Requesting Help During Delivery of an Assigned Task

02/27/2024 2:56 pm EST

Contents

Purpose

During the course of providing installation, training, and/or consulting services for a customer, the resource assigned to perform a task may run into a roadblock executing the task that requires assistance from another department to help resolve. In some cases, a quick call is all that is necessary to resolve the issues. These types of calls should be documented in the Chatter section of the assigned task.

For all other issues that require more detailed assistance outside of Professional Services that cannot be resolved with a quick call, a case will be created. This provides the following benefits:

- Full tracking of the issue to ensure the issue is not lost or resolution delayed
  - Full details regarding case status and resolution
  - Visibility for the PM to gauge project timeline impact/changes
- Ability to escalate issues as necessary
- Visibility for assisting team and leadership
  - Gauge volume for capacity planning
  - Future process/product improvements
  - Training opportunities

This process outlines the steps required for requesting help and tracking all activity/conversations regarding the issue through resolution.

Return to Contents

Requesting Help

It is the responsibility of the resource assigned to deliver the task to create a case when assistance is needed to resolve a problem. They have the knowledge required to correctly communicate the issue and the ability to work directly with the resources assisting to resolve the problem.

The resource is responsible for following through with the case to resolution. PMs can assist with escalating and driving scheduling as necessary.

The following steps will be used to create a case:

1. Open the customer card and select Cases
2. Select New Case
3. Enter the customer contact information
4. Enter your name as the Secondary Owner of the case
5. Subject: Summary of issue
6. Description: provide full details on the issue including any screenshots
7. Update the Impact field
8. Update the Priority field
9. Save the case
10. Open the case
11. Select the Add Products tab and enter the appropriate product. The Sub Product field can be left blank
12. Change the Owner
    a. Select the drop-down next to the icon and select Queues
    b. Select one of the appropriate queues :
        i. Support L1 (for product impacted)
        ii. For product issues cases, do not change the owner. Click Transfer button and selectTriage in the Transfer To field
13. Ongoing discussions - Update the case activity with all discussion notes.

a. Phone call – enter all notes regarding the discussion

b. Non Phone call – use @mention instead of emails to document all conversations with assisting resources and responses.

  i. Any email discussions will need to be copied into the case

Return to Contents

Updating the Project

Once the case is created, the project task should be updated as follows:

1. Update the project task Chatter notes:

   a. Hyperlink the case number

   b. Enter the time delivered on the task so far

   c. Add estimated time required to complete task and date (if known)

   d. @mention the PM

   e. Close the task

2. The PM will schedule a new task to complete the work based on the information above once the issue is resolved.

Return to Contents

Transfer a Case to Development

All cases must route through the Triage team to ensure proper process and customer notification flow is not disrupted. The Triage Team will review the case and update it as necessary to ensure it is ready for the next stage of the process. Bypassing this step will also bypass the automated customer notifications that keep the customer informed of the status of their request.

To assign to the Triage Team, after creating the case:

1. Update the Steps to Reproduce Issue/Error field with customer information:

   a. Copy the list from the Bug Submission Template and paste into the field

   b. Populate each item with information gathered from the customer

2. Confirm the Product field is populated

3. Click the Transfer button

4. Transfer To field - select Triage

5. Click Save

If you are instructed to bypass this step, please notify the requester you must follow the process to ensure proper process is followed and the case is handled appropriately.

Return to Contents