INFORMATION TECHNOLOGY SERVICES

MYFSU SERVICE CENTER

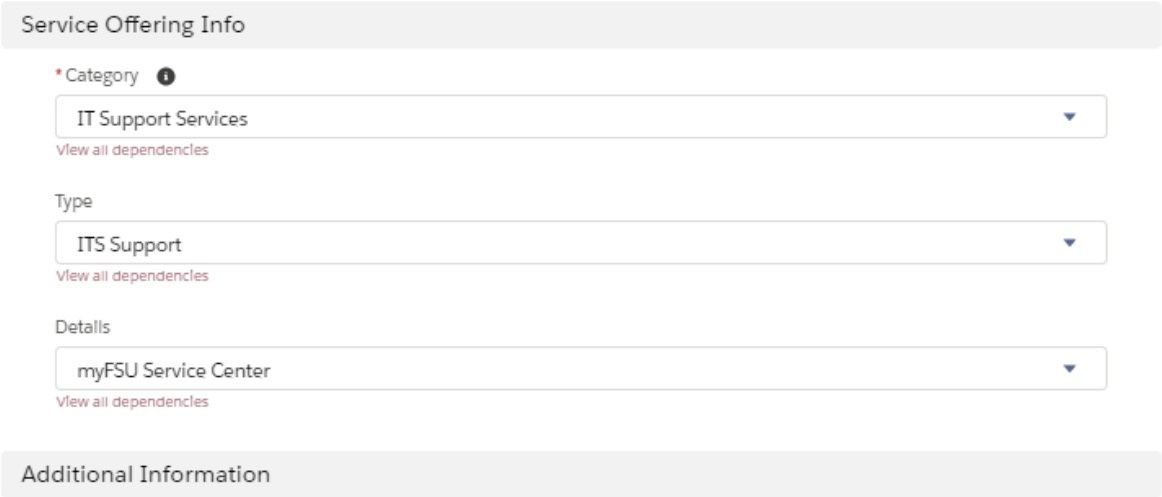
Case Management Overview

TRAINING GOALS

- Learn case features from case intake to case closure.
- Learn how to communicate with our customer/consumer and with other agents.

POST TRAINING

- For questions after the training session, create a case in myFSU Service Center and assign:
  - **Category** - ITS Support Services
  - **Type** - ITS Support
  - **Detail** - myFSU Service Center



AGENDA

- Case Intake, Assignment and Routing.
- Case Management Overview.
- Creating, Owning and Working a Case.
- Collaborating with Customer/Consumer.
- Collaborating Internally on a Case.
- Case Closing and Reopening.
- Additional Information.
- Next Steps.

CASE INTAKE, ASSIGNMENTS AND ROUTING

CASE INTAKE OVERVIEW

Web to Case

- Customers can submit cases by going to myFSU Service Center community site (servicecenter.fsu.edu) and selecting “Report a Problem”.
- Web form creates a pre-filled case in myFSU Service Center.
- The **Case Owner** by default is determined based on the **Category**, **Type**, and **Detail** (CTD) selections made by consumer.
  - If the **Category** “Other” is selected it routes to the ITS-Service Desk.

Note: Case routing info for web form & internal CTD selections is available for agents under **Quick Links** on their Home page.

CASE ROUTING AND ASSIGNMENTS

- Cases are auto-routed to the queue associated with the Category, Type, and Detail selections entered upon creation.
- Once routed to a queue, agents can assign cases by updating the Case Owner.
- If a case does not have enough information for auto-routing (for example, only the Category is selected), it will be assigned to the ITS-Service Desk.

Note: Case routing info for web form & internal CTD selections is available for agents under **Quick Links** on their Home page

SERVICE OFFERING INFO AND AUTO ROUTING

- **Assign using active assignment rule** utilizes auto-routing and leverages Category, Type, and Details values to route cases to the correct Queue as the Case Owner.
- If deselected at time of submission, the agent entering the case is the Case Owner.
- Only **Category** is required.

GROUPS AND QUEUES

- A **Public Group** is created for each Queue and contains the group members that belong to the queue. Queues can be viewed in the form of **List Views**.
- Each group has a **Queue** where cases can be assigned prior to being worked by a queue member (agent).
- You can use the **List View** to see cases that belong to a Queue.
- Agents can work on any case except for Secured Cases without assigning it to themselves or another agent.

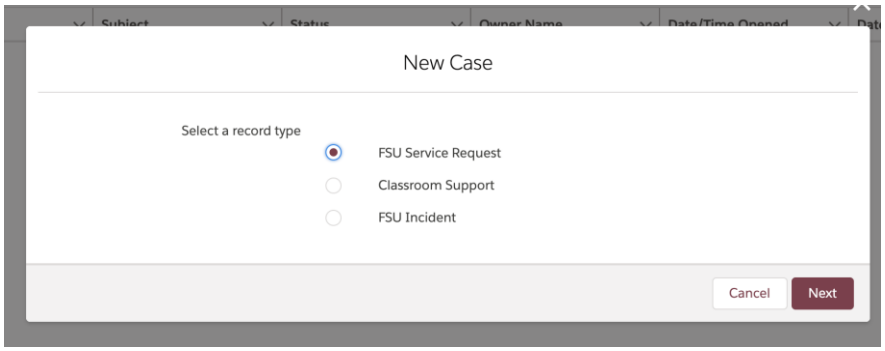
Note: Recommended best practice is to change the Case Owner from Queue prior to working a case.

CASE MANAGEMENT OVERVIEW

CASE RECORD TYPES

Case record types:

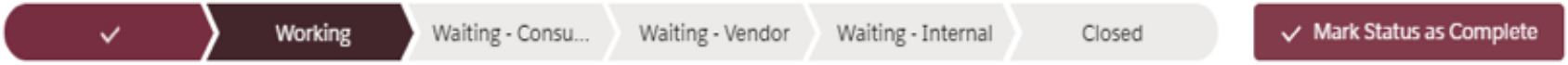
- FSU Service Request
  - “I need something”
- FSU Incident
  - “I am having or reporting a problem”
- Classroom Support
  - General problems, as well as software, training, and equipment requests for Technology Enhanced Classrooms (tecs.fsu.edu).



CONSUMER INFORMATION

- Contact information for consumer originates from data warehouse (Student Central/HR).
  - If consumer does not have FSU contact information, you can add alternate info such as name, email and phone.
  - You can search for individuals by their name, email, FSUID, etc.
  - Can add a new contact for individuals who are not in the system such as a parent, vendor, etc.
    - If as an agent you need to update your personal contact information this happens in myFSU HR.
- Preferred Contact Info.
  - Comes from consumer if web form is used.

CASE STATUS



Every Case record has a status. Status is displayed in a path component across the top of the record, with current status highlighted.

- **New:** Case has been entered but no agent has been assigned to the case.
- **Working:** The case will **automatically be changed** (from New) to Working once assigned to an agent.
- **Waiting – Consumer:** Pending information from the consumer (**manual**).
- **Waiting – Vendor:** Pending information from a vendor (**manual**).
- **Waiting – Internal:** Pending for internal reasons **(manual).**
- **Closed:** The case has been closed.

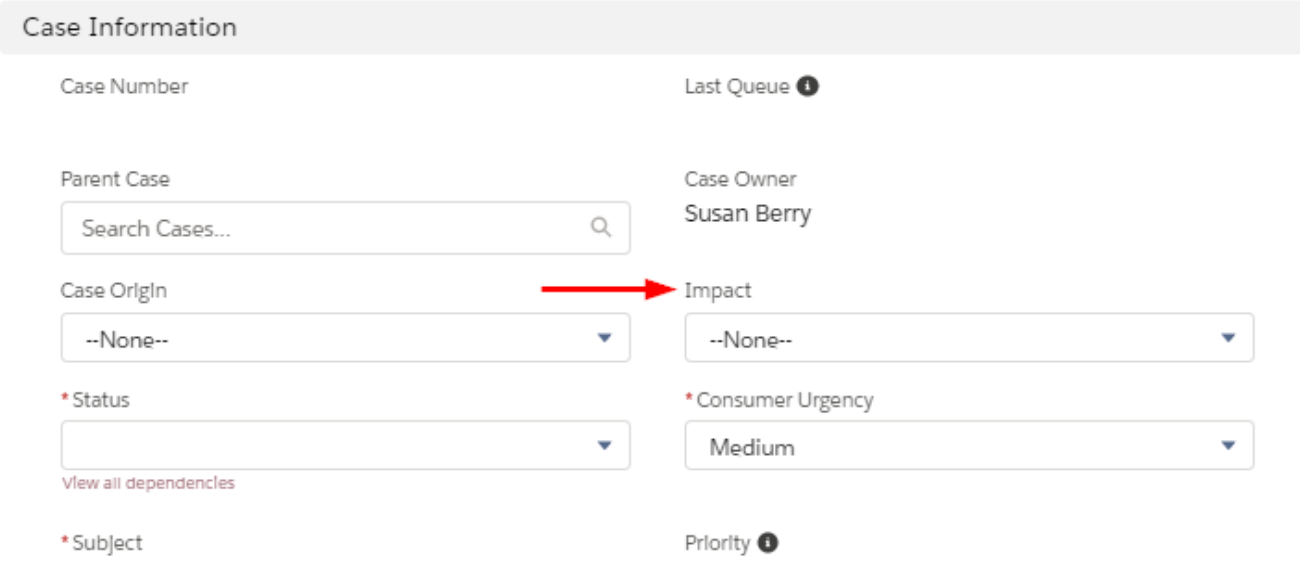
1. Open the Case to update status.
2. Along the top of the screen, note current status is highlighted, and other statuses are listed.
3. To update **Case Status,** click on desired status and click **Mark as Current Status.**
4. The status is checked and the next status is highlighted.

Main reason for Working status, is to validate that cases are reviewed and assigned.

IMPACT

Impact allows agents to select the severity of the consumer problem.

- **Critical**: Campus-wide business critical services down.
- **Major**: Campus-wide service degradation / VIP user affected.
- **Minor**: Single location degraded (2-9 users).
- **Small**: Single user affected (non-VIP).



CONSUMER REPORTED URGENCY

Priority	Description	Response Time
Low	Impacts a specific customer's ability to work for a short time. These cases are generally less time-sensitive or do not require immediate resolution.	8 business hrs
Medium	Represents problems that impact one or more customers. Does not significantly impact productivity because alternative resources or workarounds are available.	4 business hrs
High	Represents problems that impact one or more users' ability to perform normal daily tasks. Though few customers may be impacted, these problems require timely responses.	2 business hrs
Immediate/ formerly critical	Represents problems that require an expedited response. These cases may impact a large group of users or cause a significant disruption to one or more users. Customers reporting critical cases should also call the ITS Service Desk to ensure expedited response time.	Immediate – within 30 mins

CASE PRIORITY

- This is a calculated field based on a combination of consumer/customer urgency and impact based on our Incident Priority Model.
- These are the case priorities:
  - P5 - Low
  - P4 - Medium
  - P3 - High
  - P2 - Critical
  - P1 - Major Incident

Note: Priority descriptions are not listed on drop-down. View the Incident Priority Model slide in this training presentation for additional information.

HOW IS CASE PRIORITY CALCULATED?

Calculations are determined by:

Urgency + Impact = Priority

*If Impact is not selected Priority will default to P3.

- What makes a case a P1 – Major Incident?
- What makes a case a P2 – Critical?

! Note: Priority plays a bigger role with incidents than Service Requests.

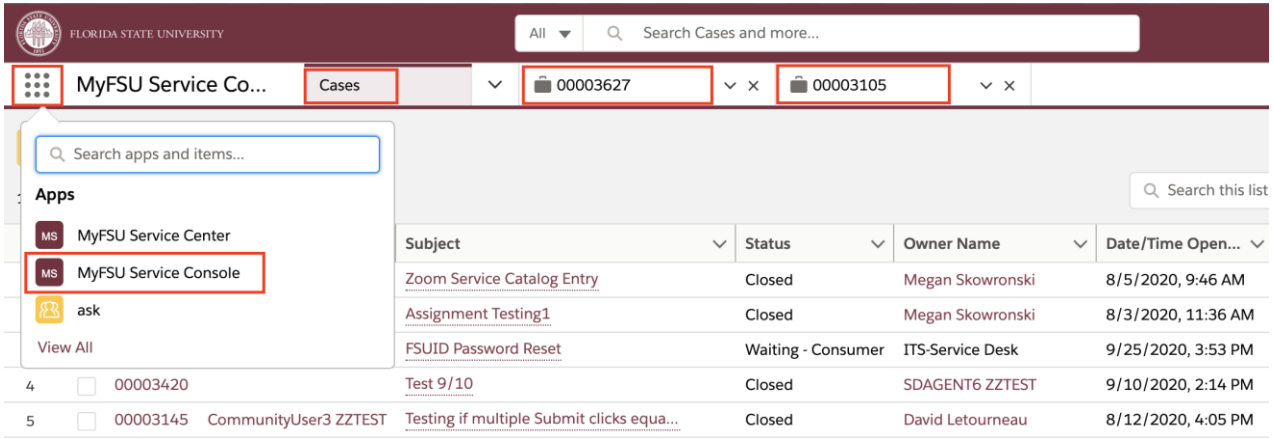
INCIDENT PRIORITY MODEL

Priority	Critical Impact Campus-wide or multiple locations' business critical service down	Major Impact Campus-wide service working, but degraded performance or function Single location's service completely down Single VIP user affected	Minor Impact Single location's service degraded 2-9 users	Small Impact Non-VIP Single user affected
Immediate Urgency No viable or complex alternative solution/workaround Significant financial/reputation risk or implications User submits "Immediate" urgency or indicates emergency on Service Desk phone call	1 Major Incident	2	3	3
High Urgency Moderately complex alternative resolution/workaround Moderate financial / reputation risk or implications User submits "High" urgency	1 Major Incident	2	3	4
Medium Urgency Easy alternative solution/workaround Failover in place Low financial/reputation risk or implications User submits "Medium" urgency	2	3	4	5
Low Urgency Easy alternative solution/workaround Failover in place Minimal financial/reputation risk or implications User submits "Low" urgency	2	3	4	5

MYFSU SERVICE CONSOLE

myFSU Service Console allows agents to have multiple cases open at once and to tab back and forth. This is like using multiple tabs on a browser.

1. Click the App Launcher on the left side of the screen.
2. Select **myFSU Service Console.**
3. Select **Cases**.
4. Click the case numbers for the cases you wish to have open.



NEXT STEPS

WHAT'S NEXT

We encourage you to:

- Visit the ITS service page for myFSU Service Center quick guides, recordings and other training documentation.
- Access additional resources under **Quick Links** on your Home page in the myFSU Service Center.
- Go to the **Knowledge** section within the myFSU Service Center to view a list of Agent Training articles.
- Be on the lookout for a monthly newsletter for agents that features myFSU Service Center tips, updates, statistics and more!

REMEMBER TO LOG QUESTIONS

- For questions after the training session, create a case in myFSU Service Center and assign:
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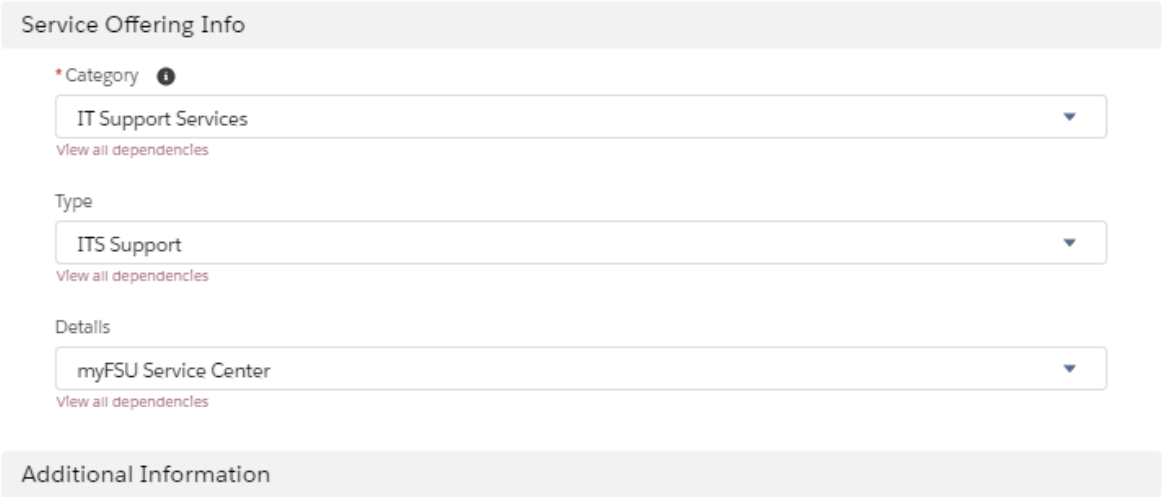

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THANK YOU