

Escalation tools

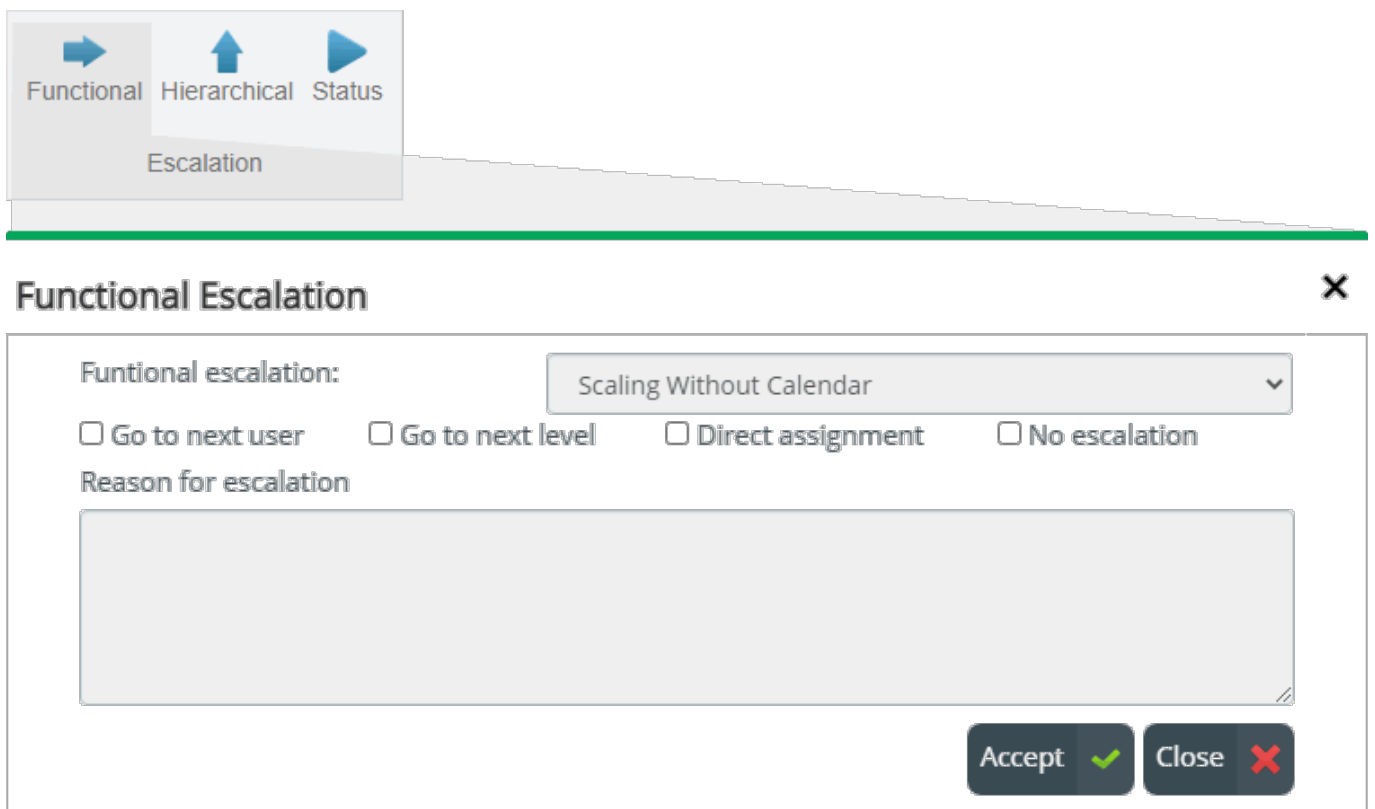
Allows the case to be escalated to different advisor ¹⁾ and/or informed manager. Escalation types:

- [Functional Escalation](#)
- [Hierarchical Escalation](#)

Functional Escalation

Escalate the case from one handler to another, taking into account the group and level.

1. In the *case attention console*, click on the **Functional** button, the escalation options window will open:



Escalation options	Description
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Functional Escalation (Type)	Preselected escalation type according to the SLA configuration assigned to the case: Scaling without calendar: The case is escalated without taking into account the calendars configured in the advisor role. Scaling with Calendar: The case is escalated considering the calendars configured in the advisor role. Scaling Disabled: The case will not be escalated.
Escalation Options	Mode in which the escalation will be performed: Go to the next user: The case is escalated to the next advisor of the same functional group ²⁾ and same current level. Go to the next level: The case is escalated to the first advisor of the configured group at the next level. Direct assignment: The new advisor is directly selected and may belong to any of the groups configured in the levels of the service model. With this option a search field and the list with all the available advisors will be displayed. No escalation

Functional Escalation



Functional escalation: Scaling Without Calendar

Go to next user Go to next level Direct assignment No escalation

Users

1 (6)UsrSrvDsk3 30 100 Enter in this field the search criteria (name, group)

- 1 (4)UsrSrvDsk1 30 100
- 1 (6)UsrSrvDsk3 30 100 ✓
- 1 (7)UsrSrvDsk4 30 100
- 2 (12)Usr2lvlIncidGroup1 60 100
- 2 (13)Usr2lvlIncidGroup2 60 100
- 3 (14)UsrIcdSr1 70 100
- 3 (15)UsrIcdSr2 70 100

2. Once the escalation options have been selected, enter a reason for the action and click on the **Accept** button to make the escalation effective.

Hierarchical Escalation

Escalate the case from one manager informed to another, taking into account the group and level.

1. In the *case attention console*, click on the **Hierarchical** button, the escalation options window will open:

Escalation options	Description
Functional Escalation (Type)	Preselected escalation type according to the SLA configuration assigned to the case: Scaling without calendar: The case is escalated without taking into account the calendars configured in the manager role. Scaling with Calendar: The case is escalated considering the calendars configured in the manager role. Scaling Disabled: The case will not be escalated.
Escalation Options	Mode in which the escalation will be performed: Go to the next user: The case is escalated to the next manager of the same functional group ³⁾ and same current level. Go to the next level: The case is escalated to the first manager of the configured group at the next level. Direct assignment: The new manager is directly selected and may belong to any of the groups configured in the levels of the service model. With this option a search field and the list with all the available managers will be displayed. No escalation

2. Once the escalation options have been selected, enter a reason for the action and click on the **Accept** button to make the escalation effective.

1)
handler

2) ,
3)
Advisor group according to the model

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