INFORMATION TECHNOLOGY SERVICES

MYFSU SERVICE CENTER

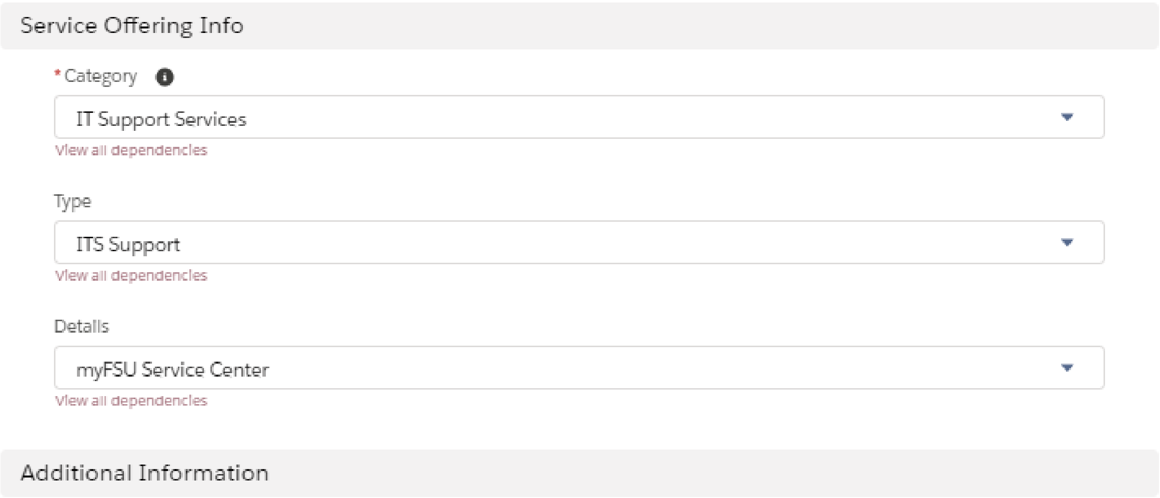
Collaborating Internally

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.

COLLOBORATING INTERNALLY

INTERNAL CASE COMMUNICATION

System generated notifications:

- Case Assignment | Queue (Case Owner).
- Case Assignment | Agent (Case Owner).

Sharing case information Agent to Agent:

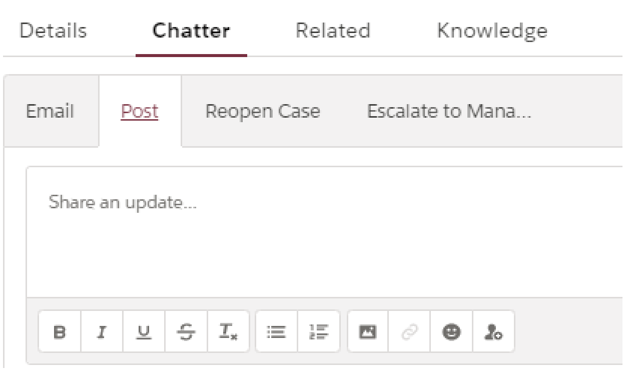
- **Chatter Post** and tag (@) individuals.
- **Tasks** and **Events.**

Notes:

- There is a myFSU Service Center notifications guide available for agents under **Quick Links** on their Home page.
- When communicating on a case, if you are waiting on another agent's or queue's action, you should update the case status to **Waiting – Internal**.

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 bell notification links directly to the post.

CREATE TASK FROM A CASE

- You can assign tasks for yourself or other agents to take action on a case. This will allow you to retain ownership of the case.
- Your **Upcoming Tasks** show up on **Home** tab.

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.

Note: Tasks can be assigned to a person, queue, or group.

- Assigning a task to a group will create multiple entries of the same task assigned to each member of the group.
- Assigning to a person or queue will create one task entry.

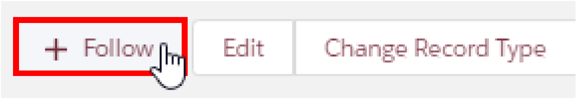
CREATE EVENT FROM A CASE

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.**

- An event is scheduled for a specific day and time.
- Use this function to track meetings events, etc.
- If assigned to yourself, the event will appear in the **My Upcoming Events** component on the **Home** screen.

FOLLOW A CASE

Agents can **follow** cases being worked by another queue or agent to receive updates in their Chatter feed.



1. Open a case.
2. In the section above the case status bar, click **+ Follow.**
3. The button text changes to Following, and it will display **Unfollow** if you hover over it.
4. To **Unfollow**, simply click the button to change.
5. After following a case, updates can 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

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.**

- An agent in a queue may be assigned a case that needs to be escalated to work and/or solve.
- Escalating a case will change the Case Owner and that owner will receive an in-system notification.

Note: After escalating a case, an **Escalation Details** section will appear on the left side of the screen on the case record. On the case **Details** tab, under **Additional Information**, the **Escalated** box will be checked.

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
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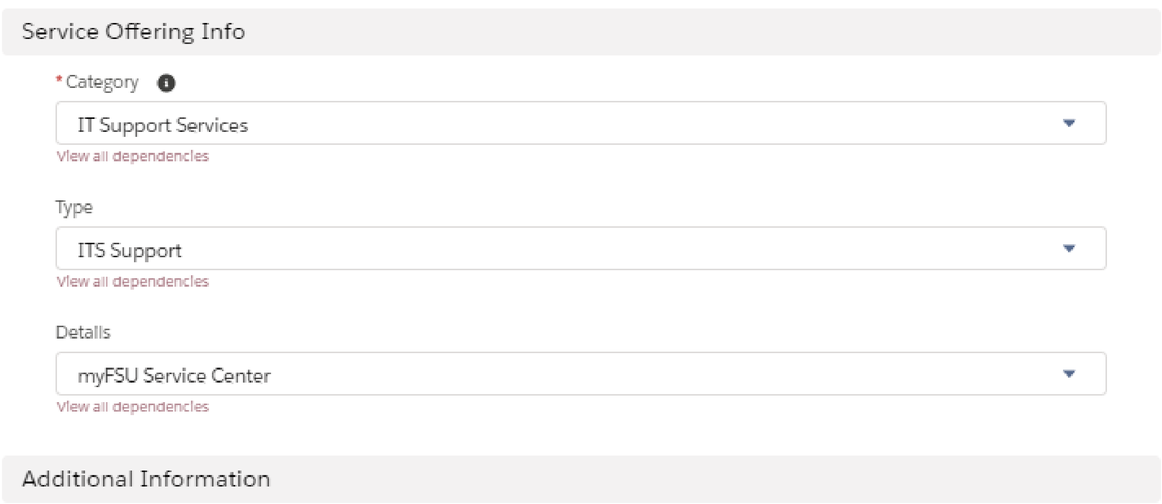


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THE FLORIDA STATE UNIVERSITY