CREATING A PERSONALIZED LIST VIEW QUICK GUIDE

CREATING PERSONALIZED LIST VIEWS

Description: This quick guide provides the steps for creating personalized list views. Information included:

Related resources on MyFSU Service Center page

- Creating Personalized List View recording

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LIST VIEWS FOR CASES AND QUEUES

List views are the fastest way to get a snapshot of cases by individual, by queue, etc.

- My Cases
- Your Provider Group from **All Other Lists**
- Create a Personalized List View
- Recently Viewed (default)
- All Cases or All Open Cases

Personalizing a list view allows you to add:

- Team members/Case Owners (not using **Use Active Assignments Rules**)
- Team members/Case Owners not in the same queue
- Other queues you manage

PERSONALIZING LIST VIEWS

- Managers and individuals in multiple queues can benefit from quick insight into Case Status with a personalized list view.
- myFSU Service Center - Glossary of Fields for Lists and Reports. This guide will be published in the myFSU Service Center with training documents and Knowledge articles

Follows these steps

- Create a clone from and existing list view
- Add Team Members/Case Owners or Queues

STEP 1: HOW TO CLONE A LIST VIEW

1. Click on **Cases** drop-down
2. Select **All Cases** to open the list view
3. Click on **All Cases**
4. Enter name of your queue in search field (example: ITS-Service Desk)
5. Click on the queue name
6. Click the **settings icon (gear)**
7. Click **Clone** from dropdown list
8. Enter a name for the list.
9. Select **Only I can see this list***
10. Click **Save.** Your individual list has been created. Click **Save**

* Note: PGMS and agents are unable to share their list view. Instead, individuals can make their own personalized copies of available lists.

STEP 2: ADDING CASE OWNERS & QUEUES

1. Click **Add Filter** to update the list using the combination of **Field, Operator** and **Value**
2. Click the dropdown at the right of **Field**
3. Select **Owner Name** to add either the following filter(s) to the existing list filter
4. Enter the names of your team members or your queue(s) separated by commas in the field below **equals**
5. Click **Done**
6. Click **Save** at top right

Notes: Based on default list rules, the list displays only Open cases as the filter is set to **Closed equals False**

For information on available cases and filter fields, **see myFSU Service Center – Glossary of Fields for Lists and Reports**.

CREATE YOUR DEFAULT PIN LIST VIEW

- The default pin list is the **Recently Viewed** list.
- If a new list is pinned it will load as your default view.

1. Click on **Cases**
2. Click on drop down next to the name of displayed list view.
3. Search for and click on name of the list from the search field.
4. Click the **Pin** icon.

Note: While you can only have one pinned list, your Cases drop down displays all your **Recent lists** for easy access.

KNOWLEDGE RESOURCES

- For more detailed information, see the Knowledge articles linked below. For more articles, go to Knowledge and select the “Agent Training Articles” list. You can also search for the #AgentTraining topic and go to the Related section of that topic page.
- Knowledge articles in the myFSU Service Center may be archived or removed over time. If you are unable to locate an article by the link included in this training document, please be sure to search for the article by name instead

How to Create a Personalized List View

How do I view a specific list view for my queue

How to View Individuals in Your Queue