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 Case Information.
- Next Steps.
PARENT / CHILD RELATIONSHIPS
PARENT / CHILD CASES

Creating a new case within the parent:
1. Locate an existing case or create the case that will serve as the Parent case.
2. On the Related tab on a case, go to the Related Cases section and click New.
3. Select a record type then click Next.
4. Fill out the new case form and click Save.

Note: The child case is now listed within the Related Cases section of the parent case.

Relating an existing case:
1. From a case (to relate to a parent case) go to the Parent Case card.
2. Use the Search Cases field to enter or search for the number of the parent case.
3. Select the appropriate case number.

Note: The parent case’s details will appear in the Parent Case section of the child case.

- This relationship allows for cases to be all related to one overarching case.
- For example:
  When a scheduled maintenance / outage is going to occur with a service, the service provider can create a parent case so if any users report an outage, agents can relate to it with child cases.
CLOSING A PARENT CASE TO CLOSE ALL RELATED CASES

Once the issue with the cases are resolved, an agent can close the parent case to close all child cases.

1. Open the parent case record for which you want to close multiple child cases.
2. In the upper right-hand corner, click the **Close child cases** button.
3. Review the information of the child cases, then click **Next**.
4. Click the **Close reason screen** dropdown to select the Close Reason for the parent case, enter any resolution comments to appear on the parent case, then click **Next**.
   
   ![Note: All associated child cases will be closed with closed reason, ‘Closed by Parent.’](image)

5. Click **Next**, then click **Finish** to close the parent case and all associated child cases.
SECURED CASE

- Certain provider groups have use cases for creating confidential cases and thus will create a **Secured Case**.
- Cases marked as a **Secured Case** restrict visibility of the case to the limited individuals within the role and who are members of the Queue that the case belongs to.
- Agents not in the Queue are unable to view case records marked as secure within that Queue.
- However, all agents have access to the related “Case Summary” record and can view a subset of case fields: **Priority**, **Status**, **Case Number**, and **Case Type**.

To secure an existing case:

1. Open the **case record** that you want to mark as secured.
2. Under the Details tab, scroll down to the **Additional Information** section.
3. Check the box next to **Secured Case**.
4. Click **Save**.
CASE SEARCH - WITHOUT SECURE ACCESS

- When using the Global Search Bar to search for secured cases you do not have access to, the search results will not show the case record.

- If searching a case using its Case Number and only Case Summary result appears, this indicates that the case is Secured to a Queue of which you are not a member.
UNSECURE A CASE

To unsecure a case:

1. Open the case record to change.
2. Under the Details tab, scroll down to the Additional Information section.
3. Click the pencil icon next to Secured Case to edit.
4. Remove checkmark next to Secured Case.
5. Click Save.
MANDATED CASE
MANDATED SERVICE REQUESTS

1. Create a case (be sure to select “FSU Service Request”).
2. Under the Detail tab, scroll down to the Additional Information section.
3. Click the Mandated checkbox.
4. Click Save.
5. At the top of the case detail page, you will notice text indicating that “This is a mandated case”.

Agents have a visual indicator when a case is government-mandated.
Reports and list view filters can be used to identify mandated requests.

Note: The functionality for Mandated Cases only exists for Service Requests.
ADDITIONAL CASE INFORMATION

The following fields are optional:

- **Case Detail (additional)** - Case details used by ITS-Service Desk.
- **Assets** - List assets or equipment related to the case.
- **Type** - For additional categorization, associate requests or incidents with one of the following:
  - Problem
  - Feature Request
  - Question
  - General Information
  - Planned Maintenance

**Note**: “Planned Maintenance” should be used for standard changes to designate a start and end time for this work.
The half of knowledge is to know where to find knowledge

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
  - **Type** - ITS Support
  - **Detail** - myFSU Service Center