INFORMATION TECHNOLOGY SERVICES

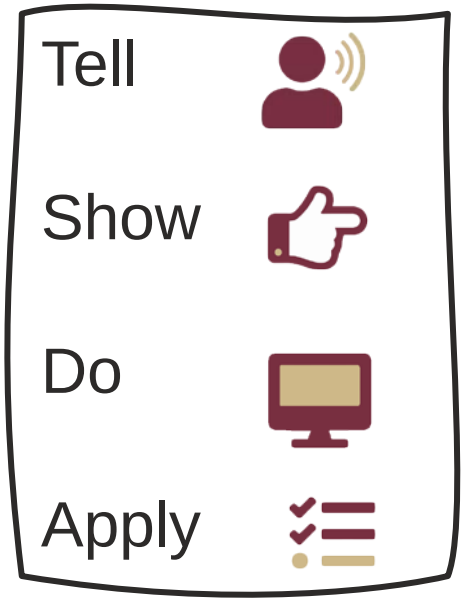
MYFSU SERVICE CENTER

Agent Training – September - October

WORKSHOP GOALS

- Ensure you feel informed, prepared, and supported in moving to the new myFSU Service Center on October 26.
- Learn case features from case intake to case closure
- Learn how to communicate with our customer/consumer and with other agents.

WORKSHOP APPROACH



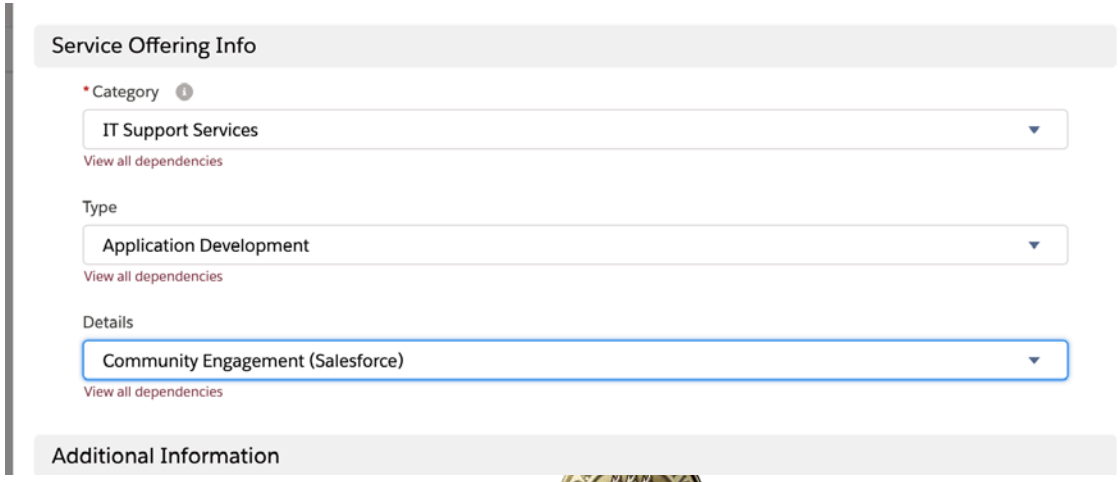
- Do
  - Hands-on and breakout groups
- Apply Your Learning
  - What questions do you have?
- Share
  - Deck is designed for your learning.
  - Final version of this deck will be posted on October 12 on the training page.

WORKSHOP DETAILS

- Who and what's in the sandbox?
  - **Data is "live" in sandbox**. Emails and posts sent to individuals while communicating on cases will be sent and received.
  - You will receive a daily digest email from Salesforce after today's session and on day's after actions have taken place that apply to you.
  - ITS Knowledge articles are in draft.
  - Sandbox will be available for a period after launch.
- Hands on and breakouts
  - **Use others in the session to create cases on behalf of an assign cases to.**

POST WORKSHOP

- After the session
  - For questions to CET, create a case in myFSU Service Center sandbox FSUdata01 and assign:
    - **Category** - ITS Support Services
    - **Type** - Application Development
    - **Detail** - Community Engagement (Salesforce)



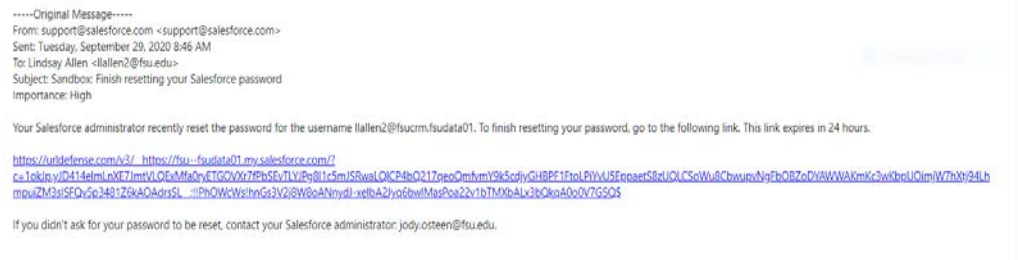
AGENDA

- Access to MyFSU Service Center
- Case Intake, Assignment and Routing
- Case Management Overview
- Creating, Owning and Working a Case
- Collaborating with Customer/Consumer
- Collaborating Internally on a Case
- Closing a Case
- Additional Information
- Next Steps

SERVICE CENTER ACCESS

LOGIN AND ACCESS

- First time sign for sandbox
  - https://fsu--fsudata01.my.salesforce.com
  - You received a verification code in your email
  - Click the link to create a password



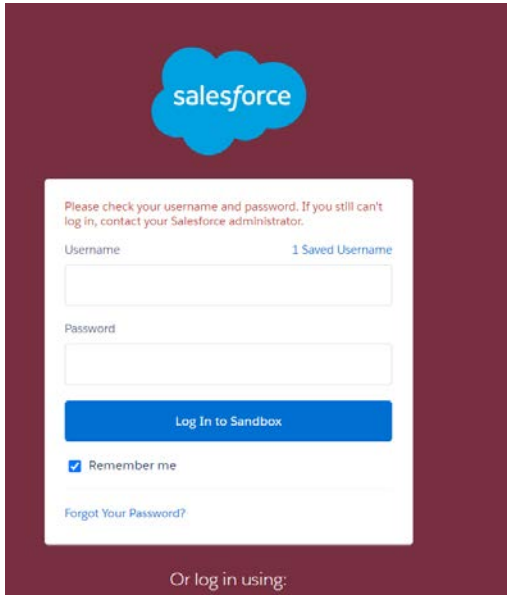
-----Original Message-----
From: support@salesforce.com <support@salesforce.com>
Sent: Tuesday, September 29, 2020 8:46 AM
To: Lindsay Allen <llallen2@fsu.edu>
Subject: Sandbox: Finish resetting your Salesforce password
Importance: High

Your Salesforce administrator recently reset the password for the username llallen2@fsucrm.fsudata01. To finish resetting your password, go to the following link. This link expires in 24 hours.

https://urldefense.com/v3/__https://fsu--fsudata01.my.salesforce.com/?c=1okJp.vJD414elmLnXE7JmtVLQExMfa0ryETGOVXr7fPbSEvTLYjPq8l1c5mJSRwaLOjCP4bO217qepOmfvmY9k5cdjyGHBPF1FtoLPiYvU5EnpaetS8zUOLCSoWu8CbwupxNqFbOBZoDVAWWAKmKc3wKbnUOimjW7hXtj94LhmpuiZM3sISFQv5p34812G6kAOAdrsSL__!!PhOWcWs!hnGs3V2j8W8oANnydJ-xelbA2Jyq6bwIMasPoa22v1bTMXbALx3bQkqA0o0V7GSQS

If you didn't ask for your password to be reset, contact your Salesforce administrator: jody.osteen@fsu.edu.

- Future sign in for the sandbox, go to:
- https://fsu--fsudata01.my.salesforce.com
- Forget your username, add your FSUID before @
- FSUID@fsucrm.fsudata01
- Forget your password, click on
  - **Forget Password to Reset.**



LOGIN AND ACCESS

- At go-live, access to myFSU Service Center will be available
  - myFSU Portal
  - myFSU Service Center page – servicecenter.fsu.edu

CASE INTAKE, ASSIGNMENTS AND ROUTING

CASE INTAKE OVERVIEW

Web to Case

- Service Center will have a new look and access to web to case form.
- Web form creates a pre-filled case in myFSU Service Center
- Custom web to case forms will be available in the future
- The **Case Owner** by default is determined based on the **Category, Type, and Detail** selections made by consumer.
  - If "Other" is selected from **Category,** it routes to the Service Desk in most cases.

Email to Case

- Some areas have a specialized email forms that creates a case from email

Phone to Case

- Agent creates a case or global action case

PROVIDER GROUP QUEUES

Each Provider Group has a **Queue** for cases that belong to a specific Provider Group.

A **Public Group** is created for each Queue and contains the Provider Group Members that belong to the queue. Queues can be viewed in the form of **List Views**.

You can use the **List View** to search to see cases that belong to a Provider Group.

Agents can work on any case except for Secured Cases without assigning it to themselves or another agent.

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, you as an agents can assign cases by updating the Case Owner.
- If a case does not have enough information for auto-routing, it will be assigned to the Service Desk.*

*This is similar to FSU's current process.

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 Provider Group as the Case Owner.

If deselected at time of submission, the agent entering the case is the Case Owner.

CASE MANAGEMENT

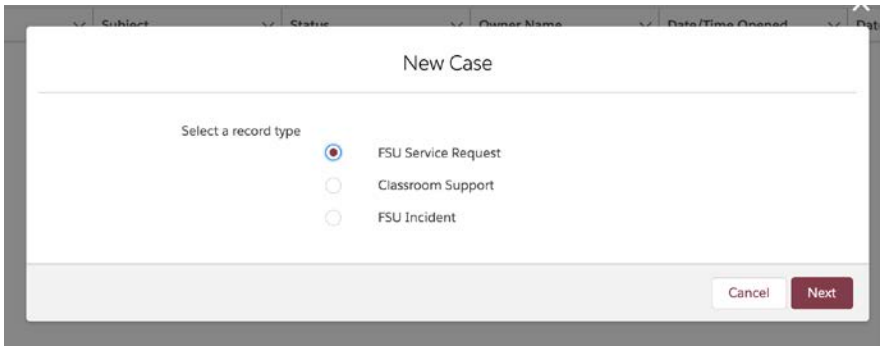
SYSTEM OVERVIEW

- Case Record Types
- Consumer Information
- Case Status
- Impact
- Consumer Reported Urgency
- Incident Priority
- Case Priority
- Service Offering Info
- Additional Information
- Case Closures

CASE RECORD TYPES

Expanded list of case types:

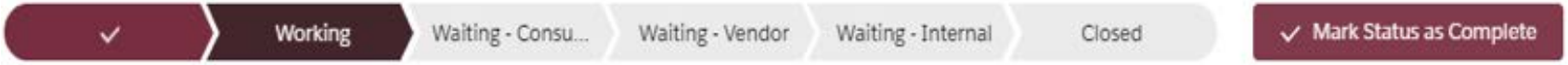
- Case Management
  - FSU Service Request
    - Need something
  - Classroom Support
  - FSU Incident
    - Something broken



CONSUMER INFORMATION

- Contact information for consumer originates from data warehouse (Student Central/HR)
  - If consumer does not have FSU contact information, you can add alt info such as name, email and phone.
  - You can search for individuals by their name, email, EMPID, FSUID, etc.
  - Can add a new contact for individuals who are not in the system such as a parent, vendor, etc.
    - This is similar to how an anonymous caller was created in PeopleSoft CRM
    - If as an agent you need to update your personal contact information this happens in PeopleSoft 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 recently been entered. No agent has been assigned to the case.
- **Working:** The case will **automatically be changed** to **Working** once assigned to an agent. (currently in progress)
- **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.

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 Incident Priority Model in additional information section at the end of this deck.

SERVICE OFFERING INFO

- **Category**, **Type** and **Details**
  - Only **Category** is required.

HOW TO CREATE CASES AS AN AGENT

OVERVIEW

New Case Creation

Global Actions aka Quick 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 search for and select the contact record of the consumer in the **Contact Name.** If no contact record, enter **Alt Name, Alt Email,** and **Alt Phone.**
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 Provider Group Queue.
9. Note: The **Case Owner** field is designed to represent the appropriate Queue for the case. The **Case Owner** field will change based on information provided.
10. 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.
11. Click **Save.** Use **Save** and **New** if entering multiple cases.

Notes: Case Priority is a calculated field. It can be viewed and/or updated at bottom of the **Case Information**

View how Case Ownership changes from you as individual creating case to the Case Owner Queue.

HANDS ON - BREAK OUT

- Create a New Case
  - Use example of Password Reset
  - Make the consumer someone in class
  - Fill out relevant case information without closing case.
  - Be sure to deselect Active Assignment at bottom of case form for training.

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 Provider Group **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.

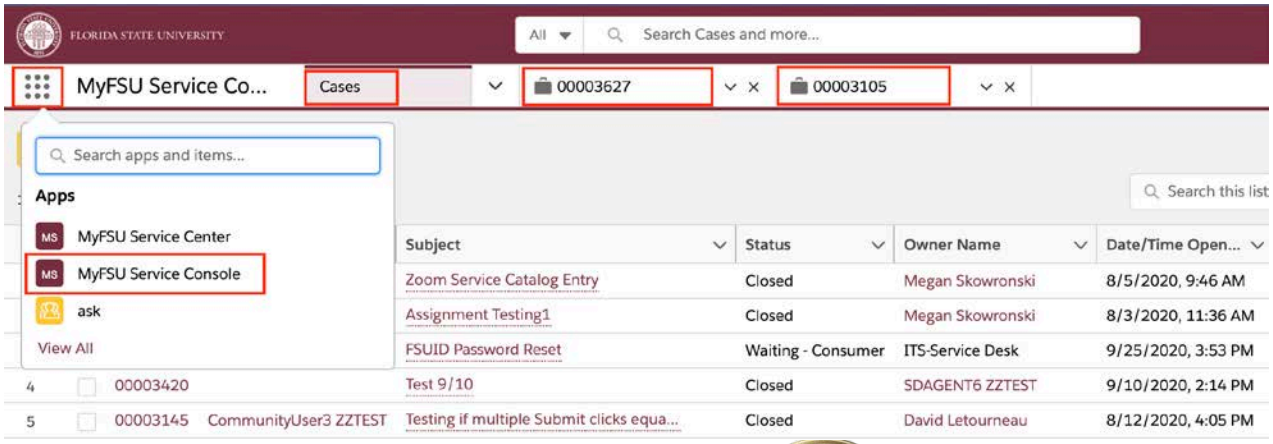
HANDS ON

- Create a case using Global Actions

MYFSU SERVICE CENTER CONSOLE

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

- **MyFSU Service Center 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.



HANDS ON

- Open the Service Console to see how you can work multiple cases at once.

APPLY YOUR LEARNING

- With your new knowledge of how cases and global actions are created and routed, what question do you have or you what ideas do you want to jot down to take back to your team?

Please enter your questions in Chat.

CASE OWNERSHIP

OVERVIEW

Case ownership can happen at the 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 or another agent in the Queue, or re-assign to another Queue.

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
- Provider Group from All Other List drop-down

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 Provider Group/Queue.
    - Click on **Case Number** and go to **Case Owner** field and click on person icon to **Change Owner**
4. Type agent name to assign case to
5. Click in checkmark to **send notification email** to notify new owner
6. Click **Change Owner**

Note: Use **Recently Viewed** list to change owner for multiple cases.

HANDS ON

- Change Case Owner to another member of the class.
- Case Owner will receive notification and email.

APPLY YOUR LEARNING

- What questions do you have for case routing for us or your team?

WORKING THE CASE WITH CONSUMER

OVERVIEW

myFSU Service Center offers many ways to communicate with the consumer, we recommend the following:

- System Generated Email
- Add Case Comments
- Share a Knowledge article
- Send an email
- Attach a file
- **As needed, change case status to "Waiting on Consumer" after communicating with a consumer using one of these methods if feedback is pending**.

CONSUMER EMAIL COMMUNICATIONS

System generated notifications to consumer

- Case Submission Email to Authenticated and Unauthenticated Users
- Self-Service New Comment
- Case Closed
- Case Resolved

COLLABORATE WITH CONSUMER

- myFSU Service Center includes a platform for collaborating with the consumer
- Consumers with FSUID can write comments on their cases for agents to view
- Agents can view consumer **Case Comments** and write comments back to them from the **case detail** record.

COLLABORATE WITH CONSUMER VIA CASE COMMENTS

- If Public checkbox is selected, the case comment is visible by Consumer in myFSU Service Center.
- Selecting **Send Customer Notification** will email the consumer.

1. When a consumer comments on a case the **Case Owner** receives a chatter notification.
2. To open the notification click **bell icon** in upper right of screen
3. Click the link in the notification to be directed to the case record
4. Click **Related** tab. Go to **Case Comments** to see consumer comment
5. To respond, click **New** button
6. Write comment in **Body**
7. Select **Public** via checkbox
8. **Send Customer Notification** checkbox auto populates to send notification
9. Click **Save**

HANDS ON

- Using your existing case, add a Case Comment to send to consumer.

USING KNOWLEDGE WITH CONSUMER

- As the case is created, if available, **Knowledge** articles identified as published public knowledge will be suggested based on the case details such as the subject and routing.

- ITS Knowledge is managed by the Change Leadership and Planning team, and all current FAQs have been transferred into myFSU Service Center.

USING KNOWLEDGE TO INFORM CONSUMER

- Consumers can solve their own cases using knowledge accessed on myFSU Service Center and log into myFSU Service Center to view attached articles on the case detail page

How to Search for Knowledge:

1. Open a Case record
2. Click **Knowledge** in **Case Details**
3. View pre-populated **Suggested Articles**
4. Click on article to review content
5. Navigate back using back button on browser
6. If you cannot find the article in **Suggested Articles**, search for other knowledge using **Search Knowledge** search bar

Note: Suggested Articles are based on details entered into the case such as Subject, Queue

ATTACHING OTHER KNOWLEDGE ARTICLES

- Follow these steps if the article you need is not listed among the suggested articles.

To attach an article not listed as a Suggested Article

1. Search for knowledge using **Search Knowledge** search.
2. Enter search criteria and click on Search icon – Magnifying glass or hit Enter.
3. Click on article to review content.
4. Navigate back using back button on browser
5. Attach the article by clicking the triangle to the right of the article and selecting the option **Attach Article**

VIEWING EXISTING KNOWLEDGE

- If another agent assigned knowledge articles to case, you can view what was sent to avoid redundancy

How to view previously attached articles on a case:

1. Open a Case record.
2. Under the **Parent Case** component on the left of the screen, **Articles** displays all articles attached to the Case.
3. **Alternatively,** go to **Related** tab and find the **Articles** section at the bottom of the page

HANDS ON

- Using your existing case, add a knowledge article, see options for **Password Reset**.

SEND AN EMAIL FROM A CASE

To ensure consumers receive a response on their case, you can email them directly from the case.

Email or a call is the only way to communicate with an unauthenticated consumer.

1. Go to **Chatter** tab
2. On **Email** tab, click within the “Write an email” field or select **Compose**
3. The **To** automatically adds the Contact associated with the case.
4. **Bcc is automatically updated with agent email address. You will likely want to uncheck the Bcc**
4. Compose the body of your message
5. Click **Send**

Note: To add additional recipients, manually enter an email address or search for contacts by selecting the **Look up email addresses** icon.

HANDS ON

- Using your existing case, send an email to consumer with a CC: to yourself.
- As long as you won't be tempted to read your email, review the notification that was sent BCC to you email.

CASE ATTACHMENTS

- Salesforce supports attachment of files to cases by the customer or the agent.
- Agents can send emails to the customer, directly from the case, and add attachments to that without storage concerns.
- Use a link to attach videos rather than storing it in Salesforce.
- **Data retention policy** will be put into place to reduce the storage requirements in Salesforce. Any data removed from the production Salesforce environment will be archived, not deleted.

ATTACH A FILE FROM WITHIN A CASE

You can add files such as an excel workbook, image or PDF directly to a case.

1. Open **Case** record
2. Click **Related** tab and go to **Files**
3. Files from your computer can be attached to a case by:
   1. Clicking **Upload Files** within Files to do a one-time upload
   2. Dragging files from computer to **Files** section
4. To add files owned by or shared with you in the myFSU Service Center click **Add Files**
5. Click **Done**

HANDS ON

- Using your existing case attach a file for your desktop.

APPLY YOUR LEARNING

How will your team use the various methods to communicate with the consumer?

Case Comments, Email, Knowledge Articles, Files

COLLABORATING INTERNALLY

OVERVIEW

myFSU Service Center offers many ways to communicate internally on a case.

- Start by viewing existing case information
- Review how to create and share case information internally
- **When communicating on a case, if you are waiting on another's action to continue working the case, you may need to update case status to Waiting – Internal.**

INTERNAL CASE COMMUNICATION

System generated notifications

- Case Assignment | Provider Group Queue (Case Owner)

Sharing case information Agent to Agent

- **Chatter Post** and tag individuals @

Sharing case information Agent to PGM

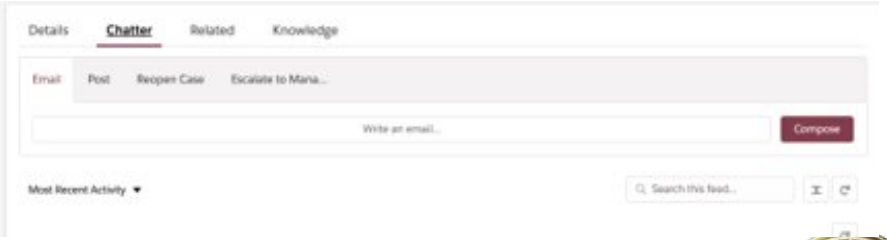
- Create **Chatter Post** and tag PGM
- **Tasks** and **Events**

CHATTER

All **Chatter Posts** live on the case record.

You can post updates and tag other internal users to alert them on case updates

1. Open a case record.
2. Click **Chatter** tab and then **Post** tab**.**
3. Write your post.
4. Tag an internal user by entering the @ symbol and append their name. As you start typing name, names will populate.
5. Select name of user to appear in **Post.**
6. Click **Share.**
7. The individual receives chatter notification. Notification appears in **bell icon** in the upper right of the screen. Note: The notification links directly to the **post.**



CREATE TASK FROM A CASE

- Can assign tasks for yourself or other team member to take action on a case. This will allow you to retain ownership of the case.
- Your **Upcoming Tasks** show up on **Home** tab
- Use of this option is determined by your **Provider Group Manager**

1. Navigate to case
2. Click **Related** tab
3. Go to **Open Activities**
4. Click **New Task**
5. Fill out **Task Information** and **Additional Information.** Required fields have an *.
6. Click **Save** or **Save & New** to add additional tasks.

CREATE EVENT FROM A CASE

- An event is scheduled for a specific day and time.
- Use this function to track meetings events, etc.
- Use of this option is determined by your **Provider Group Manager**

1. Navigate to case
2. Click **Related** tab
3. Go to **Open Activities**
4. Click on **New Event**
5. Enter needed information
6. Click **Save**

If assigned to yourself, the event will appear in the **My Upcoming Events** component on the **Home** screen

HANDS ON

- Add a Chatter Post to your case
- Add a Task or Event to your case

APPLY YOUR LEARNING

- What questions do you have for us or your team regarding internal collaboration?
  - Chatter Post and Tags
  - Tasks/Events

CASE CLOSING

CLOSE A CASE

Each case can be closed once work efforts are completed.

Important to completes steps in this order.

Closure reason is required the options are resolved, not resolved, no response or duplicate

Case close process is briefer than it is in PSCRM used currently

1. Select the Case
2. Under **Details** go to the **Closing Information** section
3. Click the pencil icon for **Case Resolution Comments** and enter any comments
4. Enter the **Close Reason** by clicking **View all dependencies** under the **Close Reason** field.
5. An **Edit Dependencies** screen will populate. Select **Closed** for Status.
6. Enter the **Close Reason.**
7. Click **Apply**.
8. Click **Save**

Note: If your screen refreshes during these steps, be sure to scroll to the bottom of the screen and click **Save**.

HANDS ON

- Close your Case

APPLY YOUR LEARNING

Understand how to manage a case from intake to closure. What questions do you have?

WHAT'S NEXT

Encourage you to create cases in the sandbox. Try cases you are entering today in your current system.

Visit our project website frequently for the following updates:

- Training documents and recordings
- Register for upcoming Pre and Post Go Live Clinics from October 19 through October 30

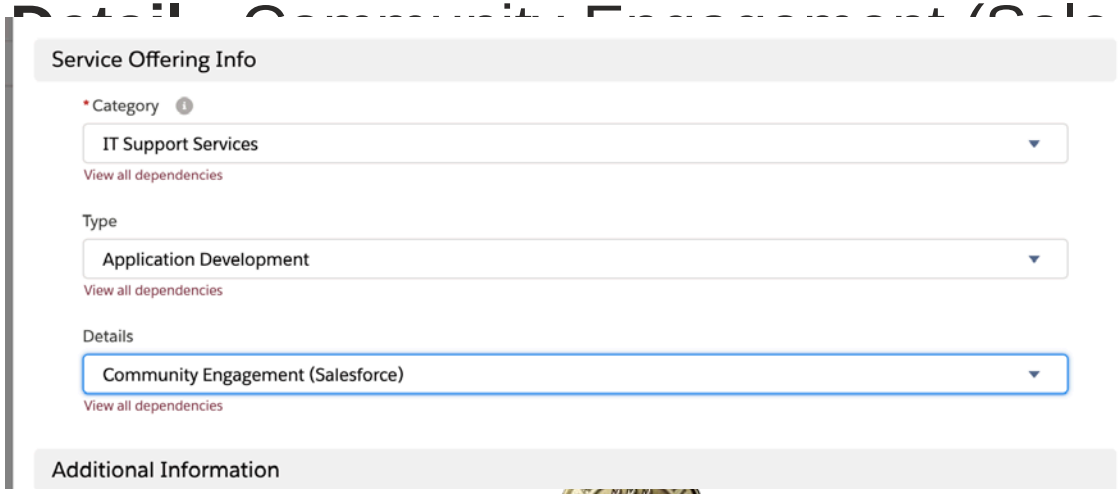
Additional resources in the myFSU Service Center

- How to Knowledge articles for new features
- Cross-Walk for CTDs and ITS Service Catalog from current to future state
- Case Routing Information.

Please complete our post session survey. You will also receive the link in a follow-up email.

REMEMBER TO LOG QUESTIONS

- After the session
  - For questions to CET, prior to production, create a case in myFSU Service Center sandbox FSUdata01 and assign:
    - **Category** - ITS Support Services
    - **Type** - Application Development
    - **Details** - Community Engagement (Salesforce)



INFORMATION TECHNOLOGY SERVICES

THANK YOU

ADDITIONAL INFORMATION

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 queue.

Note: Cases closed more than 30 days prior cannot be reopened by agents or consumers.

1. Navigate to a closed case and go to the status bar at the top
2. Change the status of the case from closed by either:
3. Clicking the **Change Closed Status** button, selecting a different status (do not select **New**) in the **Edit Dependencies** window, and clicking **Done** or
4. Selecting a status option in the status bar (do not select **New**) and clicking the **Mark as Current Status** button
5. The case will be flagged as a **Reopened Case**. This flag persists regardless of additional status changes.

Note: Agents can continue to comment on the case after it closed.

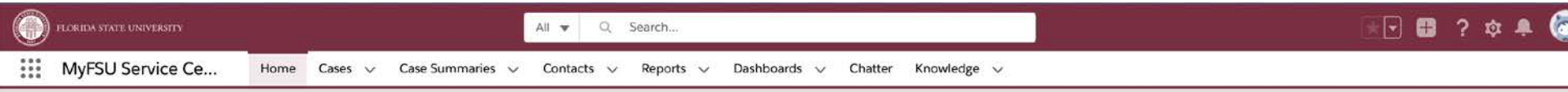
HOW TO SEARCH FOR A CASE

Search for a case by entering a value in the Global Search box at top of page
Note: You can search for case by number without adding leading 0000

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

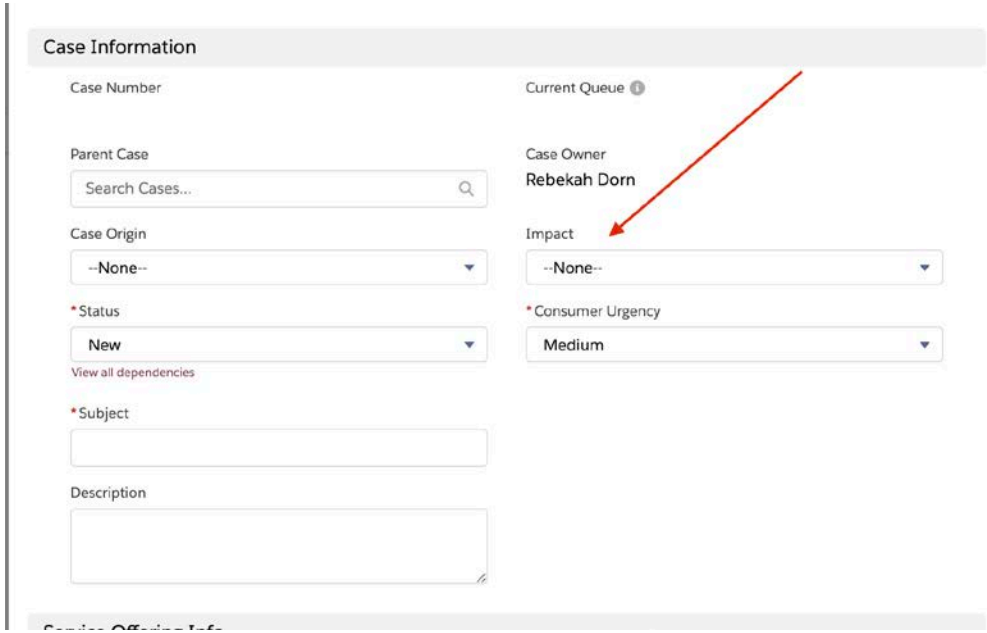
- Case Comment (N/A in Salesforce App)
- Case Number
- Description
- Subject
- Email (if entered on web form)
- Name (if entered on web form)
- Phone (if entered on web form)

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



IMPACT

- Impact allows the agent to select the severity of the consumer problem.
  - None
  - Critical
  - Major
  - Minor
  - Small



CONSUMER REPORTED URGENCY

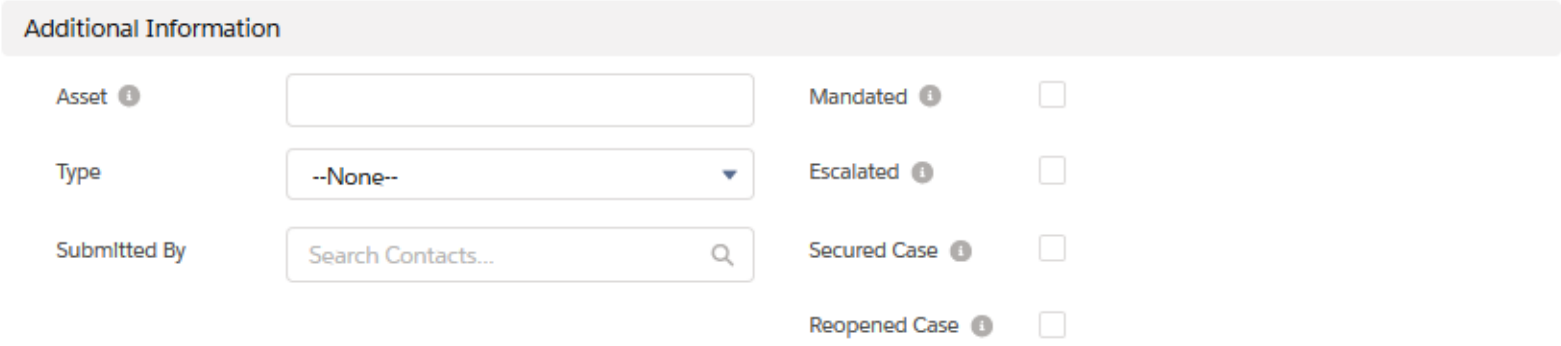
Priority	Description	Response Time
Low	Impacts a specific customer's ability to work for a short time. These cases are generally less time-sensitive or do not require immediate resolution.	8 bus hrs
Medium	Represents problems that impact one or more customers. Does not significantly impact productivity because alternative resources or workarounds are available.	4 bus 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 bus 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

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

ADDITIONAL CASE INFORMATION

The following details are optional:
Assets - List of assets or equipment related to the case
Type - If you have a standard change, you can use the **Planned Maintenance** to designate a start and end time for this work.
.



FOLLOW A CASE

Managers can f**ollow** cases an agent is working on and receive update in the Chatter feed on the case.

Agents can **follow** cases assigned to another provider group.

1. Open a case
2. In the section above the case status bar, click **+ Follow**
3. The button text changes to **Following,** It will display **Unfollow** if you hover over it.
4. To **Unfollow**, simply click the button to change.
5. After following a case, you will receive notifications in Service Center when the case is updated.

Note: Updates can also be viewed from the **Chatter Feed** at bottom left of screen or on your **Home** page and the **Chatter** section in your navigation bar.

ESCALATE A CASE

An agent in a provider group may be assigned a case that needs to be escalated to work and/or solve. This will change the owner and owner will receive an in-system notification.

1. Open the Case to escalate
2. Click the **Chatter** tab
3. Click **Escalate to manager**
4. In the **Case Owner** field, search for and select the appropriate manager
5. In **Escalation Note**, write applicable details
6. Click **Save**

Note that an **Escalation Details** tab appears on the left side of the screen on the case detail record

On the case details tab, under **Additional Information** note that the **Escalated** checkbox is checked