

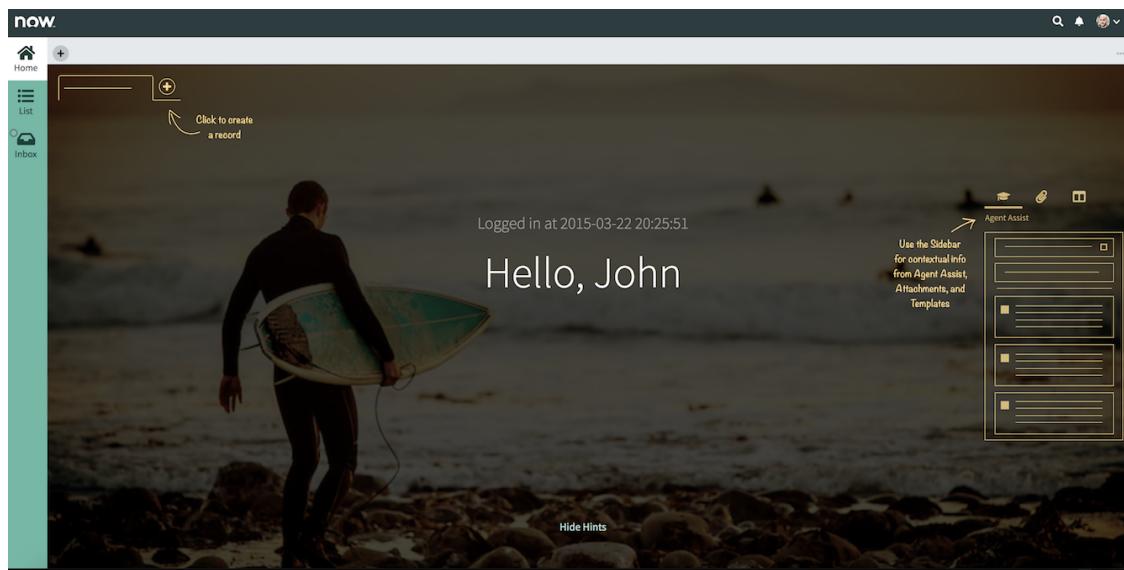
Empower agents to solve customer issues faster with machine learning

Exercise 2: Agent Intelligence for Major Issue Detection

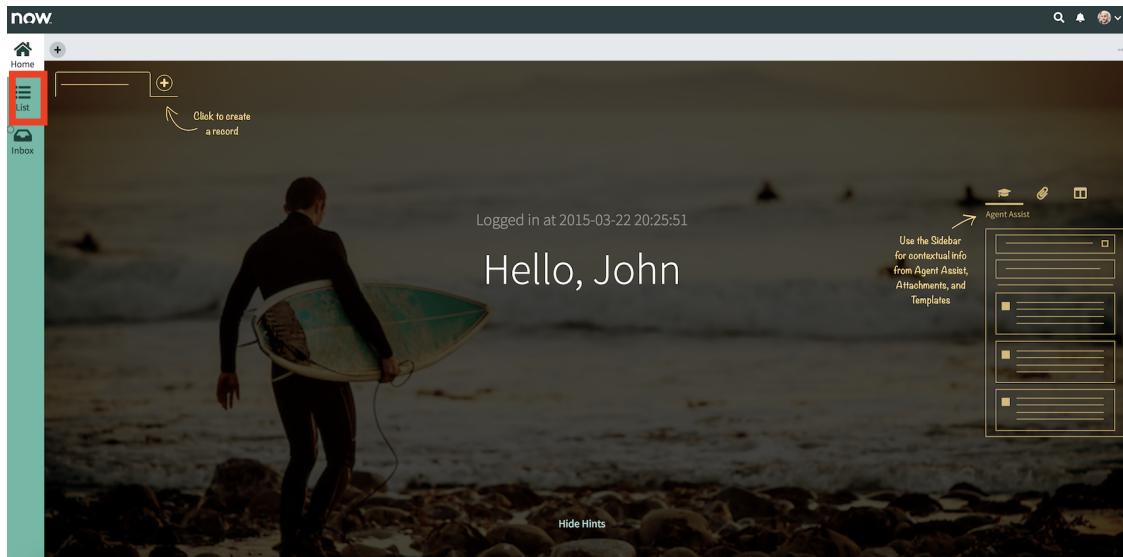
Exercise Goal

Experience first hand how Agent Intelligence automatically recommends that the agent propose a major case.

1. **Login to the Agent Workspace:** In a separate browser or Google Chrome Person, login to the agent workspace as John Jason (john.jason / Welcome1!). For quicker access, append /workspace to the URL



2. Navigate to Lists: Click on Lists to access cases



3. View Case Details: Click on the case you just created to view the case details. Dismiss any special handling notes popup.

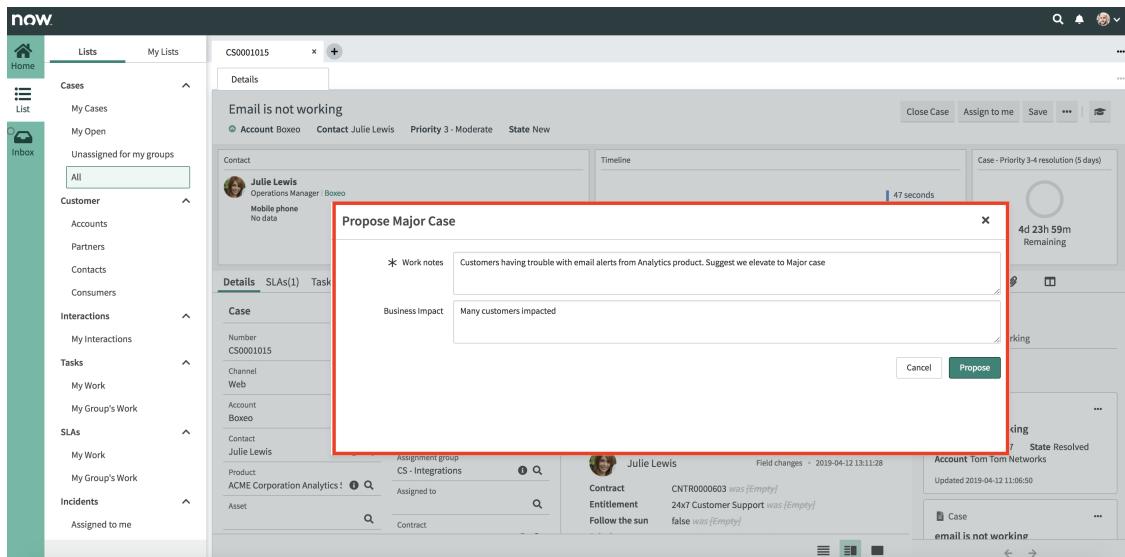
- 4. Review Agent Intelligence panel:** Review the proactive message. Agent Intelligence has identified potential widespread impact and is recommending the agent to propose this case as a major case.

The screenshot shows the ServiceNow interface with the 'now' logo at the top. On the left, there's a sidebar with categories like Home, Lists, My Lists, Cases, My Cases, My Open, Unassigned for my groups (highlighted in red), Customer, Accounts, Partners, Contacts, Consumers, Interactions, My Interactions, Tasks, My Work, My Group's Work, SLAs, My Work, My Group's Work, Incidents, and Assigned to me. The main area displays a case record for CS0001015. The 'Details' tab is selected, showing the contact information for Julie Lewis and the timeline. In the bottom right corner of the main window, there's a red box highlighting the 'Agent Intelligence' panel. This panel contains a search bar ('Email is not working'), a results section ('4 Results'), and a recommendation ('Recommendation'): 'We noticed that 13 similar cases have been created for 9 different accounts in the last 17 hours.' Below this, there's a button labeled 'Propose Major Case'.

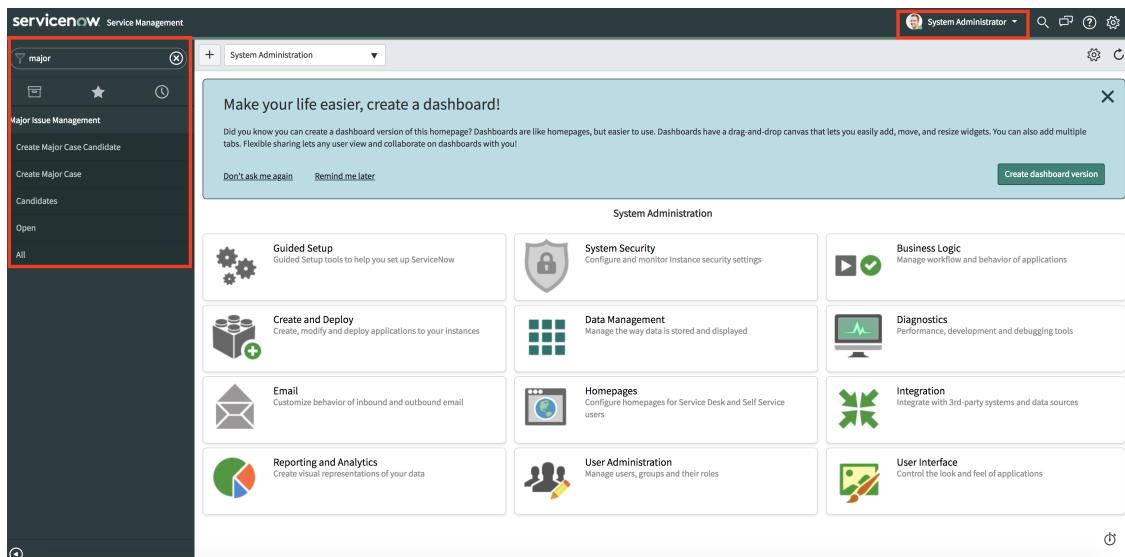
- 5. Initiate Major Case Workflow:** Click on Propose Major Case to initiate the case workflow.

This screenshot is identical to the previous one, except the 'Propose Major Case' button in the Agent Intelligence panel is now highlighted with a red box, indicating it has been clicked. The rest of the interface remains the same, showing the case details and the proactive recommendation.

- 6. Enter Major Case Notes and Impact:** Provide major case Work Notes and Business Impact and click Propose. You will see the confirmation message that the major case was proposed.



- 7. Login as Admin:** Login to the instance as admin. Search for "major" in the filter navigator. **Note:** You might have a special persona in your organization that manages Major Cases. In this lab, we are using admin.



8. View Major Case candidates: Click on Candidates to view major case candidates.

The screenshot shows the ServiceNow Service Management interface. The left sidebar has a 'major' filter and lists 'Major Issue Management' sections: 'Create Major Case Candidate', 'Create Major Case', 'Candidates', 'Open', and 'All'. The main area is titled 'Cases [Major Case view]' with a 'Search' bar. A single record is selected: CS0001014, titled 'Email is not working', with status 'Proposed'. The record details are: Contact: Julie Lewis, Account: Boero, Consumer: (empty), Channel: Web, State: New, Priority: 3 - Moderate, and Updated: 2019-05-07 01:37:43. There are buttons for 'Actions on selected rows...' and navigation arrows.

9. View Major Case Details: Click on the major case to view major case details.

The screenshot shows the ServiceNow Service Management interface. The left sidebar has a 'major' filter and lists 'Major Issue Management' sections: 'Create Major Case Candidate', 'Create Major Case', 'Candidates', 'Open', and 'All'. The main area is titled 'Case CS0001014 [Major Case view]' with a 'Follow' button. A message box says 'This is a Major Case Candidate.' Below it is the 'Timeline' section showing a single event. The 'Case Details' section includes fields: Number (CS0001014), Channel (Web), Product (ACME Corporation Analytics Suite 2016), Parent (empty), Short description (Email is not working), Needs attention (unchecked), Opened (2019-05-07 00:33:11), Priority (3 - Moderate), Assignment group (CS - Integrations), and Assigned to (empty). There is also a 'Special Handling Notes List' table with three entries: 'Changes in Entitlement' (Expires on 2023-05-05 03:12:14, Priority 4 - Low, Applies To Account), 'Urgent issue reported' (Expires on 2023-07-22 02:28:58, Priority 1 - Critical, Applies To Account), and 'VIP Account' (Expires on 2024-01-04 00:20:16, Priority 4 - Low, Applies To Account).

10. Approve Major Case: Approve the major case

The screenshot shows the ServiceNow Service Management interface. The left sidebar has a 'major' filter and lists 'Major Issue Management' sections: 'Create Major Case Candidate', 'Create Major Case', 'Candidates', 'Open', and 'All'. The main area is titled 'Case CS0001014 [Major Case view]' with a 'Follow' button. A context menu is open, showing options like 'Save', 'Create Visual Task Board', 'Create Incident', 'Create Normal Change', 'Create Problem', 'Create Request', 'Create Standard Change', 'Create Work Order', 'Approve Major Case Candidate' (which is highlighted with a red box), 'Reject Major Case Candidate', 'Metrics Timeline', 'Follow on Live Feed', 'Show Live Feed', 'Configure', 'Export', 'View', 'Create Favorite', 'Copy URL', 'Copy sys_id', 'Show XML', 'History', and 'Reload form'. The 'Case Details' section includes fields: Number (CS0001014), Channel (Web), Product (ACME Corporation Analytics Suite 2016), Parent (empty), Short description (Email is not working), Needs attention (unchecked), Opened (2019-05-07 00:33:11), Priority (3 - Moderate), Assignment group (CS - Integrations), and Assigned to (empty). There is also a 'Special Handling Notes List' table with three entries: 'Changes in Entitlement' (Expires on 2023-05-05 03:12:14, Priority 4 - Low, Applies To Account), 'Urgent issue reported' (Expires on 2023-07-22 02:28:58, Priority 1 - Critical, Applies To Account), and 'VIP Account' (Expires on 2024-01-04 00:20:16, Priority 4 - Low, Applies To Account).

- 11. View confirmation:** View confirmation message that the major case has been created.

The screenshot shows the ServiceNow Case view for record CS0001014. A red box highlights a message at the top: "New major case CS0001015 has been created and CS0001014 has been added as child." The main form displays details like Number (CS0001014), Channel (Web), Product (ACME Corporation Analytics Suite 2016), Parent (CS0001015), and Priority (3 - Moderate). Below the form is a "Special Handling Notes List" table with three rows:

Short Description	Expires on	Priority	Applies To
Changes in Entitlement	2023-05-05 08:12:14	4 - Low	Account
Urgent Issue reported	2023-07-22 02:28:58	1 - Critical	Account
VIP Account	2024-01-04 00:20:16	4 - Low	Account

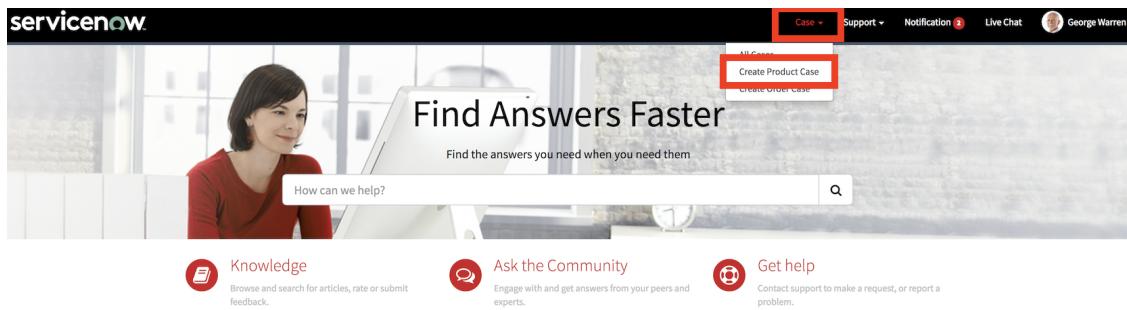
- 12. Navigate to the CSM Customer Portal:** Navigate to the CSM Customer Portal. **Note:** For quicker access, append /csm to your servicenow instance URL.

The screenshot shows the CSM Customer Portal homepage. It features a banner with a woman in a red shirt and the text "Find Answers Faster". Below the banner is a search bar with placeholder "How can we help?". On the right side, there are three navigation links: "Knowledge" (Browse and search for articles, rate or submit feedback.), "Ask the Community" (Engage with and get answers from your peers and experts.), and "Get help" (Contact support to make a request, or report a problem.).

- 13. Login to Customer Portal:** Login as Julie Lewis (julie.lewis / Welcome1!). For this lab, We're reusing Julie's login but this could be another user from her company or another customer.

The screenshot shows the CSM Customer Portal login page. It features a login form with fields for "User name" and "Password", and a "Login" button. The background shows the same "Find Answers Faster" banner and navigation links as the previous screenshot.

14. **Create a Case:** Click on Case. Then click on "Create Product Case".



15. **Submit Case:** Enter the following values: Products - select Acme Analytics Suite 2016. Subject - "Email is not working". Note that the default priority of the case is Low (do not change it). Click Submit.

Note: It is important to use this text as the machine learning model has been trained using similar data.

The screenshot shows the 'Create Case' interface. The 'Product' field is specifically highlighted with a red box, indicating it is the focus of the step. Other fields like 'Account', 'Contact', 'Asset', 'Priority', and 'Subject' are also visible but not highlighted.

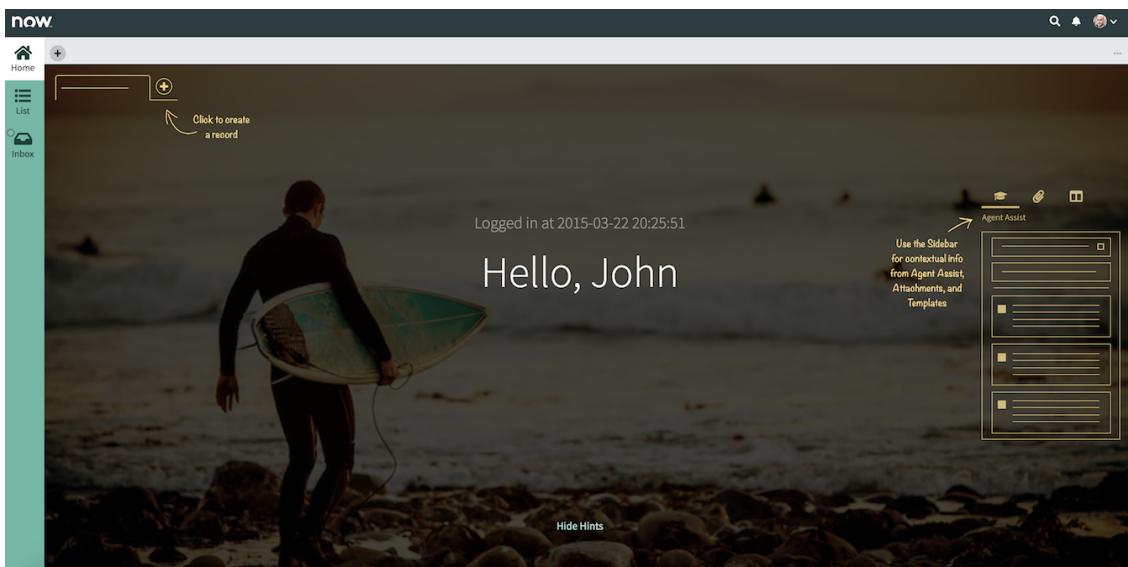
- 16. View Case Details:** View the details of the case just created.

The screenshot shows the ServiceNow interface for creating a new ticket. The main area displays a message from Julie Lewis (@ just now) about an issue with an email account. The message content is "Email is not working". Below the message is a green "Start" button. To the right, the "Case details" section provides the following information:

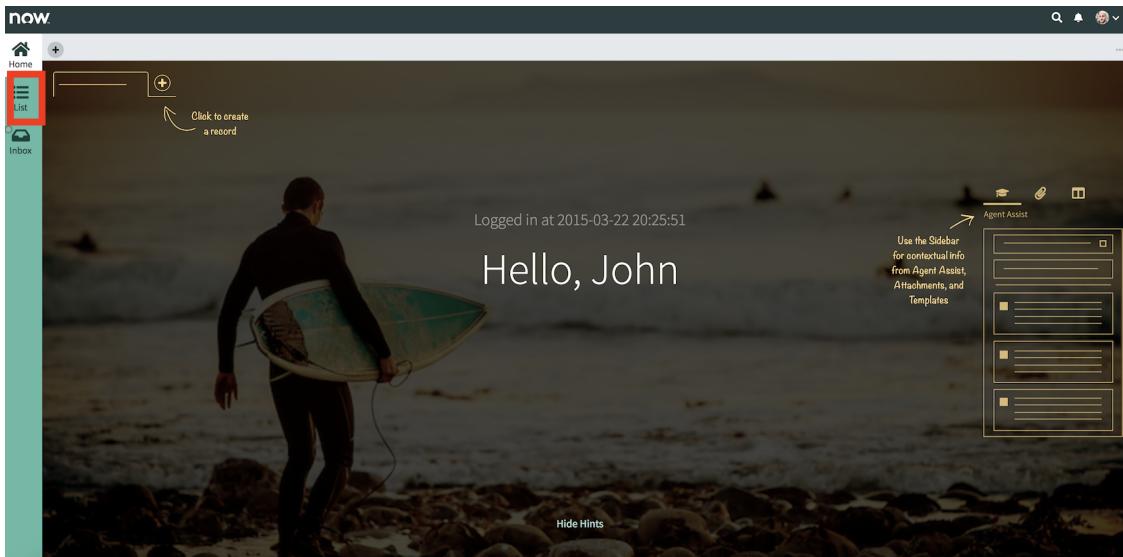
Number	CS0001018	Priority	3 - Moderate
State	New	Contract	CNTR0000603
Entitlement	24x7 Customer Support	Account	Boxeo
Product	ACME Corporation Analytics Suite 2016	Contact	Julie Lewis

Below the case details is an "Attachments" section with a placeholder for dropping files.

- 17. Agent Experience:** Now we'll login to the Agent Workspace as John Jason, a customer service agent with ACME. John helps ACME's customers like Boxeo get their questions answered or issues resolved. You'll get to see how our machine learning helps John be more productive and help Julie.
- 18. Login to the Agent Workspace:** In a separate browser or Google Chrome Person, login to the agent workspace as John Jason (john.jason / Welcome1!). For quicker access, append /workspace to the URL



19. Navigate to Lists: Click on Lists to access cases



20. View Case Details: Click on the case you just created to view the case details. Dismiss any special handling notes popups.

Number	Short description	Action status	Contact	Account	Consumer	Channel	State	Priority
CS0001015	Email is not working	(empty)	Julie Lewis	Boxeo	(empty)	Web	New	3 - Moderate
CS0000004	email server is down	(empty)	Ronald Hawes	Elegant Communications	(empty)	Phone	Awaiting Info	1 - Critical
CS0000063	my email is not working	(empty)	Alex Linde	Advanced Routing Components	(empty)	Web	New	4 - Low
CS0000117	email is not working	(empty)	(empty)	Tom Tom Networks	(empty)	Web	Resolved	4 - Low
CS0000716	Charging repeatedly	(empty)	(empty)	(empty)	(empty)	Phone	New	3 - Moderate
CS0001010	Router limiting telepresence performance	(empty)	Alex Linde	Advanced Routing Components	(empty)	Web	New	1 - Critical
CS0001312	Since the upgrade, the priority field in Servic...	(empty)	(empty)	Boxeo USA	(empty)	Web	Resolved	4 - Low
CS0001777	Unable to connect to email	(empty)	(empty)	Advanced Routing Components	(empty)	Web	Closed	4 - Low
CS0002031	SAP Materials Management is slow or there i...	(empty)	(empty)	Diagonal Inc.	(empty)	Web	Open	4 - Low
CS0002295	Questions regarding Email notifications	(empty)	(empty)	Boxeo France	(empty)	Web	Open	4 - Low
CS0002315	Rain is leaking on main DNS Server	(empty)	(empty)	Advanced Routing Components	(empty)	Web	Resolved	4 - Low
CS0002342	UX SME Survey homepage not working as ex...	(empty)	(empty)	Boxeo France	(empty)	Web	Resolved	4 - Low
CS0002368	We recently upgraded our test (https://imfies...	(empty)	(empty)	Advanced Routing Components	(empty)	Web	Resolved	4 - Low
CS0002376	AUTOMATION: migration resize of ornidev fai...	(empty)	(empty)	Unity System	(empty)	Web	Resolved	4 - Low
CS0003405	Seeing a lot of these in all environment logs ...	(empty)	(empty)	Spark Technologies	(empty)	Web	Resolved	4 - Low

21. View Major Case Associated with this case: You can now see that the system tells you a major case exists.

1. Link to Major Case: Click on "Link to this Major Case" to link the current case to existing Major Case

1. **View Confirmation:** View confirmation message that the case has been linked to the existing major case

The screenshot shows the Microsoft Dynamics 365 Customer Service application. On the left, there's a navigation bar with sections like Home, Lists, My Lists, Cases, Customer, Accounts, Partners, Contacts, Consumers, Interactions, Tasks, SLAs, and Incidents. The main area displays two cases: CS0001015 and CS0001016. Case CS0001016 is highlighted. A red box highlights a message in the top right corner of the case details pane: "CS0001016 has been linked to the major case CS0001015 as a child." Below this, the case details are shown, including contact information for Julie Lewis and a timeline section.

2. **Summary:** In this exercise, you saw how Agent Intelligence makes it really easy for a customer service agent to respond to Major Issues impacting multiple customers and resolve customer issues faster.