order <u>1</u> Logout Exit 30 $\langle - - \rangle$ Go * My My 1 Recently Opened Shutdown 🗉 🛛 🗠 🚮 My Home 🗶 🥵 Se Nev Export View Last Viev 0 🗸 🗐 est ID Like Customer Like Customer ID Like Line ng Clear 👂 Search 1-10/159 👄 Line 1 SEARS Customer HOLDING C Site Site ID Node Node ID Created by Orde BR734 RS HOLDING CORP. NG CORP. n chì 1 SEARS HOLDING CORP. INS71999535972 SEARS HOLDING CORP. INS71999535972 Indianapolis (Branch) BR734 SHANNON RICE, CORP. bu_Integratio Open I SEARS HOLDBIG CORP. BK311999555922 SEARS HOLDBIG CORP. BK311999555922 Indianapolis (Branch) BK32 Dor Jane 1 SEARS HOLDBIG CORP. INST1999555922 SEARS HOLDBIG CORP. BK31999553972 Indianapolis (Branch) BK32 Dor Jane 1 SEARS HOLDBIG CORP. INST1999535972 SEARS HOLDBIG CORP. INST1999535972 Indianapolis (Branch) BK73 Dor Jane 1 SEARS HOLDBIG CORP. INST1999535972 SEARS HOLDBIG CORP. INST1999535972 Indianapolis (Branch) BK73 Dor Jane D/F1216 Assign EXF1216 EXF1216 Assigne 1 SEARS HOLDING CORP. INS71999535972 SEARS HOLDING CORP. INS71999535972 Indianapolis (Branch) BR734 1 SEARS HOLDING CORP. INS71999535972 SEARS HOLDING CORP. INS71999535972 Indianapolis (Branch) BR734 robert ROP0824 Open Open 0505130042 asteaint 1 SEARS HOLDING CORP. INS71999533972 SEARS HOLDING CORP. INS71999533972 Indianapolis (Branch) BR734 MICHAEL TORPI, CORP BFEDJE Open SV1505130039 1 SEARS HOLDING CORP. INS71999535972 SEARS HOLDING CORP. INS71999535972 Indianapolis (Branch) BR734 Fink Liz asteaint Berry Dor

3. Select the **New** (New) icon.



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4.	Select the (Lookup) button to the right of the Customer field.	Catalog Her Catalog Her My My Home Calendar Hume	er Links ned service order reve Total security Ope	Ule name	Search	Lie Fink (U	ATI on UATI	- Astea Employee	Portal Stanley I Platary * Q Refuesh II ¥ Stop repation	Black and D Logout Shutd	becker, Inc Kat Isan		a All
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5. The AKA column is prepended with the Monitoring Status. Enter the search criteria in the AKA field and select Search. Search criteria can include: AKA, monitoring status, or store number.

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Action Result 6. Finish entering/selecting the Liz Fink (UAT1 on UAT1) - Astea Employee Portal-Sta ey Black and Decker, In GI--OXDI. necessary information to complete the My My Find service orde Hidoy * Pack Teel & Refeath X Step 60 C• × New service order and choose Save & Logout Talesently Opene Continue. (1 M Open Date: 11/15/2016 Open Time: 2:25:00 PM Node: 8P134 Created By EXF1216.8 ID SVI . 1 100 Ann an Ann an Anton Ann P and Save Ani C And New Save And Ed Customer ISVC 55140 Incid 66 ø Provider Requested By * KOHL'S DEPT STORE 1114705078 Contrac Customer: CD; Philadelphia Customer ID: * INS123137278800 Mess Panel. 9412094[1114705078] Zp Code: tern D SEN CID/Panel 17602 Contact CARL BOUR DM Categon 7177560471 Sub Cate Phone: Ste: KOHL'S DEPT STORE AKA: Ste D: INS123137278800 Sub Type ~ pripact: Do not deplay on D Problem Code: UM Y ¥ Request Type: Urpinici 11/15/2016 225 PM Open Date: 1 II/A Principal nt ID - item_id, Business Object -

7. The Monitoring Status can be viewed from the Service Order above the Requested By field and in the AKA field. Additionally it can be viewed from the AKA column in the Service Order and Customer Center QBEs.

Note: while the Monitoring Status is now available from the Service Order and Customer Center modules, it **will not** be displayed on the Service Order Vendor form or the Service Ticket.

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MTE/SBN Labor Time Updates

In order to ensure labor time is being reported accurately, we are now preventing updates to labor times on an SBN work order that is Closed or in a Held Reason (SRV-RTI, SRV-RTB, or SRV-RTC) when the labor time in MTE is updated.

Example: Preventing Labor Time Updates

If time is updated in MTE by a service technician and the SBN work order is **Closed** (C.Flg = X) the labor time on the SBN work order is now prevented from updating.

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	11/10/16	11/10/16		Х				SE	RVICE CALL		SRV	-OUT	Service Work Orc	ler
	11/11/16	11/11/16		Х				SE	RVICE CALL		SRV	-RTB	Service Work Ord	ler

Similarly, if time is updated in MTE by a service technician and the SBN work order is in a **Held Reason** (SRV-RTI, SRV-RTB, or SRV-RTC), the labor time on the SBN work order is now prevented from updating as well.

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11/10/16	11/10/16	Х		SERVICE CALL	SRV	4RTB Service Work Or	der
11/10/16	11/10/16	Х		SERVICE CALL	SHV	•RTC Service Work Or	der
11/10/16	11/10/16	Х		SERVICE CALL	SRV	40UT Service Work Or	der
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11/10/16	11/10/16			SERVICE CALL			
11/10/16	11/10/16			SERVICE CALL			
11/11/16	11/11/16			SERVICE CALL	SRV	/-RTC Service Work Or	der
11/11/16	11/11/16	Х		SERVICE CALL	SRV	•001 Service Work Or	der
11/11/16	11/11/16			SERVICE CALL			