INFORMATION TECHNOLOGY SERVICES

MYFSU SERVICE CENTER

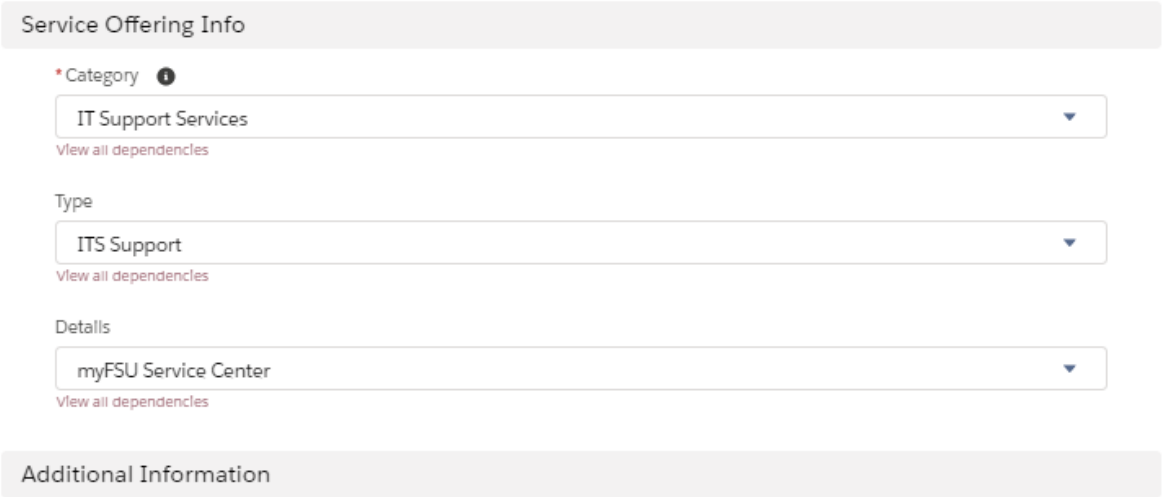
Creating, Owning, Working, and Closing Cases

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.

CREATING, OWNING AND WORKING A CASE

OVERVIEW

New Case Creation

Global Actions a.k.a. Quick New Actions

HOW TO CREATE A CASE

1. Click on **Cases** from navigation bar.
2. Click on **New Case.**
3. Select appropriate **Case Record Type.**
4. Click **Next** to access **Consumer Information.**
5. Enter **Contact Name** by searching for and selecting the contact record of the consumer in the Contact Name field.
6. Select email or phone from the **Preferred Contact Method** field.
7. Complete **Case Information** details (required fields are noted with *).
8. Enter **Service Offering Info** for **Category**, **Type** and **Detail** to route case to correct Queue.
9. Keep "Assign using active assignment rule" checkbox checked when you want it to auto-route. If you want to work the case, leave it unchecked and you will be assigned as the **Case Owner**.
10. Click **Save**. Use **Save and New** if entering multiple cases.

Notes:

- **Priority** is a calculated field. It can be viewed in the **Case Information** section and updated by changing the **Impact** and/or **Consumer Urgency** fields.
- View how Case Ownership changes from you as individual creating case to the Case Owner Queue after submission.
- Enter alternate name or communication info in **Alt Name**, **Alt Email**, and **Alt Phone** fields.

GLOBAL ACTIONS CASE CREATION

- Quick way to create a case using only essential case fields.
- Best to use when you know. the case owner and likely used by Agents with large call volume.
- Not a replacement for standard case creation.
- Unable to select **Priority** or **Impact.**
- Must add a **Category** when you close the case.

1. Click on Plus icon at top left navigation to open **Global Actions**. 
2. Select either **Quick New - Service Request**, **Incident**, or **Classroom Support.**
3. Fill in the relevant and required details.
4. Click **Save.**
5. Using this method, you can select the **Queue** the case will be routed to via **Category** and **Type.**

Note: This Queue will be overridden if Reported CTDs are filled out and the "Assign using active assignment rules" box is checked.

CASE OWNERSHIP

OVERVIEW

- Case ownership can happen at Queue or Agent level.
- By default when a case is routed via auto-routing, the case is assigned to the Queue as the Case Owner.
- Upon receipt, agents in the Queue can assign the case to themselves, another agent in the Queue, or re-assign to another Queue.

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

HOW TO VIEW CASES AND QUEUES

List views offer a variety of ways to view cases (by individual, by queue, etc.)

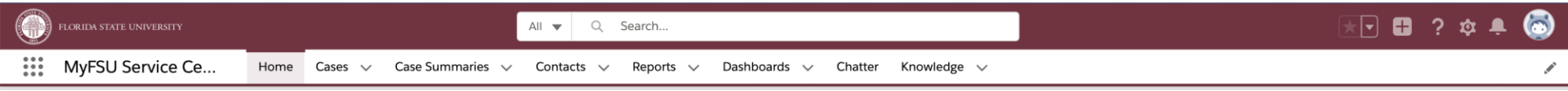
- Recently Viewed
- All Cases
- All Open Cases
- My Cases
- List by Queue name

ASSIGN A NEW CASE OWNER OR QUEUE

1. Find and click **Cases.**
2. Select a **List View** from the dropdown.
3. Locate case to assign and either:
   - Go to end of row for the case and click drop down arrow and select **Change Owner**. Changing owner also changes the Group/Queue.
   - Click on **Case Number** and go to **Case Owner** field and click on person icon to **Change Owner.**
   - Select the checkbox next to **Case Number** for one or multiple cases from the list view.
4. Choose to assign by Users or Queues, then enter and select agent or queue name.
5. Click **Change Owner.**

HOW TO SEARCH FOR A CASE

Search for a case by entering a value in the Global Search box at the top. You can search for cases by number without adding leading zeros (e.g.,000).



The following case fields are available to search using the Global search box:

- Case Number
- Description
- Subject
- Email (if entered on web form)
- Name (if entered on web form)
- Phone (if entered on web form)

Use a list view to filter on Case Number, Contact Name, Status, Classification, Queue, Case Owner, and Date/Time Opened.

CASE CLOSING AND REOPENING

CLOSE A CASE

- Each case can be closed once work efforts are completed.
- It is important to complete closing steps in this order.
- Close reason is required. The options are **Resolved on First Contact**, **Resolved**, **Not Resolved**, **No Response** or **Duplicate**.

1. Select the Case.
2. Under **Details** go to **Closing Information** section.
3. Click the pencil icon for **Case Resolution Comments** and enter a brief statement about the resolution.
4. Click **Save**.
5. Go to the Case Status bar, select **Closed**, then select "Mark Status as Complete".
6. Select the appropriate **Close Reason.**
7. Click **Done**.

Note: You can also close a case by editing the fields under **Details** in the following order:

Case Resolution Comments > **Status** (under Case Information section) > **Close Reason** > **Save**.

REOPEN A CASE

- If a consumer has a reoccurring issue related to a previous case, an agent or consumer can reopen a case that is closed.
- If consumer re-opens their case it is reassigned to Last Queue.

1. Navigate to a closed case.
2. Change the status of the case from **Closed** by either:
   - Selecting a different status option in the status bar (do not select **New**) and clicking the "Mark as Current Status" button.
   - Going to the **Chatter** tab, selecting **Reopen Case**, choosing the **Case Owner**, and clicking **Save**.
3. The case will be flagged as a **Reopened Case**. This flag persists regardless of additional status changes.

Notes:

- Agents can continue to Chatter post on a case after closure, but case comments cannot be added to closed cases.
- Cases closed more than 30 days cannot be reopened by agents or consumers.

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:
  - **Category** - ITS Support Services
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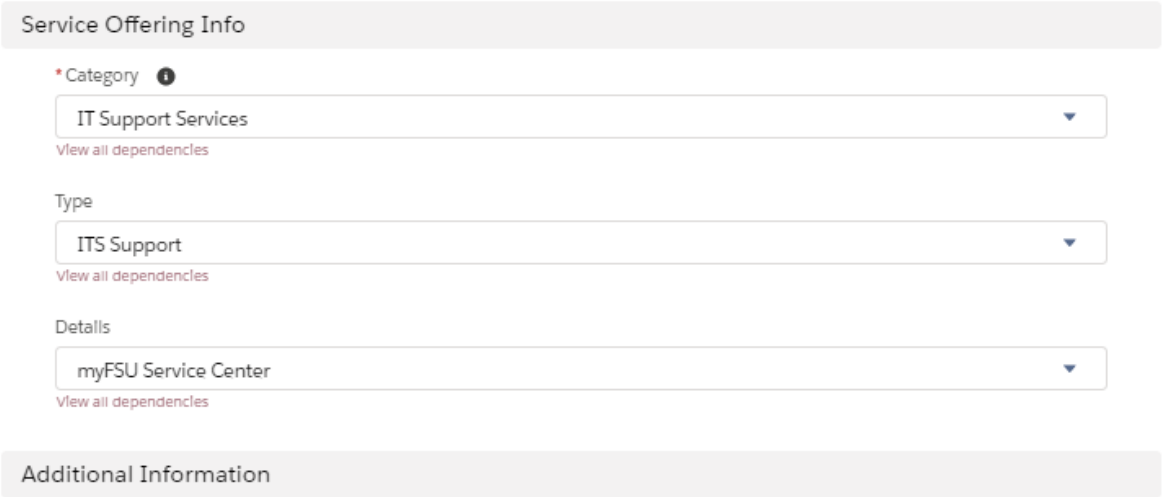

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THANK YOU