INFORMATION TECHNOLOGY SERVICES

MYFSU SERVICE CENTER

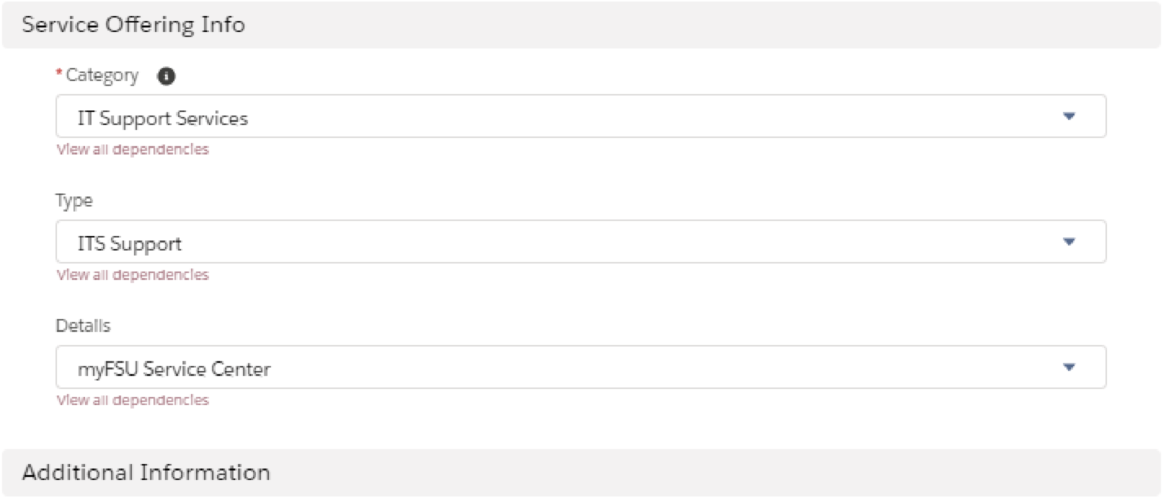
Additional Case Information

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

- 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.

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.

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.'*

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

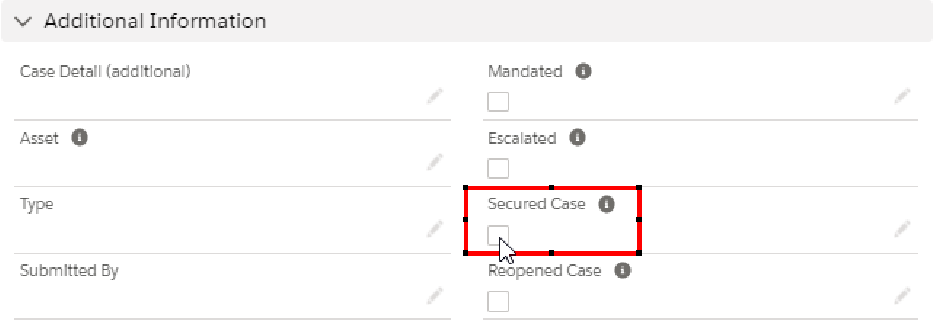
SECURE CASE

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

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

Note: The functionality for Mandated Cases only exists for **Service Requests**

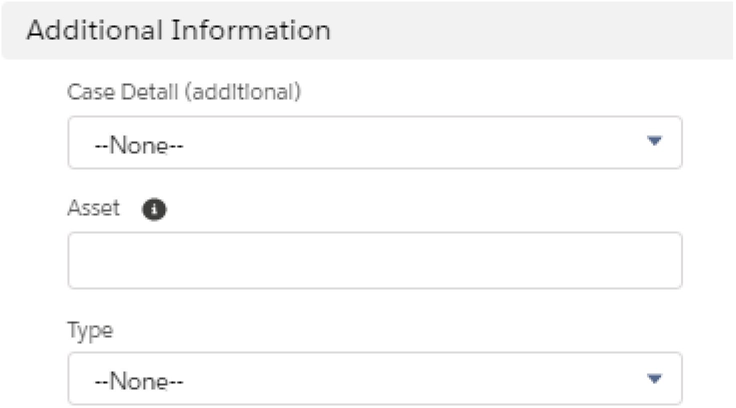
ADDITIONAL INFORMATION

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.



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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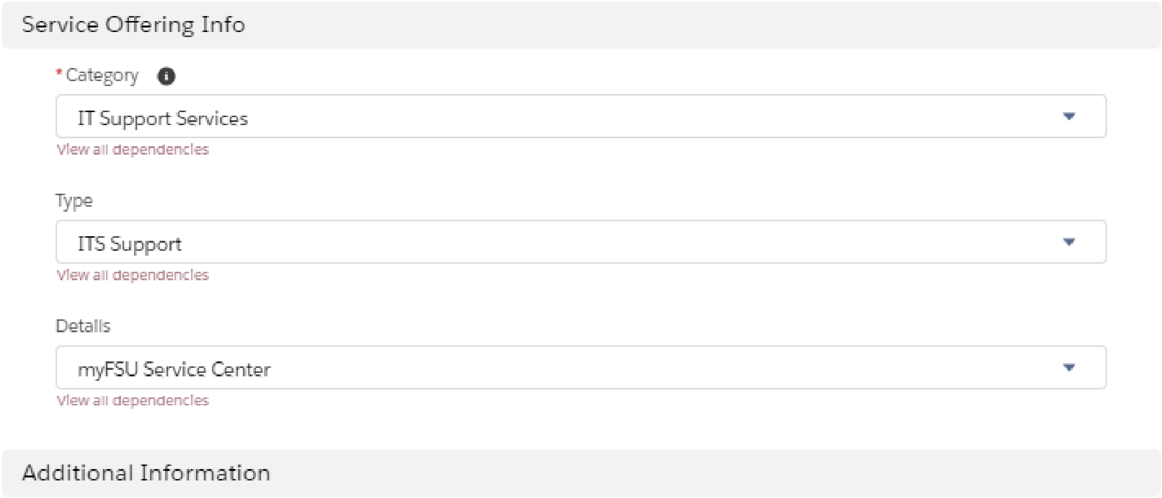

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THANK YOU