THE FLORIDA STATE UNIVERSITY
INFORMATION TECHNOLOGY SERVICES

Customer Service Training Activities

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FSU Service Center

Quick Reference Guide v.5

Revised 11/21/11

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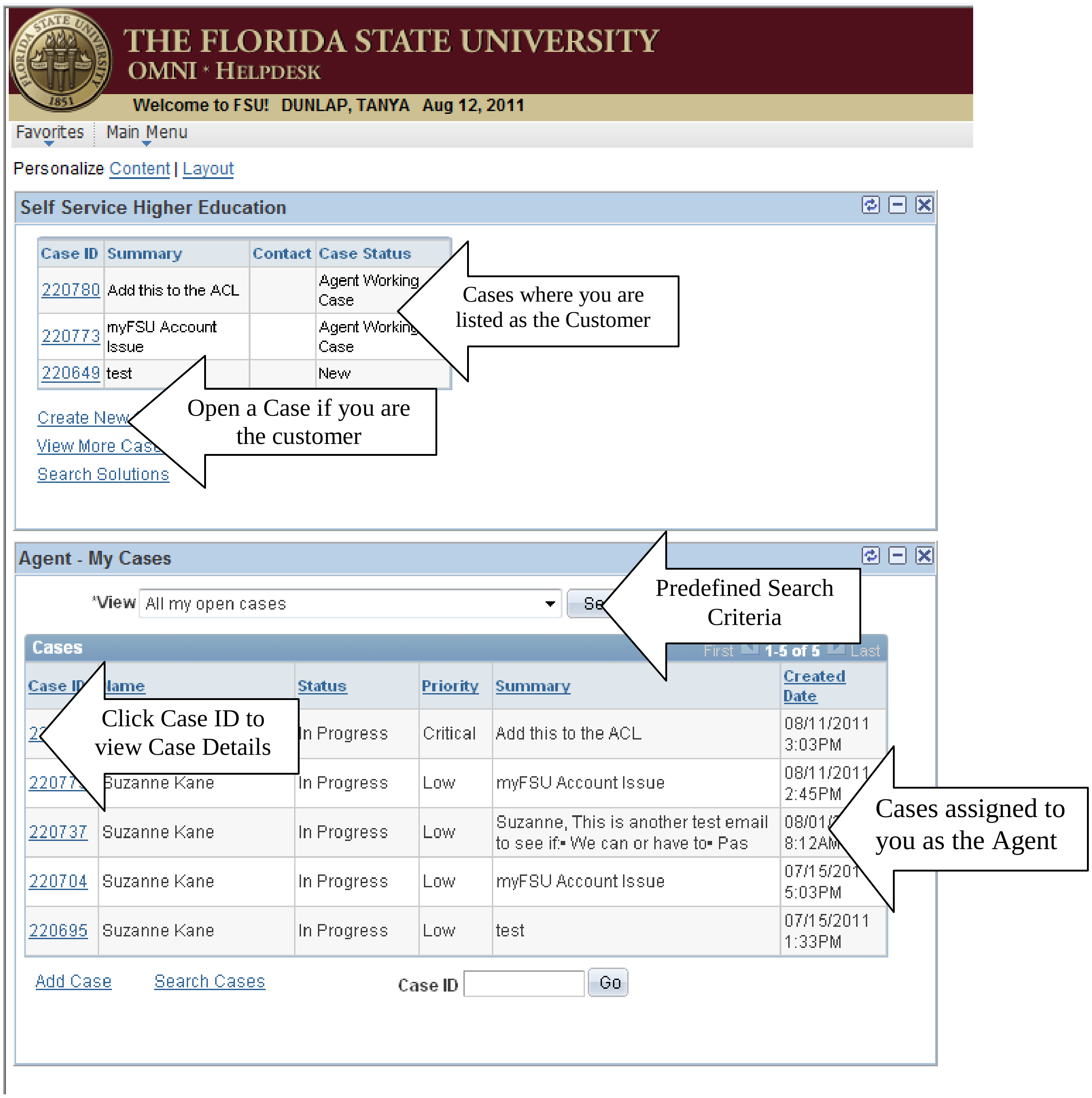
Quick Reference Tips for the FSU Service Center

1. FSU Service Center: http://servicecenter.fsu.edu
2. Try to stay updated with the most current version of the FSU Service Center Quick Reference Guide (check the version numbers on the cover) as new features become available
3. If you are working on a case, remember to assign the case to yourself.
4. Check the box "Anonymous Caller", if the customer is not in the system. After you add a case (refer to the section "Add a Case via Analyst Service Center").
    - Add the person's email address to "Contact Method":
        - To the right of "Contact Method", click "Edit".
    - Under "Contact Type" choose "Email".
    - Enter the person's email address in "Contact Details".
    - Select the Email contact method.
    - Click "OK".
5. Save Often (or Alt+1): We recommend you save after every action.
6. When adding a note or solution make sure it is designated as "external", if you want the customer to see it, "internal", if you only want agents to see it.
7. When adding a note or solution, the customers will not receive an email notice automatically. You must manually send the email and choose the recipients. See the section **Emailing Outbound Notice from a Case - Agent**
8. Make sure that the email address on the case is not the problem with the case. If it is, add another email to use to contact the customer.
9. Use the category- type-detail to auto-route rather than assigning a case to a provider group, unless you need to directly assign it to them
10. Use the correct email template when sending an outbound notification.
    - When solving a case and sending out the e-mail, the "templates" are worded to talk about a case that's completely resolved.
    - There's a different template to select for attempted solutions, and when you select it and change it, it adds the new template on top of the old one so you will need to cut out the old verbiage.
    - Also, the subject doesn't change when changing the template either. This is only for solutions.
11. Use the case status update dropdown when working on cases.

Higher Education View – FSU Service Center

Overview:
Understanding and detailing some of the features of the Higher Education View

Scenario:
How to use the available shortcuts and feature without navigating through the main menu



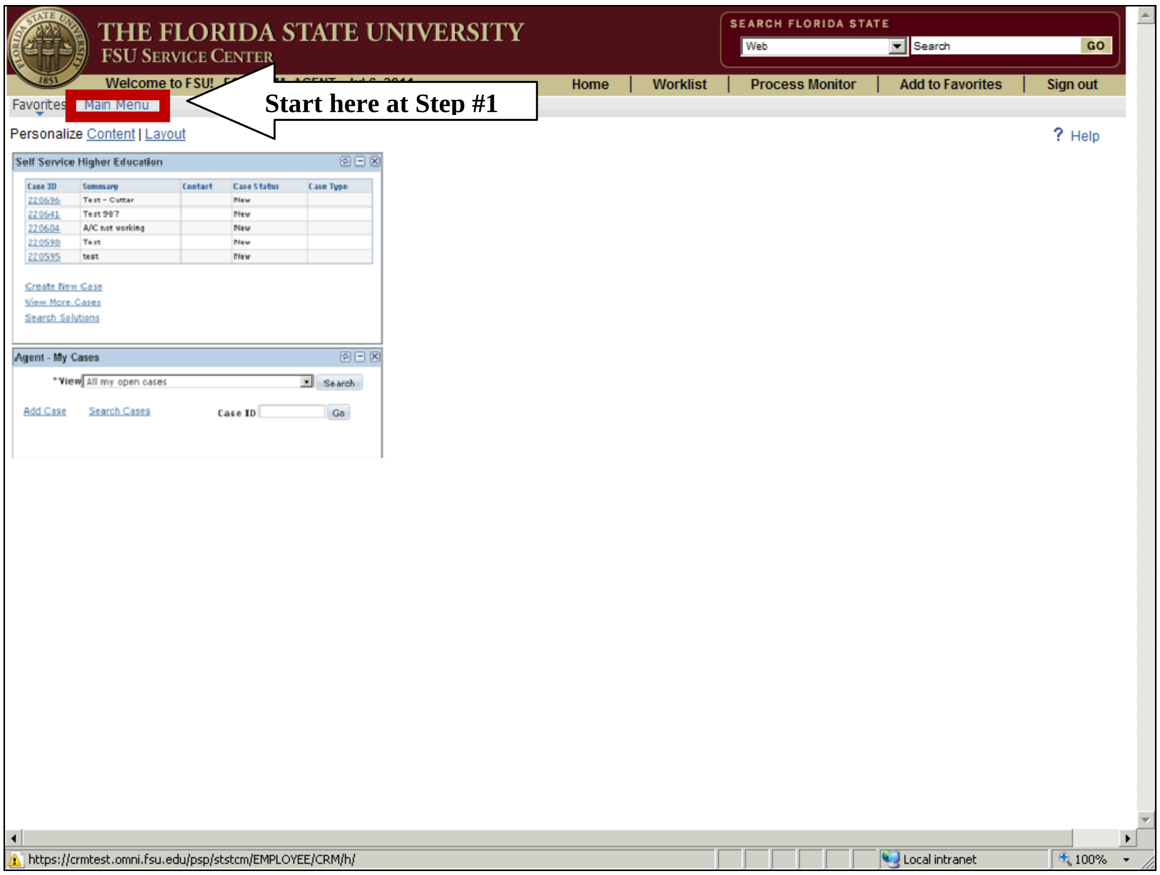
NOTE: HOME on the top right of the page will return you to this page from anywhere in the FSU Service Center.

Add New Case via Analyst Service Center - Agent

Overview:
Understanding how to add a new case for a customer

Scenario:
In this topic, you will learn how to open a new case for a customer. This topic will cover Quick Codes, selecting Anonymous Caller, Secure case and Resolve on

Key Information:
Opening a new case in Constituent 360-Degree View



Step	Action
1.	Click the **Main Menu**. Main Menu
2.	Click the **Analyst Service Center** menu. Analyst Service Center
3.	Click the **Add Case** menu. Add Case
a)	**NOTE:** Checking **Anonymous Caller** under **Case Information** will change the customer to an Anonymous Constituent. This feature is used to open cases that have no associated customer. If this does not apply, continue to step 4
4.	Enter the appropriate **Customer Information** by filling in the first name, last name or Employee ID in the fields next to **First Name, Last Name** and **Emplid.**
5.	Click the **Search** button and choose the appropriate customer from **Search Results**. Search **NOTE**: If the customer has a unique name, it will auto fill the customer name and employee id.
a)	**Quick Codes** will pre-populate the **Category**, **Specialty Type**, **Details**, ***Problem Summary** and **Description.** Any one of these fields can be edited or changed. **Quick Codes** will not overwrite any information populated in the above mentioned fields.
b)	Checking **Secure Case** will make the information in the case private. Once this box is checked, only the assigned agent and/or assigned Provider Group assigned are authorized see the details of this case.
c)	**Resolved by First Contact** check box automatically closes the case when saved.
6.	Click **Category** dropdown and select the appropriate value.
7.	Select the appropriate **Specialty Type** from the dropdown list. **NOTE:** Some options in the field **Category** may not have an available **Specialty Type** or **Detail** listed.
8.	Select the appropriate option from the **Detail** list **NOTE:** Some options in the field **Specialty Type** may not show any listings in the **Detail** field.
9.	Select the appropriate **Source** from the list.
10.	Enter the appropriate information into the ***Problem Summary** field summarizing the problem.
11.	Enter the appropriate information into the **Description** field explaining the problem or concern reported.
12.	Click the **Save** button. Save
13.	**Congratulations!** You have completed this topic. End of Procedure.

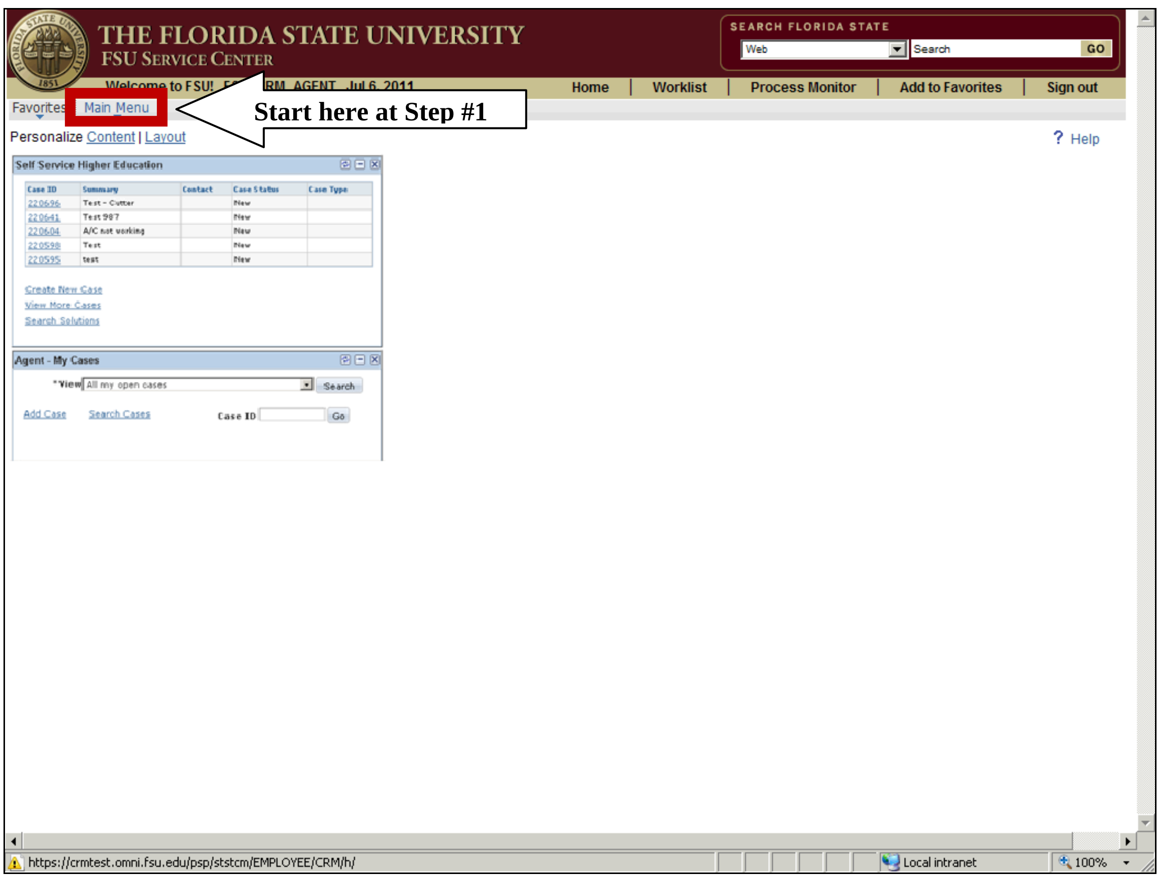
Viewing My Worklist for a Provider Group - Agent

Overview:
Understanding how to view the cases assigned to a Provider Group and Agent

The Provider groups are organized groups of workers that provide the services or support that are offered by an organization. Cases and service orders are assigned first to a provider group and then to a member of a provider group.

Scenario:
In this topic, you will learn the steps to view the cases assigned to a Provider Group through the use of **My Worklist.**

Key Information:
Assigning a Case to an Agent



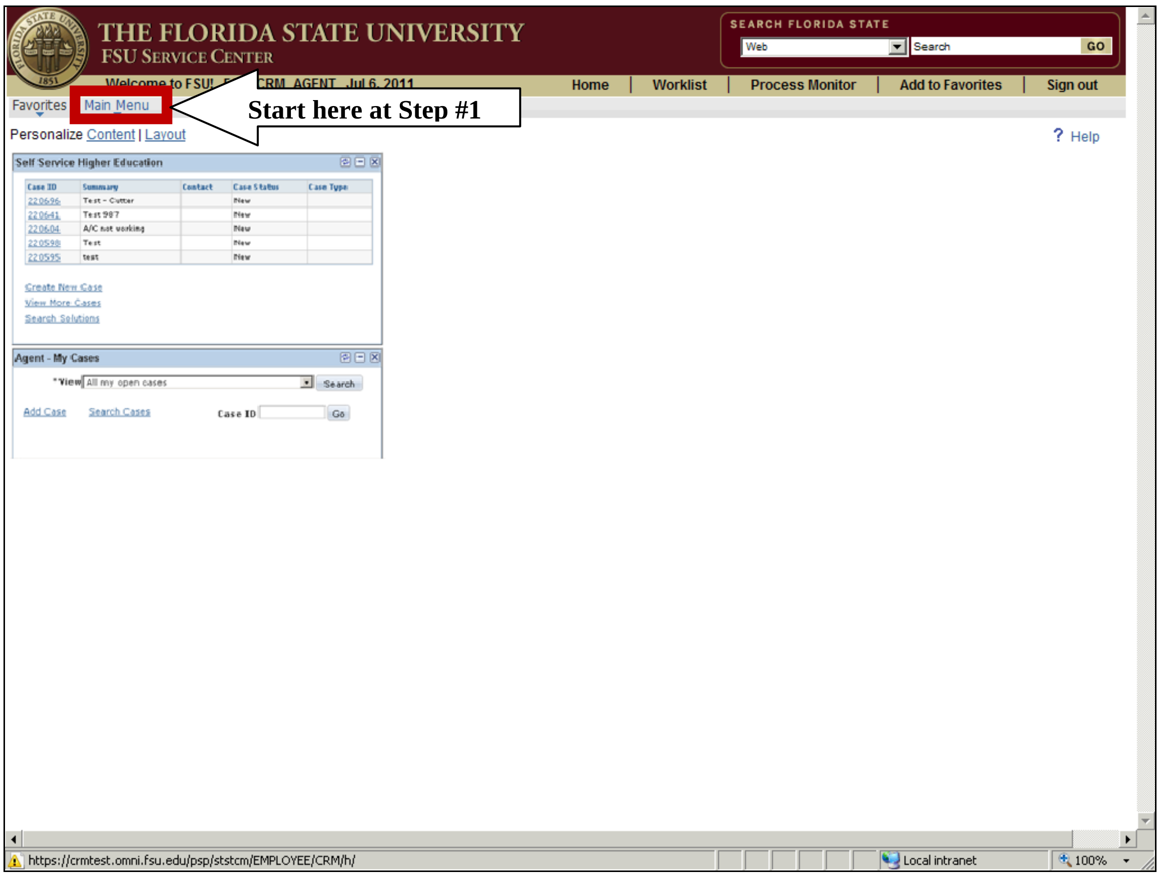
Step	Action
1.	Click the **Main Menu** menu. Main Menu
2.	Click the **My Worklist** menu to view. My Worklist
3.	You will see the **Inbox** which represents all of the cases assigned to the agent. To view the cases assigned to the provider group but not assigned yet to an agent, click the **Group Worklists** link. Group Worklists
4.	Click the appropriate Provider Group name from **Group Worklist** dropdown list. From the search results, you can choose all of the cases assigned to your Provider Group. **NOTE:** You can be a member of one or more than one Provider Group. The list will only show those Provider Groups that you are a member of.
5.	**Congratulations!** You have completed this topic. End of Procedure.

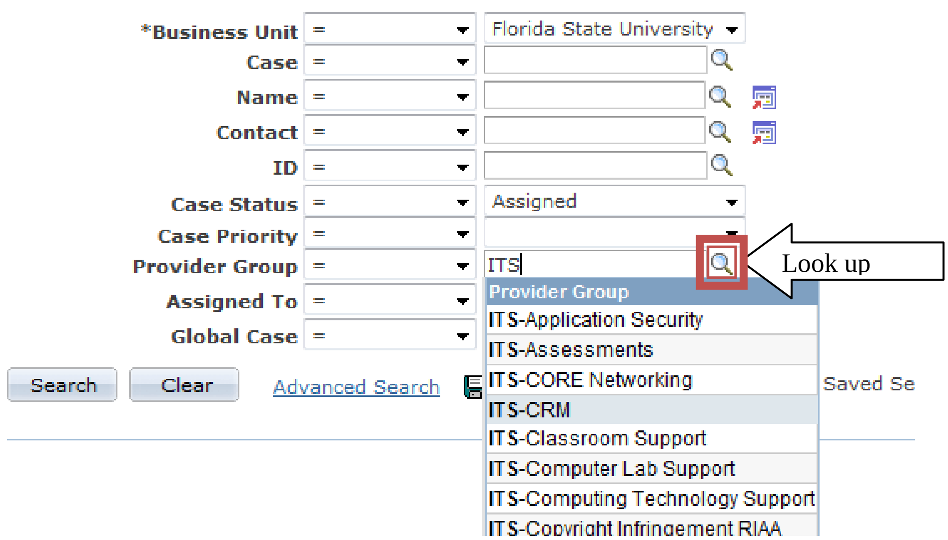
Searching for Cases - Agent

Overview:
Understanding how to use the Case Search feature as an agent

As an Agent, you may need to use the Case search features

Scenario:
In this topic, you will learn the steps to Search for cases using different search criteria such as but not limited to Provider group, assigned agent or case status**.**



Step	Action
6.	Click the **Main Menu** Main Menu
7.	Click the **Analyst Service Center** menu item. Analyst Service Center
8.	Click **Search Cases** menu item Search Cases
9.	Under **Search**, enter the appropriate search criteria in the fields. **NOTE:** You can use one or multiple criteria options to search. For example, search by Assigned cases within the Provider group ITS CRM, from the dropdown list next to Case Status, select Assigned, Then next Provider Group select use the Look up icon to see the list of provider group or type in ITS-CRM 
10.	Click the **Search** Button NOTE: Search criteria can be saved by clicking on the link Save Search Criteria Save Search Criteria
11.	Select the appropriate case from the **Search Results** by clicking the number under the **Case** column.
12.	**Congratulations!** You have completed this topic. End of Procedure.

Assigning Case to an Agent - Agent

Overview:

Understanding how to assign an open case found in the Provider Group Worklist to an agent

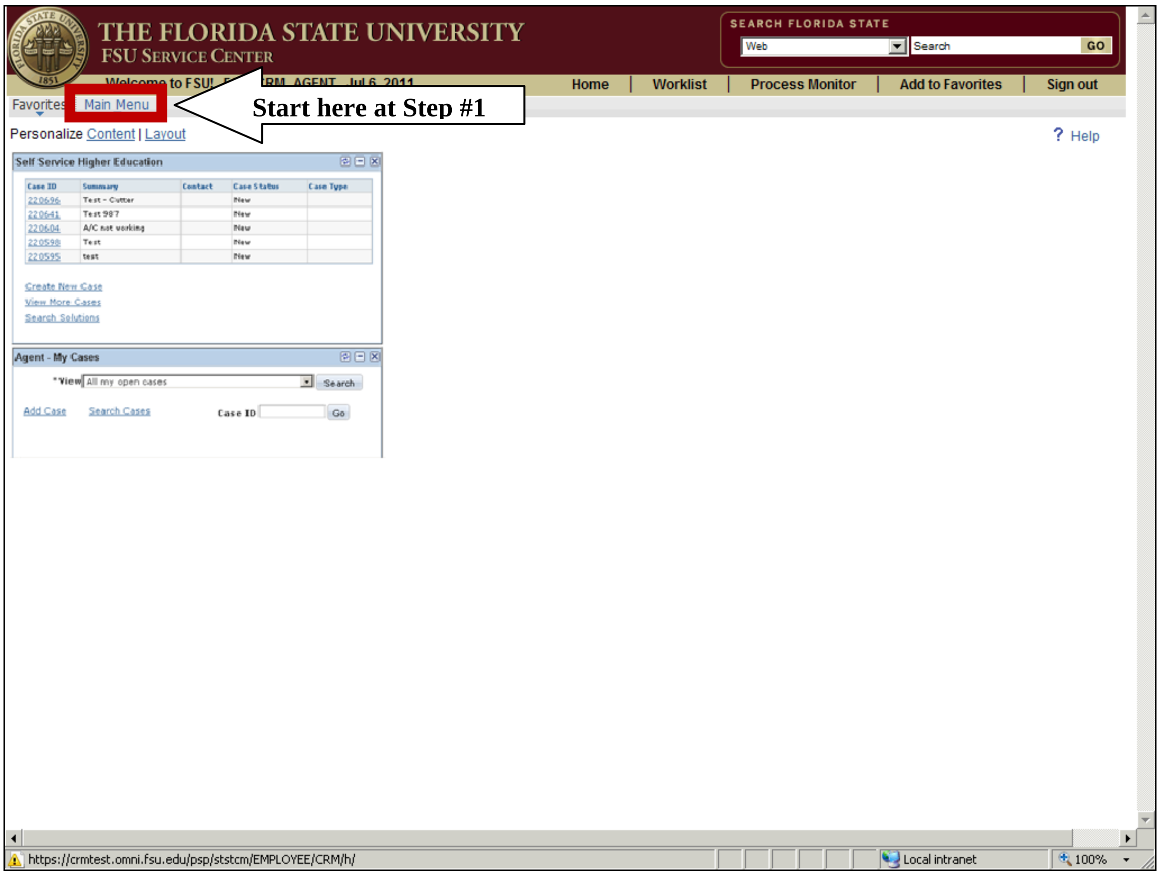
As a Provider Group Manger, you will be given the responsibility of assigning cases to agents within your provider group. An agent may also assign a case to themselves. In this topic, we will show you the steps to look up a case within a Provider Group and assign that case to an agent

Scenario:

In this topic you will learn the steps to assign a case listed in your Provider Group Worklist to an agent.

Key Information:

Viewing a Worklist for a Provider Group



Step	Action
1.	Click the **Main Menu** menu. Main Menu
2.	Click the **My Worklist** menu. My Worklist
3.	You will see the **Inbox** which represents all of the cases assigned to the agent. To view the cases assigned to the provider group but not assigned yet to an agent, click the **Group Worklists** link. Group Worklists
4.	Click the **Group Worklist** drop down.
5.	Select the appropriate provider group from the **Group Worklist** dropdown list. **NOTE:** An Agent may be a member of more than one Provider Group. If the agent is not a member of that Provider Group, that Provider Group name will not show in the list of the **Group Worklist**.
6.	Select the appropriate case from the Search Results under **Worklist Item.**
7.	To view a list of Agents in this Provider Group, Click the **Look up Assigned To (Alt+5)** graphic.
8.	Select the appropriate **Agent** within the **Provider Group** list.
9.	Click the **Save** button. Save
10.	**Congratulations!** You have completed the topic. **End of Procedure.**

Adding a Note to a Case - Agent

Overview:
Understanding how to add a note to an open case

Scenario:
In this topic, you will learn the steps to add a note to an open case.

Notes can be used to communicate messages or provide updates to the customer, an agent or any interested parties who may need to know more information. The Notes feature can also be used to add attachments (ex. Screen shots, forms, excel workbooks, etc)

Key Information:
Viewing **My Worklist** for a Provider Group

Step	Action
1.	Click the **Main Menu** menu. Main Menu
2.	Click the **My Worklist** menu. My Worklist
3.	Click the appropriate case number from the **Worklist items** column to view the case.
4.	Click the **Notes ()** tab. Notes (0) *If a note is pre-existing, click the **Add Note** button
5.	Enter the appropriate information into the ***Subject** field.
6.	Enter the appropriate message in the field **Details**.
7.	Click the ***Visibility** list. **NOTE:** If ***Visibility** is set to **Internal** that means the note can only be viewed by agents**.** If ***Visibility** is changed to **All**, notes can be seen by customers and agents. All
8.	**Optional:** Click the **Note Type** list to mark this note as a **Comment**. Comment
9.	Click the **Apply Note** button. Apply Note
10.	Click the **Save** button. Save **NOTE:** Case notes do NOT send an E-mail notification to the customer or to the Agent/Provider Group. Continue to the next step for those instructions.
11.	Click the check box next to the appropriate note you would like to email. Select
12.	Click the button **Email** Email
13.	Under the list **Recipients**, check the appropriate name under **To, CC** or **BCC**. Recipients **NOTE: Email** column to each recipient is checked by default. **OPTIONAL:** Click the link Add Recipient if another person who is not listed, should receive a copy of this note/solution. Continue on to Step a)
a)	Click **Add Recipients** link
b)	Enter the appropriate name under **Search for Recipients**
c)	Select the appropriate name from the **Search Results** by adding a check under **Select**
d)	Click the **Add Recipient List** button, Repeat steps a) thru d) if necessary

Step	Action
e)	Click Apply to return to **Outbound Notification**
14.	Select the appropriate message template next to the **Template** dropdown list.
15.	Click the **Send** link. 
16.	Click the **Save** button. 
17.	Congratulations! You have completed this topic. **End of Procedure.**

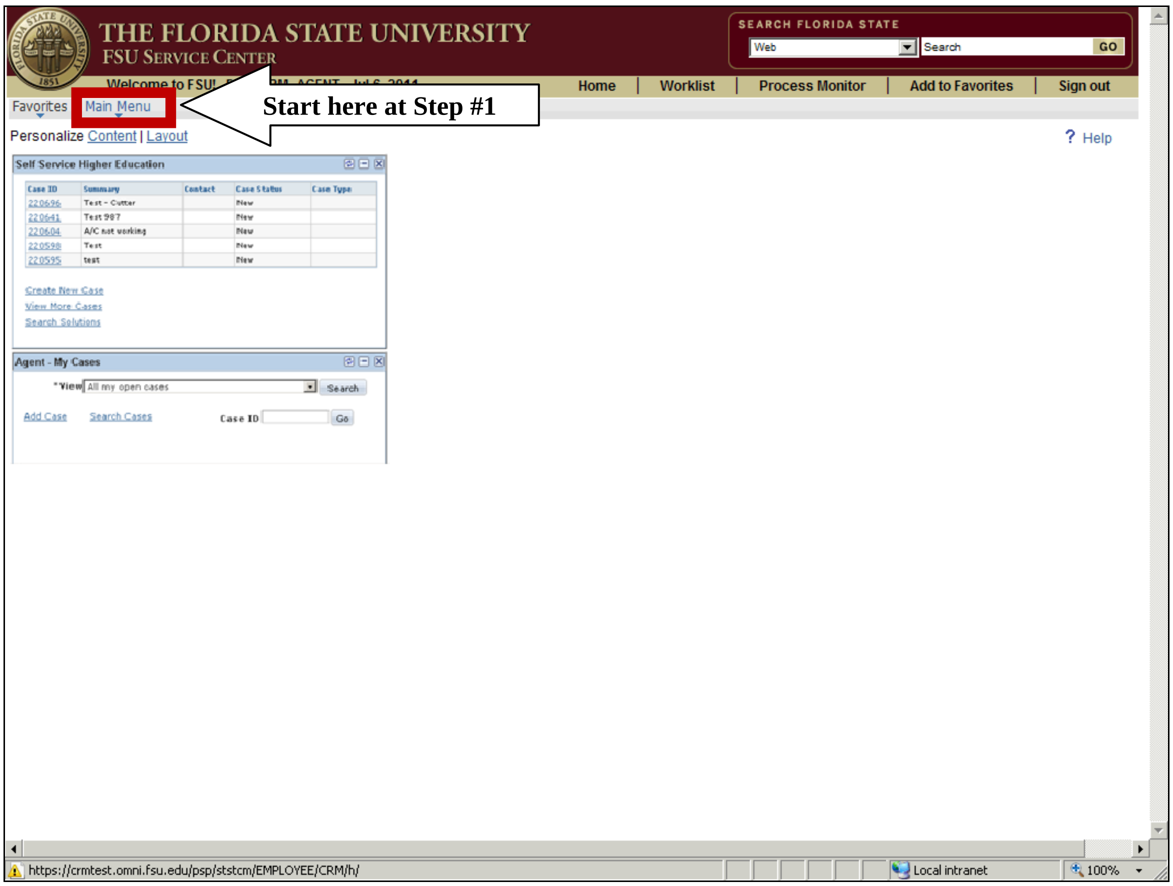
Constituent 360-Degree View - Agent

Overview:
Understanding the process of using Constituent 360-Degree View

Scenario:
In this topic, you will learn the steps to utilize Constituent 360-Degree View.

This topic will cover the following:

- Searching for a Customer
- Viewing customer interactions and case history
- Viewing an open case



Step	Action
1.	Click the **Main Menu** button.
2.	Click the **Constituent 360-Degree View** menu.
3.	Enter the appropriate search criteria in the Customer Search
4.	Click the **Search** button.
5.	Select the appropriate Customer name under the Search Results.
6.	**NOTE:** In the 360-Degree View you see a snapshot of the customer and their case history. **OPTIONAL:** Click any of the **folder** icons to expand the view of this customer's Cases and Interactions
7.	Click the appropriate **Date Range** to view a list of **Cases** and **Interactions**.
8.	For the purpose of this example, we will view the open cases for this customer by click the **Open** link. **NOTE:** You can also view the customers closed cases by clicking the **Closed link**. Secure Cases that you cannot view will be listed under **Unauthorized Cases.**
9.	If necessary, click on the appropriate **Case ID** to view the case information.
10.	**Congratulations!** You have completed this topic. **End of Procedure.**

Solving a Case - Agent

Overview:
Understanding how to solve a case with a unique solution not located in the Solutions Library.

Scenario:
In this topic, you will learn the steps to provide a solution to an open case and/or solve the case.

Key Information:
Emailing Outbound Notice from a Case

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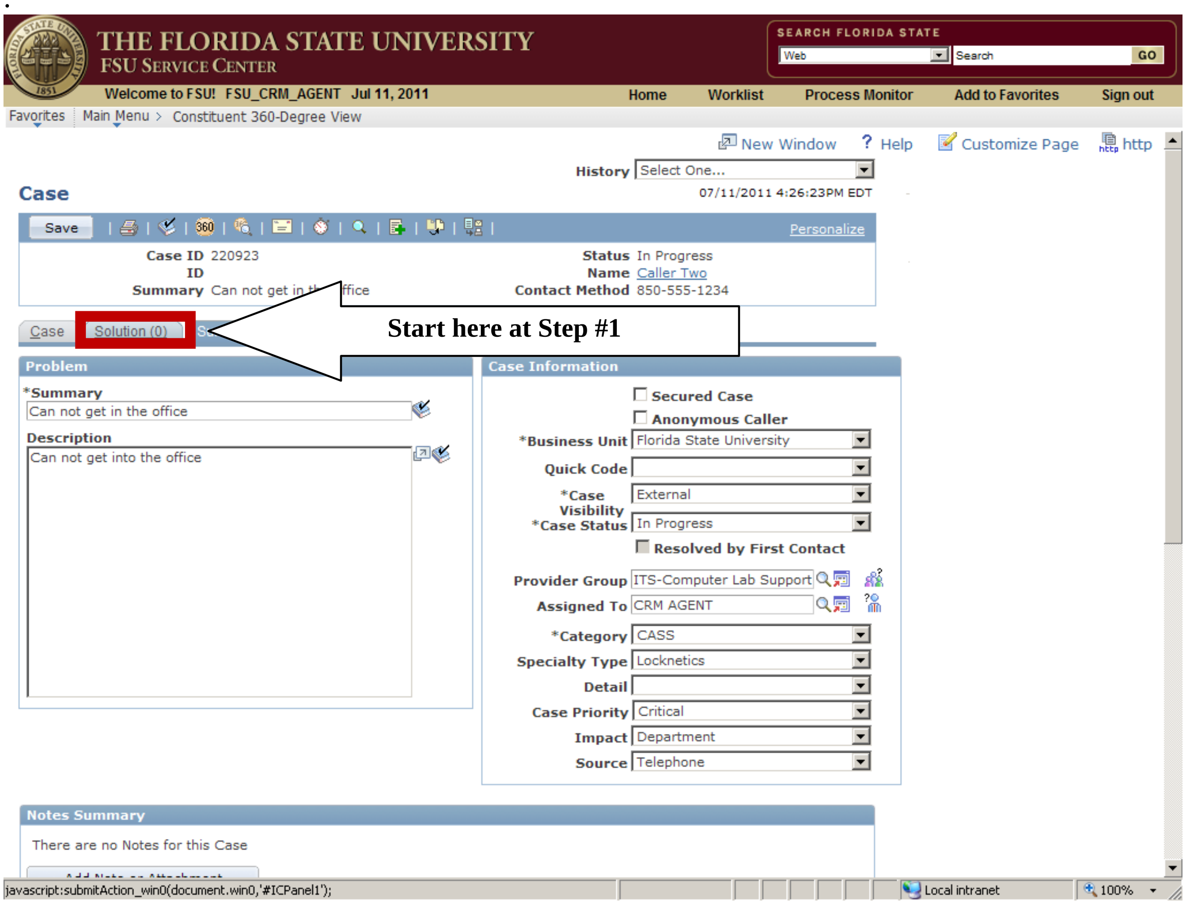


Step	Action
1.	From the **Summary** tab within an open case, click the **Solution (0)** tab.
2.	Click the **New Solution** tab.
3.	Provide the appropriate information into the **Enter New Solution** text field
4.	Click the **Attempt** button. **Note:** Attempt does not close the Case when saved Or Click the **Solve** button. **Note:** Solve will close the Case when saved
5.	Optional: Click the drop down list under ***Resolution Status** to view the list.
6.	Click the **Save** button. **NOTE:** Solving a case does NOT send an E-mail notification to the customer or to the Agent/Provider Group. For instructions on how to send an outbound notice, please refer to the section "**Emailing Outbound Notice from a Case**" found on page 18.
7.	To Email the solution or Note: Click the check box next to the solution.
8.	Click the button **Email**
9.	Under the list **Recipients**, check the appropriate name under **To, CC** or **BCC**. **NOTE:** If you need to add a recipient that is not listed please refer to the section "**Emailing Outbound Notice from a Case**" found on page 18.
10.	Click the **Send** link.
11.	Click the **Save** button.
12.	Congratulations! You have completed this topic. **End of Procedure.**

Emailing Outbound Notice from a Case - Agent

Overview:
Understanding how to send an outbound Email notice from the FSU Service Center

When providing updates or solutions to a customer, another agent or other interested parties, you will need to know how to send an email outbound notification from the FSU Service Center. Email notices are automatically sent in the following scenarios:

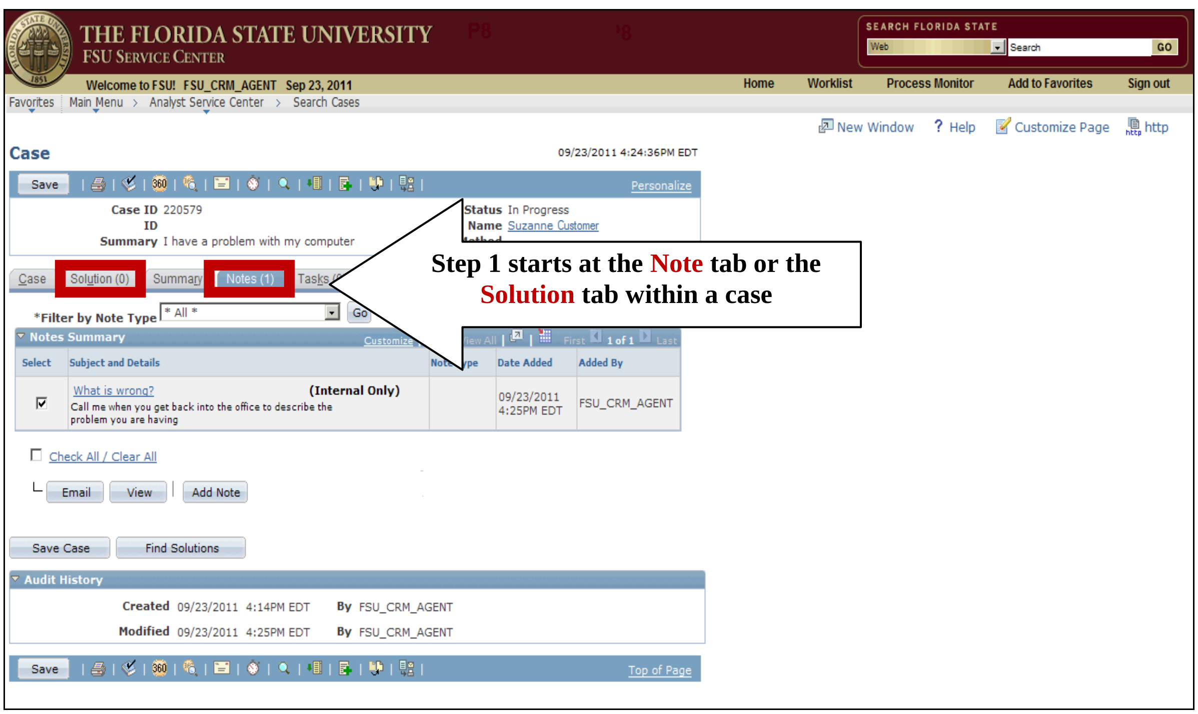
- New case is opened - Notice sent to Customer
- New Case is assigned to a Provider Group or Agent
- Case removed from worklist and re-assigned to an Agent or Provider Group

Outside of the above scenarios, agents must understand the steps to sending an outbound email notice from the Note tab or the Solution tab.

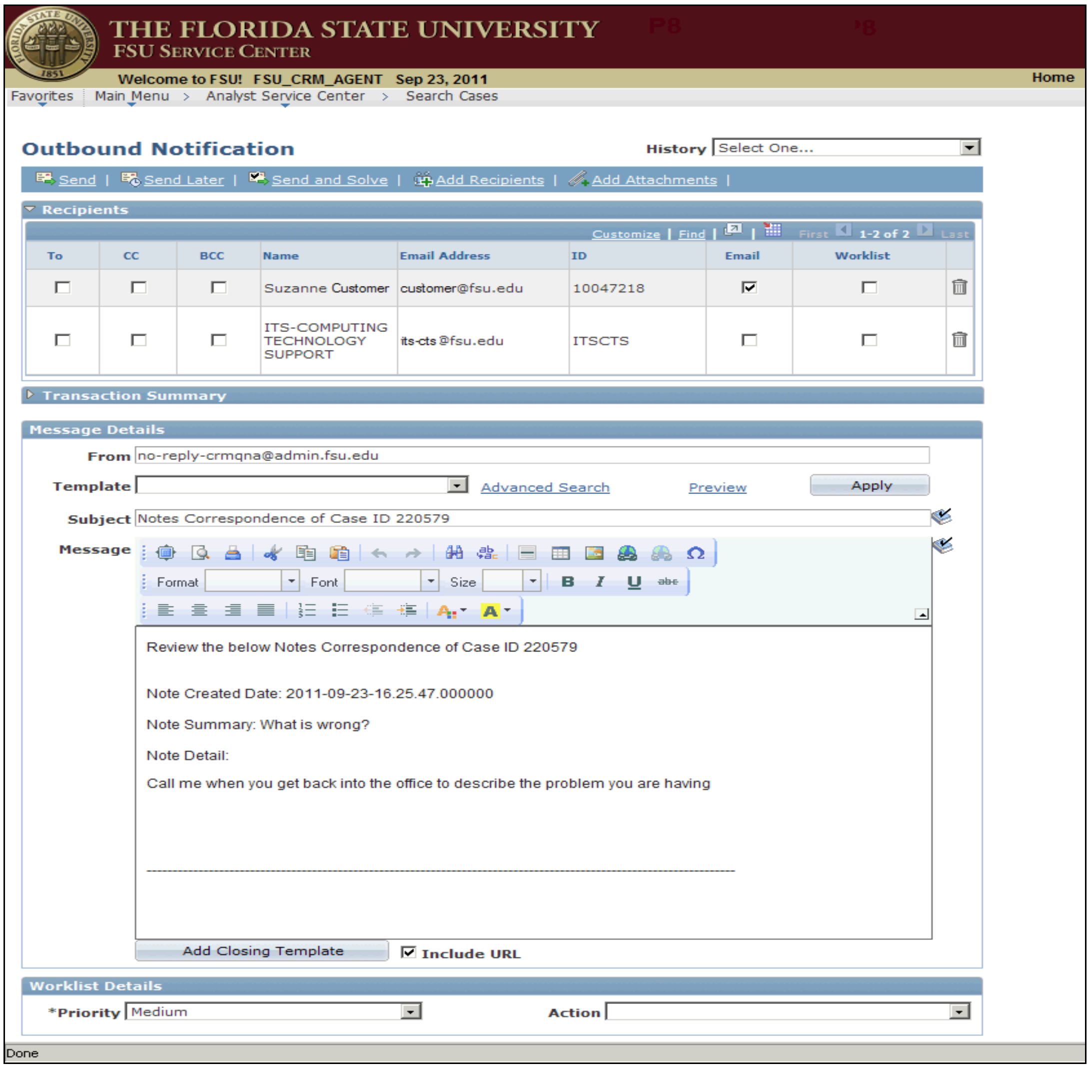
Scenario:
In this topic, you will learn the steps to send an email outbound notification from the FSU Service Center.

This feature can be used when sending an email update from the Note tab or sending a solution from the Solution tab.

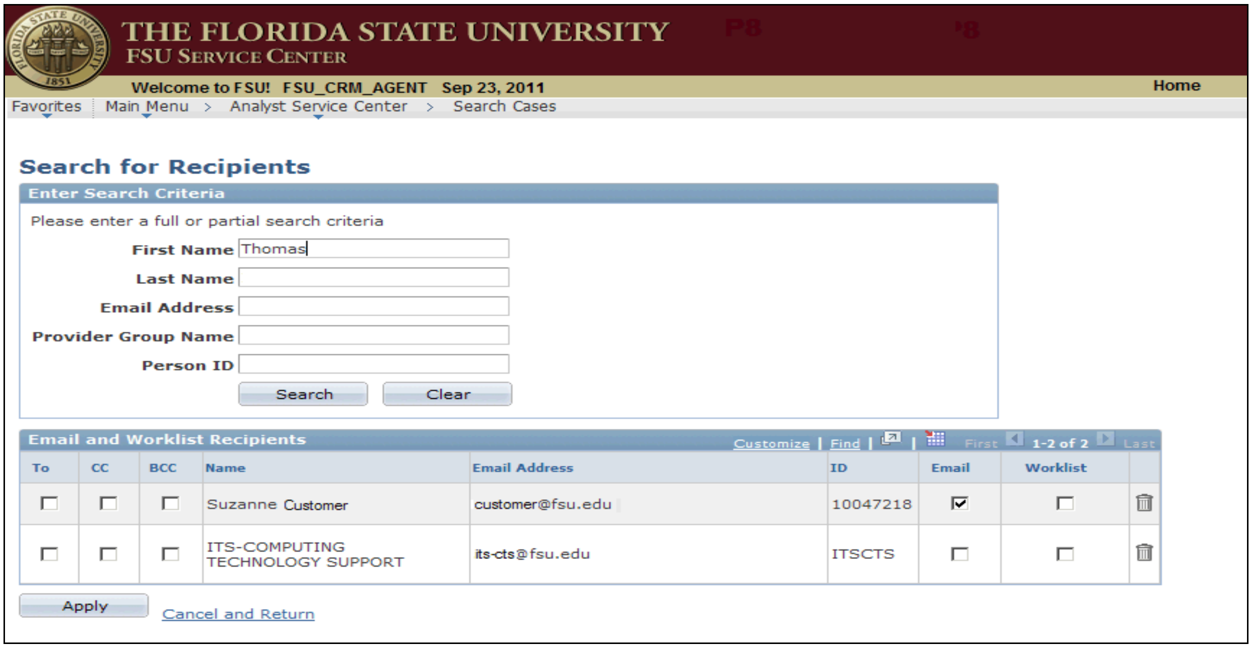
Key Information:
Adding a Note to a Case
Adding a Solution to a Case



Step	Action
1.	This exercise begins from the **NOTE** tab or **SOLUTION** tab within a case. The image above reflects and agent starting from the NOTE tab. Select the appropriate note or solution by checking the box under **Select.**
2.	Click the **Email** button. Email



Step	Action
3.	You can select the appropriate recipient from the list by checking next to the name under **To**, **CC** or **BCC** column. Adding an additional recipient is optional if a recipient is not listed. For the purpose of this example, we will add another recipient by clicking the **Add Recipients** link.



Step	Action
4.	**NOTE**: You can use a combination of search criteria such as **First name**, **Last Name**, **Email Address**, **Provider Group Name** or **Person ID**. Enter the appropriate search criteria.
5.	Click the **Search** button. Search
6.	Select the appropriate name from the **Search Results** by checking the box next to the name. Select
7.	Click the **Add to Recipient List** button. Add to Recipient List
8.	Click the **Apply** button. Apply
9.	Select the appropriate name(s) from the list under **Recipients** by checking the box next to the name under To, CC or Bcc.
10.	**OPTIONAL:** Check under **Worklist** if you would like this notice to appear in a recipient's worklist. This recipient should be an Agent; those recipients who are not agents will have the checkbox under Worklist disabled.
11.	Click the **Template** dropdown list. **NOTE:** These next three (3) steps are optional, a note can be sent without selecting a template.

Step	Action
12.	OPTIONAL: Select the appropriate **Template** from the list and/or click the **Add Closing Template** button. You can add additional information to the note, if necessary.
13.	Click the **Send** link.
14.	Click the **Save** button. 
15.	**Congratulations!** You have completed this topic **End of Procedure.**

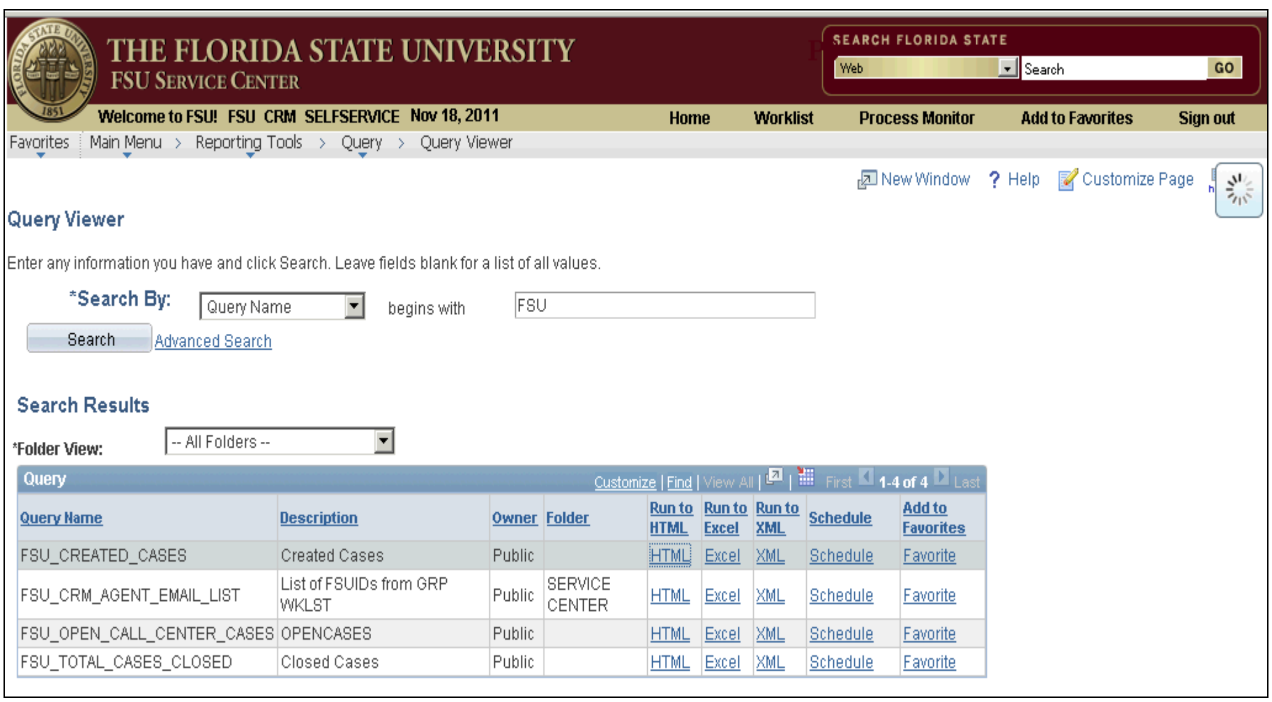
(NEW) How to use Queries to Run Reports - Agent

Overview:
Understanding how use the preset queries in the FSU Service Center to run and download reports.

All agents have the ability to run these preset queries that will list cases assigned to a Provider Group within a specified date range.

Scenario:
In this topic, you will learn the steps to access queries concerning open and closed cases with the FSU Service Center.

Step	Action
1.	Click the **Main Menu** link. Main Menu
2.	Click the **Reporting Tools** menu. Reporting Tools
3.	Click the **Query** menu. Query
4.	Click the **Query Viewer** menu. Query Viewer
5.	Next to the **begins with** field, "**FSU**".
6.	Click the **Search** button. Search
7.	**Decision:** Select from the queries listed: • FSU_CREATED_CASES (Cases created within a date range) • FSU_OPEN_CALL_CENTER_CASES (Open cases within a date range) • FSU_TOTAL_CASES_CLOSED (Closed cases within a date range)



Step	Action
8.	Click the **HTML** link under the column **Run to HTML** (recommended) HTML (A new window will open)
9.	Enter in the **SetID:** field "SHARE".
10.	Click the **Look up Group ID (Alt+5)** graphic to select the appropriate Provider Group. **NOTE:** You may need to scroll down to find the appropriate Provider Group
11.	Next to the **From Date:** or the **Closed From:** field, click the date/time graphic. Select the appropriate Date.
12.	By the **Through Date:** or the **Closed Through:** field, click the date/time graphic. Select the appropriate date.
13.	Click the View Results button. View Results
14.	**NOTE:** Results can be downloaded into an Excel, CSV or XML File. Recommended, click the **Excel SpreadSheet** link. Excel SpreadSheet
15.	Select to Open with or Save File.
16.	Click the **OK** button. OK
17.	**Congratulations!** You have completed the topic. End of Procedure.