AGGIESERVICE

Best Practices for Service Providers

Setting up

- **Create custom list views**
  - Accuracy with filters is vital. The filters you choose will determine what displays in the list views you create. Give your views detailed names, like "Alex's Open Cases" and "Alex's Cases in the Team Queue".
- **Email Settings**
  - Go to My Settings and change your return email address to aggieservice@ucdavis.edu. If you send an email out of AggieService, this will ensure that the reply makes it back into the case.
  - Also, under My Settings, turn off the BCC notifications. And add your email signature.

Working the Cases

- **Check your Queue often**
  - Remember: the queue contains cases that are not yet owned by an actual person.
- **Reassign your case to yourself before you begin working on it**
  - Cases that receive updates while assigned to a queue send notifications to everyone who has access to the queue!
- **Change case status to "In Process" after you assign it to yourself**
  - This will let your submitter know that you have received the case. When the work is complete, remember to change status to "Closed".
- **Make sure the submitter belongs to one of your departments**
  - AggieService uses Home Department Codes to route work: be certain that the submitter belongs to a department that you service.
- **Update the *Short Description***
  - Case submitters are not able to view *short description* (or Internal only comments). You could add the short description field to a list view and use it to quickly identify cases.
- **Feed the Feed!**
  - Be sure to update information regarding the case in the feed! Be sure to @mention the submitter or point of contact if you want them to receive an email notification.
- **Fill in the resolution box when completing a case**
  - If your clients want to find out what was completed without needing to review all the details, they would look for a summarized resolution. Hitting the 'Close Case' will send the resolution notes with the closed case notification.
- **Document, document, document!**
  - Be sure to document in the feed any case detail changes you make. Not all detail changes are tracked in the case activity. However, submitters cannot edit the case.
- **Misrouted Cases**
  - If the work does not belong in your service channel, assign it to the SSO Operations Queue. Only if you are 100% certain, should you assign the case to any other queue. Please feel free to call the SSO Service Desk for questions regarding misrouted cases.
- **Search Function**
  - Use the search function to look up info such as case numbers, affected employees, and email content. Your results are based on what cases you have visibility to.