Assign a Case
At A Glance

Case Management Process

Log a Case	Categorize a Case	Investigate and Diagnose	Resolve and Recover	Validate and Close
	Assign a Case			

Purpose

A Case is assigned to the appropriate Support Engineer based on the skillsets and resource capability to make sure that the issue is taken care of as soon as possible.

Best practice for manually assigning a Case – Next Action Monitor

Sort the column **Next Action Due** in the Next Action Monitor list in descending order when monitoring the list and pick up the first Case.

This helps ensure that Cases requiring immediate actions due to SLA fulfillment can be taken care of first.

1. Assign a Case

Option A: Assign a Case to yourself
1a Monitor the Case list for unassigned Case
1b Assign the selected Case to yourself

Option B: Assign a Case to another Support Engineer
1a Monitor the Case list for unassigned Case
1b Manually assign the Case to the appropriate Support Engineer

Manual Assignment

Option C: System automatically assigns a Case via Advanced Work Assignment (AWA)

Advanced Work Assignment (AWA) automatically assigns the Cases to qualified Support Engineers based on their availability, capacity, and skills. The assigned cases can be seen in Support Engineers' Agent Workspace inbox.

Follow the steps here to set up your skills and capacity.

Automatic Assignment

Notes ⚠

- The Support Engineer is responsible to fulfill the SLA on ALL levels whenever he takes over the Case
- IRT is only fulfilled after the first qualified response is sent to the Customer via **External Info** in the Case
- Queue Manager needs to ensure the adherence to ORT and the processor (Support Engineer, Developer, or Operator) is responsible to fulfill the ORT
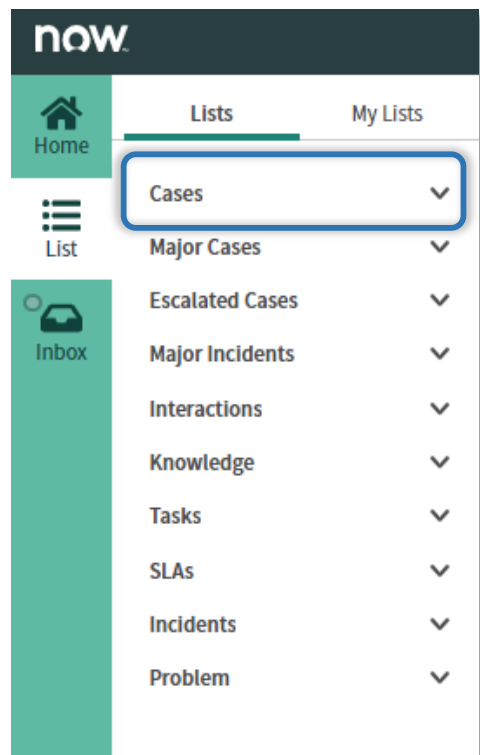
1. Assign a Case
Case Management

Option A: Assign a Case to yourself
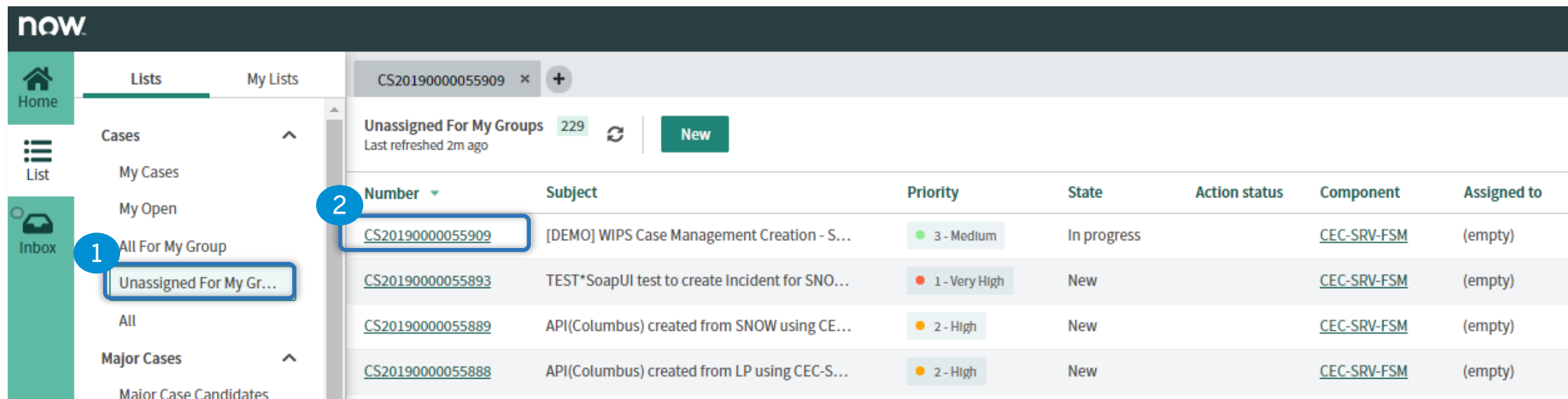
1a Monitor the Case list for unassigned Case

Step 1

Open **List view** and click **Case** Module.

Step 2

Click **Unassigned For My Groups** in the list to view all Cases that have not been assigned to any Support Engineer.

Then click the Case **Number** to open the Case record.

Notes ⚠

The Support Engineer can also go to **Next Action Monitor** saved under **My List** to see all prefiltered Cases that need to be assigned based on specific conditions. Click here to see how to set up a monitor.

1. Assign a Case
Case Management

Option A: Assign a Case to yourself

1b Assign the selected Case to yourself

Step 1

Click **Assign to Me**. Now the Case is assigned to yourself. This activity is documented down in the Activity stream.

To unassign the Case, delete the name shown in the **Assigned to** field and the click **Save** to update the record.
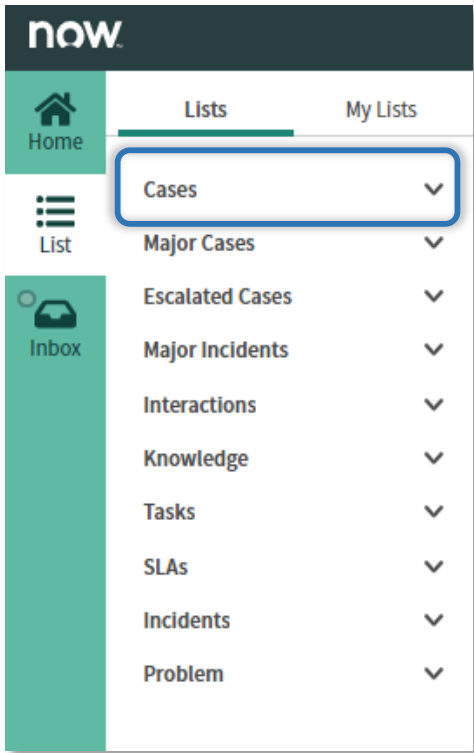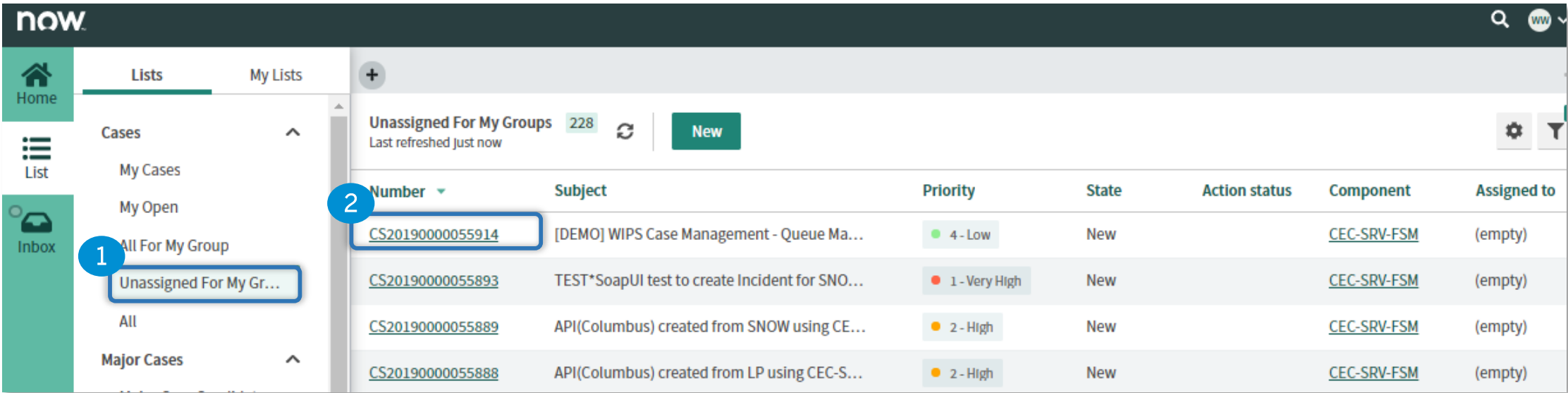
1. Assign a Case
Case Management

Option B: Assign a Case to another Support Engineer

1a Monitor the Case list for unassigned Case

Step 1

Open **List view** and click **Case** Module.

Step 2

Click **Unassigned For My Groups** in the list to view all Cases that have not been assigned to any Support Engineer.

Then click the Case **Number** to open the Case record.

> **Notes** ⚠️
>
> The Support Engineer can also go to **Next Action Monitor** saved under **My List** to see all prefiltered Cases that need to be assigned based on specific conditions. Click here to see how to set up a monitor.

Option B: Assign a Case to another Support Engineer

1b Manually assign the Case to the appropriate Support Engineer

Step 1

Add the Support Engineer to the field **Assigned to** and then click **Save** to update the record. This activity is documented down in the Activity stream.

To unassign the Case, delete the name shown in the **Assigned to** field and the click **Save** to update the record.

Notes ⚠️

Best Practice for Assigning a Case

- Send ONE email for ONE Case and ask the Support Engineer in person or via Lync/Skype to help

- Notify the Support Engineers that are readily available based on RCC and OSD settings

- Check whether the Case is already blocked before sending notification email

Monitoring P1 and SLA Relevant Cases

Hint: How to create Next Action Monitor in NOW?

1. Go to **All Cases** list to see all Problems assigned to your group.

2. Click the **filter** icon on the top right corner to open the filter.

3. Click **Advanced view** to open the criteria setting.

4. Create the condition list for the monitor based on your specific criteria.

5. Click **Update**. The list will be filtered based on the defined conditions.

Notes ⚠

The filter shown in he screenshot is only an example for filtering P1 Cases. Click here to see more examples of frequently used filtering conditions.
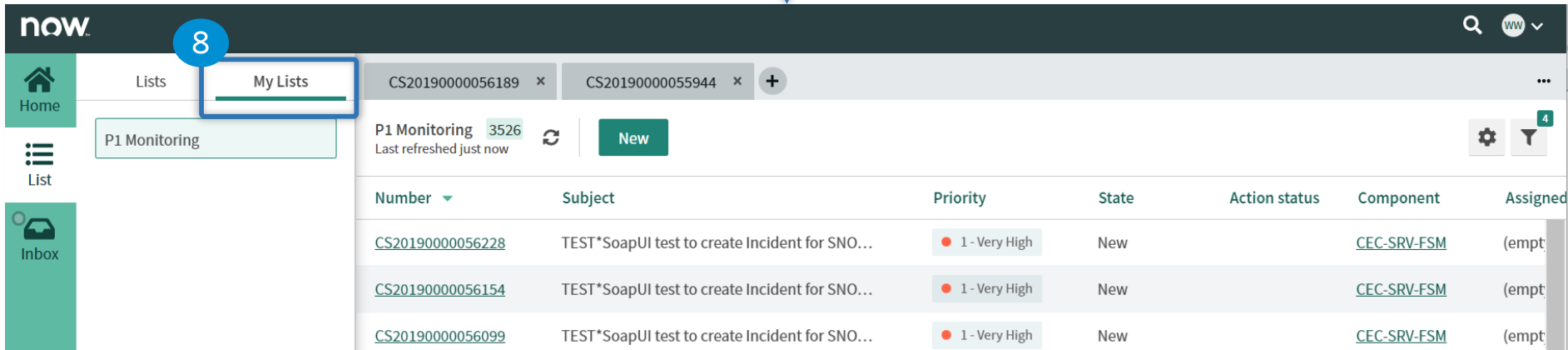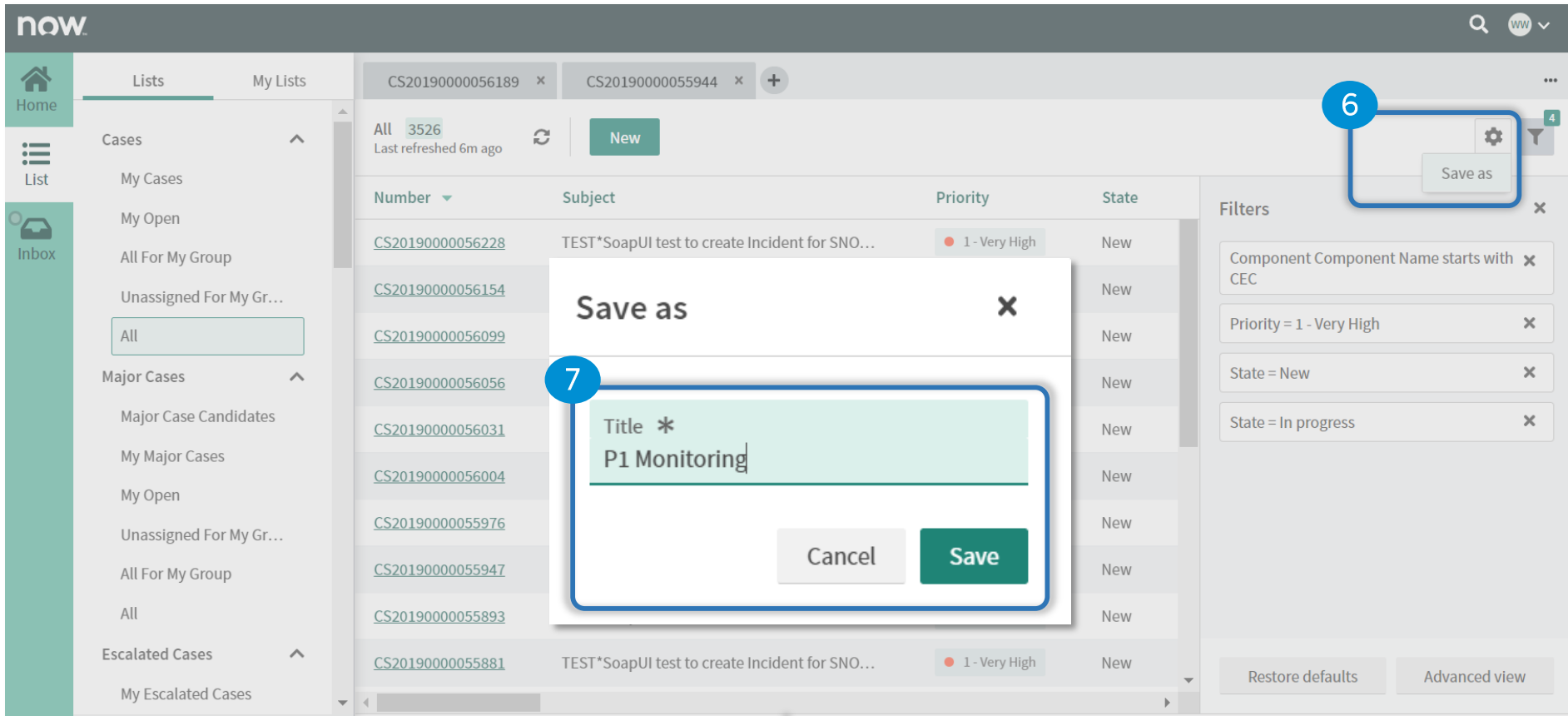
1. Assign a Case
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Monitoring P1 and SLA Relevant Cases

Hint: How to create Next Action Monitor in NOW?

6. To save this filtered list for future monitoring, click the **settings** icon and then click **Save as**.

7. Enter the name of the list in the pop-up window and click **Save**.

8. The saved list will be displayed under **My Lists**.

Monitoring P1 and SLA Relevant Cases

Hint: How to create Next Action Monitor in NOW?

9. Select the newly created list, click the **settings** icon and then click **Personalize Columns**.

10. Select all necessary fields to be displayed in the list and move up or down the columns according to your needs.

11. Click **Update** to update the list.
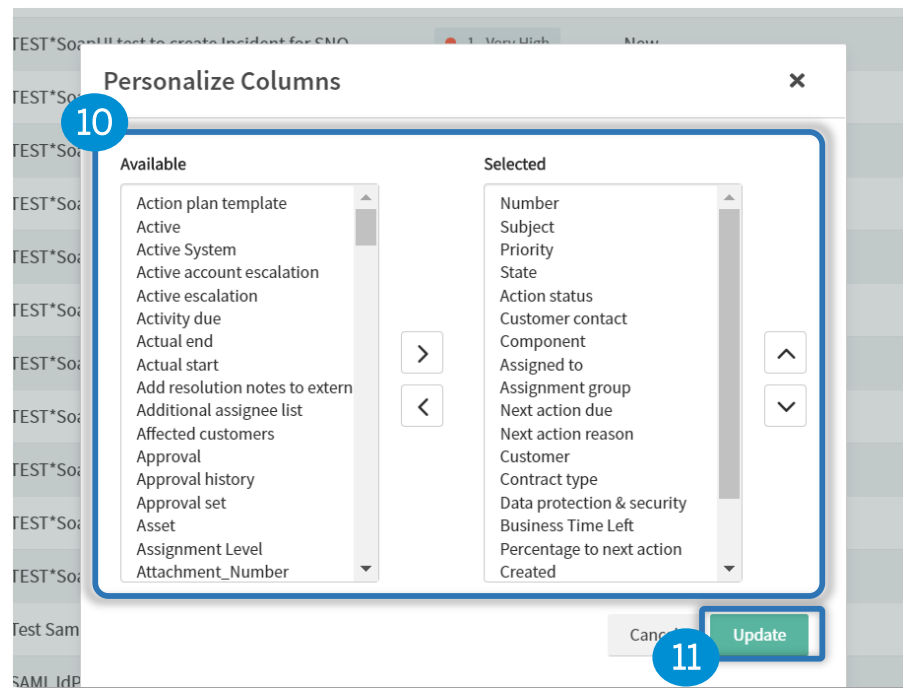
12. Sort the **Next Action Due** in **descending** order. Click the **settings** icon again and then click **Save** to update the list.
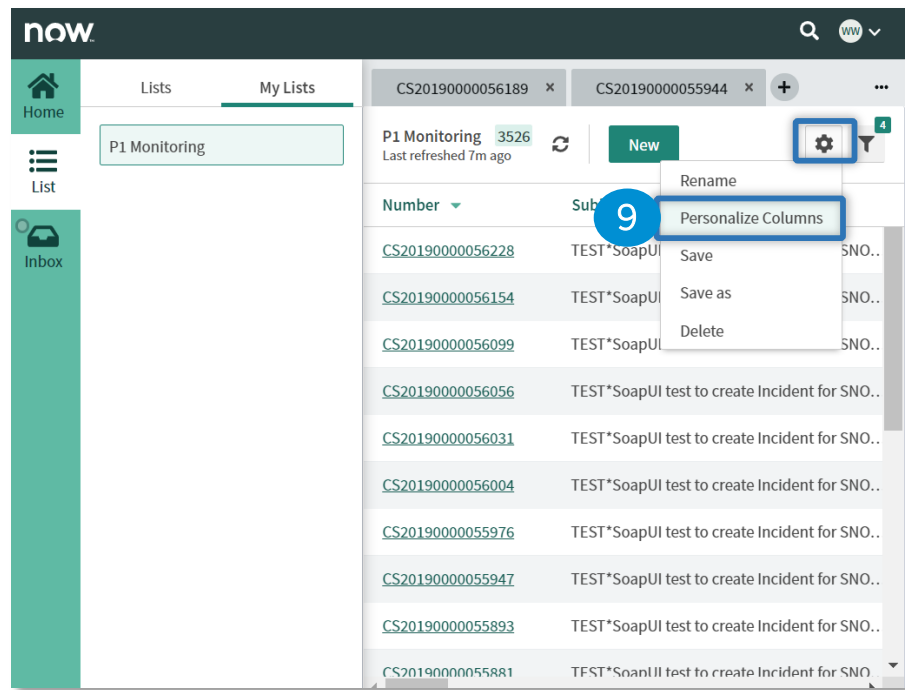
1. Assign a Case
Case Management

Monitoring P1 and SLA Relevant Cases
Hint: How to create Next Action Monitor in NOW?

Frequently used example for monitoring P1 Cases

Advanced view

All of these conditions must be met

Component	starts with	CEC	⊖	OR	AND
Priority	is	1 - Very High	⊖	OR	AND

and

State	is	New	⊖	OR	AND
State	is	In progress	⊖	OR	AND

AND / OR

Frequently used example for monitoring SLA relevant Cases

Advanced view

All of these conditions must be met

Component	starts with	CEC	⊖	OR	AND

and

Next action reason	is	IRT	⊖	OR	AND
Next action reason	is	ORT	⊖	OR	AND
Next action reason	is	APT	⊖	OR	AND

and

State	is	New	⊖	OR	AND
State	is	In progress	⊖	OR	AND

OR

Change Log
Case Management – Assign a Case

Change Log

Version	Changed by	Date	Description of changes	Status
1.0.0	Melinda Ludanyi	June 21, 2019	▪ WIPS 4.0 initial document	Draft
2.0.0	Wei Wei	Nov 18, 2019	▪ WIPS 4.0 Golden Standard baseline document	Released