

ESCALATING CRM CASES TO MANAGED SERVICES (FOR TIER 3)

Purpose

In order to ensure uniformity, consistency, and fewer errors in the escalation of CRM cases to Managed Services (or in some cases Service Assurance), the following procedure has been established. This procedure most commonly impacts Tier 3 Help Desk staff.

Logging into CRM



Before beginning any steps below, navigate to <https://myohio.oaks.ohio.gov> and log in with your OAKS User ID and password.

Step-by-Step	Screen
1. Click Launch Application link in the Customer Relations Management row of the OAKS Quick Access section.	 The screenshot shows the 'OAKS Quick Access' section of a web application. It features two rows of application tiles. The first row is 'Business Intelligence' with a 'BI Home' link. The second row is 'Customer Relations Management' with 'CRM Home' and 'Launch Application' links. The 'Launch Application' link is highlighted with a red rectangular box.

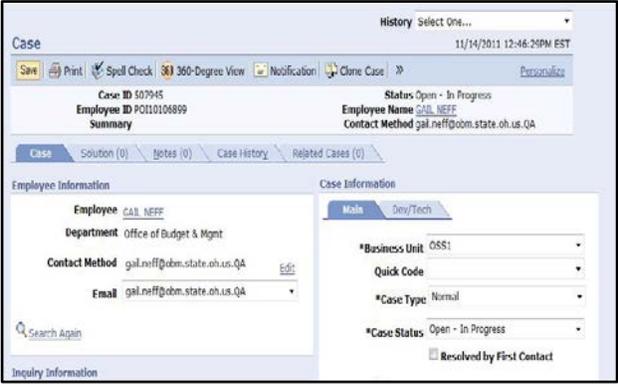
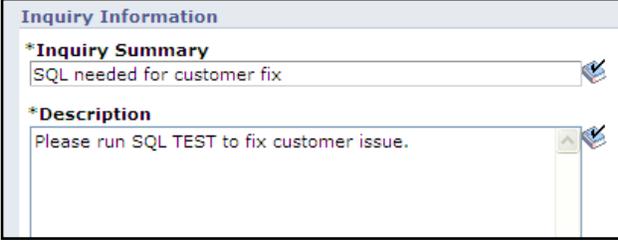
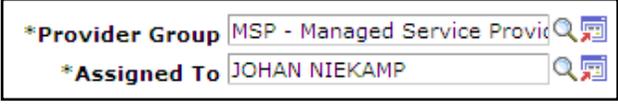
The OAKS Customer Relations Management (CRM) screen will display.



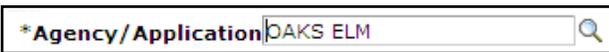
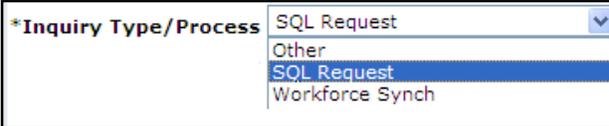
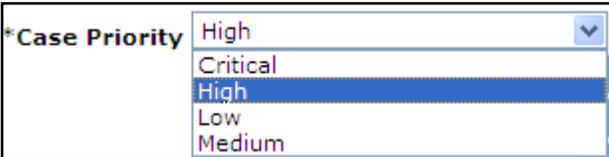
Follow these steps if your existing CRM case must be escalated to Managed Services, whether to seek assistance in running a process or for more complicated application concerns.

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Escalation of an Existing Case to Managed Services

Step-by-Step	Screen
<p>2. Open a new case in <u>your name</u>.</p> <p>You will need to <u>relate</u> the new case to the existing case that you determine should be escalated to Managed Services. Be sure to have the case number of the existing case handy.</p> <p> Do NOT simply re-assign the existing case to Managed Services. You must open a new case.</p>	
<p>3. Type in the appropriate information in the Inquiry Summary and Description fields.</p>	
<p>4. Select the “MSP-ALL (MSP Managed Service Providers (All))” Provider Group from the drop-down menu of the Provider Group field.</p> <p> Note The HRD ART team should choose one of the following Provider Groups:</p> <ul style="list-style-type: none"> • “SAT-HCMADM” (for administrative requests) • “SAT-HRDENH” (for enhancement requests) 	
<p>5. Select the appropriate contact at Managed Services (or Service Assurance for the ART team) for the Assigned To field.</p>	

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<p>6. Choose the appropriate application for the Agency/Application field.</p> <p> Note Cases that need to be escalated to Managed Services are almost exclusively application-related (as opposed to pertaining to a specific agency).</p>	
<p>7. Select the appropriate value for the Service/Module field.</p>	
<p>8. Select the appropriate value for the Inquiry Type/Process field.</p>	
<p>9. The Case Priority field requires some analysis.</p> <p> Please refer to the “Priority Level Matrix” below.</p>	

Priority Level Matrix

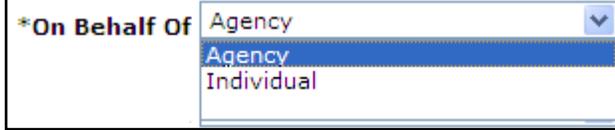
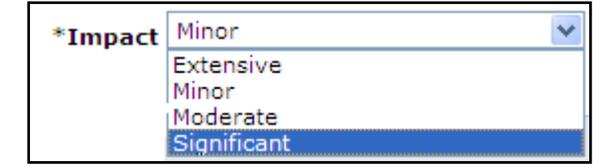
PRIORITY LEVEL	INDICATORS	EXAMPLES
<p>1 – Critical</p> <p>A problem which renders a critical business system or critical component of a business system inoperable (e.g. nothing works), causes a significant and ongoing interruption to the end-user’s business activities or causes an unrecoverable loss or corruption of data. No work around exists.</p>	<ul style="list-style-type: none"> • High visibility • Large number of orders or customers affected • Affects online commitment • Production or cycle stopped - priority batch commitment missed • Major impact on revenue • Major component not available for use • Many or major files lost • Major loss of functionality • Problem cannot be bypassed 	<ul style="list-style-type: none"> • Major network backbone interruption without redundancy • Environmental problems causing multiple system failures • Large number of service or other work order commitments missed • FINPRD, FINQAS, FINTST, FNPR2* offline or batch down • HCM offline or batch down • EPM offline or batch down

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	<ul style="list-style-type: none"> • No viable or productive work around available • Critical Impact on revenue (Income Tax and Education Foundation Payments or CRISSE) 	<ul style="list-style-type: none"> • CRM online or batch down • ELM offline or batch down • Payroll is not processing • AP checks are not processing • Large volume CRISSE file (CRIS-E, recur-8, CRIS-8) file is not processing • Tax – Income Tax and Education Foundation Payments file is not processing • Possible Security Breach <p>*During training sessions</p>
<p>2 – High</p> <p>A problem which causes a critical business system or a critical component of a business system to be inoperative, disrupted or malfunctioning and which materially interferes with the use of the system (e.g., some things work). No work around exists.</p>	<ul style="list-style-type: none"> • Moderate visibility • Moderate to large number of order or customer affected • Potentially affects online commitment • Serious slow response times • Serious loss of functionality • Potentially affects production - potential miss of priority batch commitments • Limited use of product or component • Component continues to fail - intermittently down for short periods, but repetitive • Major access down but a partial backup exists <p>Critical impact on revenue</p>	<ul style="list-style-type: none"> • Frequent intermittent logoffs • Service or other work order commitments delayed or missed • Tumbleweed down • UC4 down • DataStage down • FIN on-line or batch degraded • HCM on-line or batch degraded • EPM online or batch degraded • CRM online or batch degraded • ELM online or batch degraded • Tzx06 – property Taxes and JFS Medicaid Payments to Provider not processing
<p>3 – Medium</p> <p>Any problem in the system which causes the system not to function in accordance with applicable specifications, including documentation, but which causes only a minor impact on the use of the system. No work around exists</p>	<ul style="list-style-type: none"> • Low to medium visibility • Low order or customer impact • Low impact on revenue • Limited use of product or component • Single client device affected • Minimal loss of functionality • Problem has workaround or redundancy in place – workaround must be acceptable to the customer • Automated workaround in place and known – workaround must be acceptable to the customer 	<ul style="list-style-type: none"> • Equipment taking hard errors, no impact yet • System defects/bugs

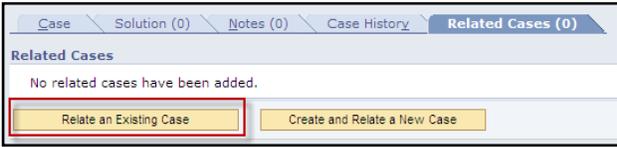
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<p>4 – Low</p> <p>Any problem in the system which causes the system not to function in accordance with applicable specifications, including documentation, but which causes only a minor impact on the use of the system and for which an acceptable work around is available.</p>	<ul style="list-style-type: none"> • Low or no visibility • No direct impact on customer • Few functions impaired • Problem has workaround - workaround must be acceptable to the customer • System resource low – no production impact • Preventative maintenance request 	<ul style="list-style-type: none"> • Any events that do not impact production end-users. • System backups not functioning • Accenture Delivery Toolset (i.e., ITSM/SMS, SET, etc) not functioning • Remote support team (viz., Cincinnati, Atlanta and San Antonio locations) network issues • System Management components (e.g., Operations servers, Oracle Enterprise Manager) not functioning • Disaster Recovery issues (e.g., production to DR sync not functioning, DR hardware down) • High-availability components (i.e., Oracle Real Application Cluster, Hewlett-Packard Service Guard, Veritas Cluster Filesystem, etc) not functioning, but all other application components functioning • Phire Architect not functioning • Non-production components (e.g., Solix, Oracle Data Masking) not functioning
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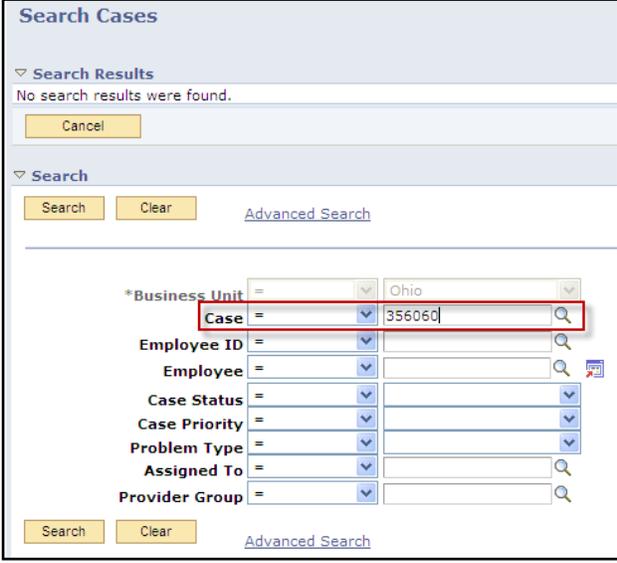
<p>10. Select the appropriate value for the On Behalf Of field.</p>	
<p>11. The Impact field requires some analysis.</p> <p> Please refer to the “Impact Matrix” below.</p>	

Impact Matrix

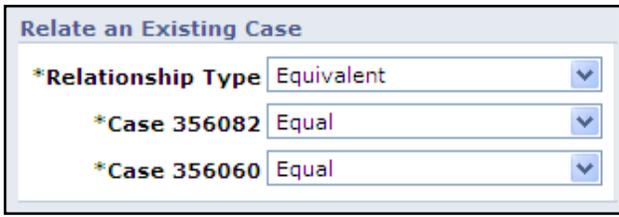
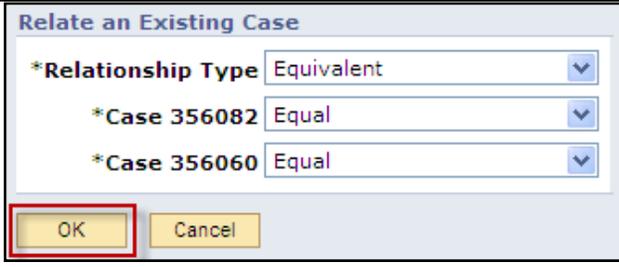
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12. Select the appropriate value for the Channel field.	
13. Click the Related Cases tab.	
14. Click the Relate an Existing Case button. You will be asked to click OK to continue this process.	

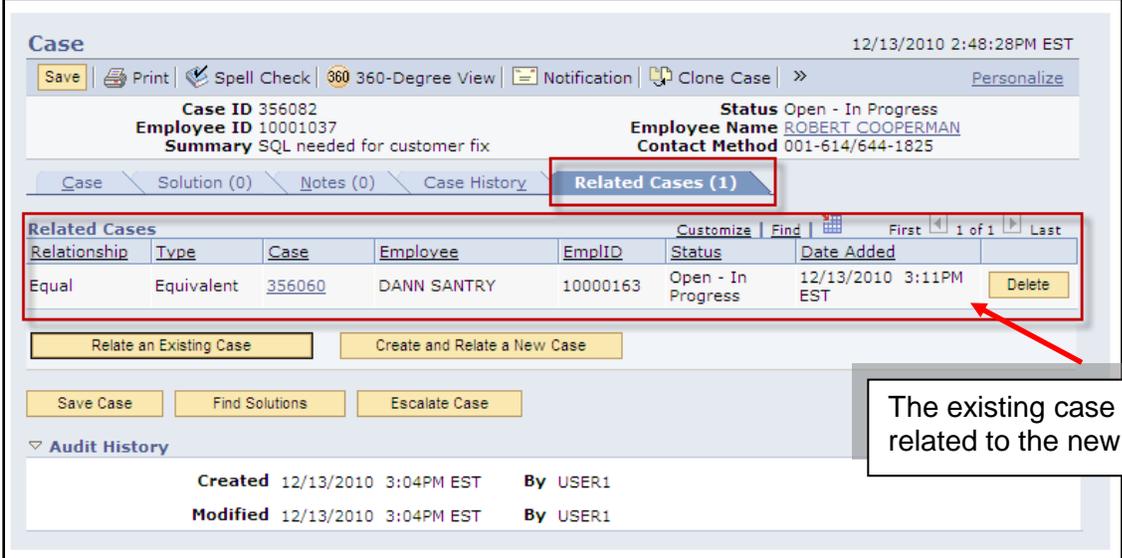
Impact	Description	Measurement
1 - Extensive	All users impacted	All core users (does not include tech admin or HCM ePay users) of a single application
2 – Significant	Many users impacted	All users in a single central agency (viz., OBM, GSD or HRD)
		All users in multiple non-central agencies
3 – Moderate	Some users impacted	All users in a single non-central agency
		Multiple users across multiple agencies
		Multiple users in a single central agency
4 – Minor	Very few users impacted	Individual
		Multiple users within a single agency

15. Search for the existing case you wish to relate to the new case. Click Search .	
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<p>16. Click on the link of the existing case number. The Relate Existing Case window opens.</p>	
<p>17. Choose the following values:</p> <ul style="list-style-type: none"> • Relationship Type = “Equivalent” • Case XXXXXX (new case) = “Equal” • Case XXXXXX (existing case) = “Equal” 	
<p>18. Click OK.</p>	

The Case page redisplay with the related case details:



The existing case is now listed as related to the new case.

<p>19. Click Save Case.</p>	
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Note The new case will be worked by Managed Services (or Service Assurance). Once resolved, you will have to close the original case and the escalated case (if Managed

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Services has not already closed that case). This should be done only after sufficient testing has occurred to ensure the “fix” implemented by Managed Services has worked.



The information you entered in the **Case Priority** and **Impact** fields will determine the priority of the new case for Managed Services (or Service Assurance). They will follow this matrix to make that determination:

		Impact			
		1 – Extensive	2 – Significant	3 – Moderate	4 – Minor
Case Priority	1 – Critical	Priority 1	Priority 1	Priority 2	Priority 4
	2 – High	Priority 1	Priority 2	Priority 3	Priority 4
	3 – Medium	Priority 2	Priority 3	Priority 3	Priority 4
	4 – Low	Priority 4	Priority 4	Priority 4	Priority 4

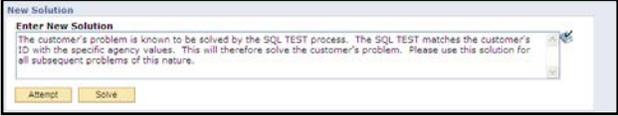
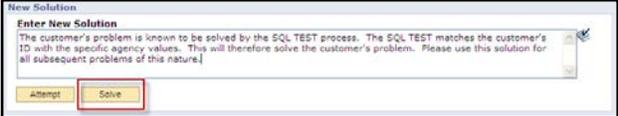
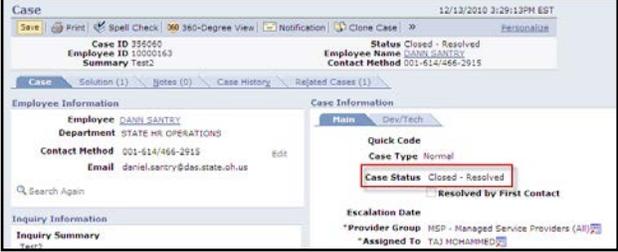
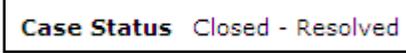
In the example above, you gave the new case a **Case Priority** of “High” and an **Impact** of “Significant.” Based on the matrix above, your new case would rate a Priority 2.

It is possible to have your **Case Priority** and **Impact** decisions overruled by Service Assurance. You need to take your best and most educated guesses when populating those fields, using the matrixes above.

Closing the Existing Cases (after testing is successful)

Step-by-Step	Screen
1. Open the <u>original</u> case.	
2. Click the Solution tab.	

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<p>3. Type a detailed solution in the Enter New Solution field.</p>  <p>It is important that your solution be specific and detailed, providing the reasons for the implementation of this solution. Remember that your solution may be read and used by other Help Desk/Contact Center staff members. A specific and detailed solution will help that person solve a similar case in the future.</p>	
<p>4. Click the Solve button.</p>	
<p>5. You will return to the Case page. Click the Save button.</p>	
<p>The case is now resolved and closed.</p>	
<p>6. Click the Related Cases tab on the closed case.</p>	
<p>7. Click the link to the related case, which you will now close (unless already closed by Managed Services).</p>	
<p>8. Close the case (refer to Steps 2-5, above).</p>	

Questions? Please contact Christy Bickerstaff at 614-338-4769 or christy.bickerstaff@obm.state.oh.us.