



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

The screenshot displays the Oracle Service Center interface for The Florida State University. At the top, the header includes the FSU logo, the text 'THE FLORIDA STATE UNIVERSITY OMNI • HELPDESK', and a personalized welcome message: 'Welcome to FSU! DUNLAP, TANYA Aug 12, 2011'. Below the header are navigation links for 'Favorites', 'Main Menu', and 'Personalize Content | Layout'.

The main content area is divided into two sections:

- Self Service Higher Education:** This section contains a table with columns for Case ID, Summary, Contact, and Case Status. It lists three cases: 220780 (Add this to the ACL, Agent Working Case), 220773 (myFSU Account Issue, Agent Working Case), and 220649 (test, New). Below the table are links for 'Create New Case', 'View More Cases', and 'Search Solutions'. Callout boxes point to the table with the text 'Cases where you are listed as the Customer' and 'Open a Case if you are the customer'.
- Agent - My Cases:** This section features a 'View' dropdown menu set to 'All my open cases' and a 'Search' button. Below is a table with columns for Case ID, Name, Status, Priority, Summary, and Created Date. It lists five cases assigned to the agent, all with a status of 'In Progress'. Callout boxes point to the 'View' dropdown with the text 'Predefined Search Criteria', to the 'Case ID' column with 'Click Case ID to view Case Details', and to the table with 'Cases assigned to you as the Agent'.

At the bottom of the 'Agent - My Cases' section, there are links for 'Add Case' and 'Search Cases', along with a 'Case ID' input field and a 'Go' button.

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


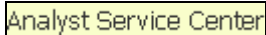



Add New Case via Analyst Service Center - Agent

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 . 
2.	Click the Analyst Service Center menu. 
3.	Click the Add Case menu. 
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 .  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 <u>one of these fields can be edited or changed</u> . 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. 
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

THE FLORIDA STATE UNIVERSITY
FSU SERVICE CENTER

Welcome to FSU CRM AGENT Jul 6, 2011

Home Worklist Process Monitor Add to Favorites Sign out

SEARCH FLORIDA STATE
Web Search GO

Favorites **Main Menu** Start here at Step #1

Personalize Content | Layout ? Help

Case ID	Summary	Contact	Case Status	Case Type
220626	Text - Cutlar		New	
220641	Text 297		New	
220641	A/C not working		New	
220528	Text		New	
220525	text		New	




Create New Case
View More Cases
Search Solutions

Agent - My Cases

*View All my open cases Search

Add Case Search Cases Case ID Go

https://crmtest.omni.fsu.edu/psp/ststcm/EMPLOYEE/CRM/h/ Local intranet 100%

Step	Action
1.	Click the Main Menu menu. 
2.	Click the My Worklist menu to view. 
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. 
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


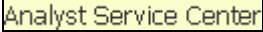
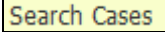
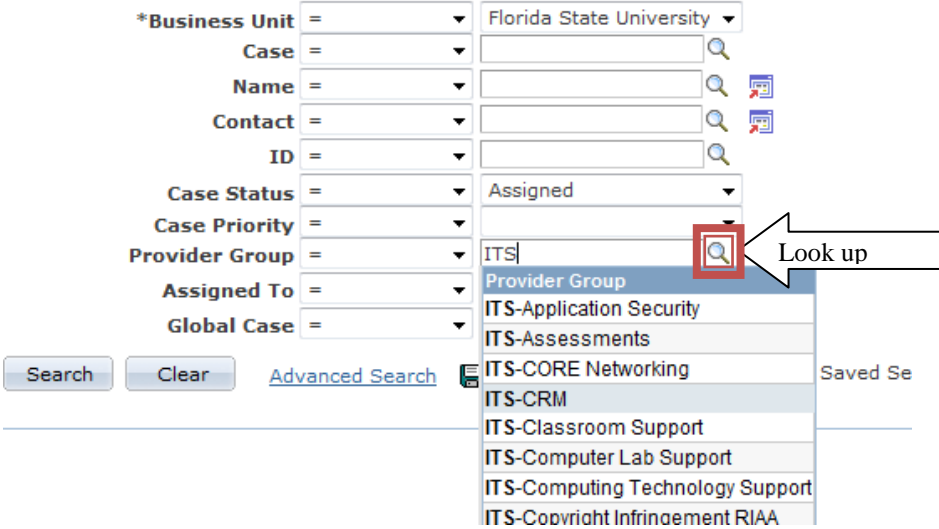

Scenario:

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.

The screenshot displays the Oracle CRM interface for The Florida State University Service Center. The page header includes the university logo and name, a search bar for Florida State, and a navigation menu with options like Home, Worklist, Process Monitor, Add to Favorites, and Sign out. The user is logged in as 'CRM AGENT' on 'Jul 6, 2011'. A red box highlights the 'Main Menu' link in the navigation area, with a callout box pointing to it that says 'Start here at Step #1'. Below the navigation, there are two main sections: 'Self Service Higher Education' and 'Agent - My Cases'. The 'Self Service Higher Education' section contains a table with the following data:

Case ID	Summary	Contact	Case Status	Case Type
220556	Text - Cutler		New	
220561	Text 987		New	
220564	A/C not working		New	
220558	Text		New	
220535	text		New	

Below the table are links for 'Create New Case', 'View More Cases', and 'Search Solutions'. The 'Agent - My Cases' section has a search dropdown set to 'All my open cases' and a 'Search' button. At the bottom, there is an 'Add Case' link, a 'Search Cases' link, a 'Case ID' input field, and a 'Go' button. The browser address bar shows the URL: <https://crmtest.omni.fsu.edu/psp/ststcm/EMPLOYEE/CRM/h>.

Step	Action
6.	Click the Main Menu 
7.	Click the Analyst Service Center menu item. 
8.	Click Search Cases menu item 
9.	<p>Under Search, enter the appropriate search criteria in the fields.</p> <p>NOTE: You can use one or multiple criteria options to search.</p> <p>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</p> 
10.	Click the Search Button NOTE: Search criteria can be saved by clicking on the link 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 Manager, 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:


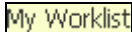




In this topic you will learn the steps to assign a case listed in your Provider Group Worklist to an agent.

Key Information:

Viewing a Worklist for a Provider Group

The screenshot displays the Oracle CRM interface for The Florida State University Service Center. At the top, there is a search bar for Florida State and a navigation menu with options like Home, Worklist, Process Monitor, Add to Favorites, and Sign out. Below the navigation, there are links for Favorites, Personalize Content, Layout, and Help. The main content area is divided into two sections: 'Self Service Higher Education' and 'Agent - My Cases'. The 'Self Service Higher Education' section contains a table with columns for Case ID, Summary, Contact, Case Status, and Case Type. The 'Agent - My Cases' section includes a search dropdown and a search button. A red box highlights the 'Main Menu' link in the Favorites section, with a white arrow pointing to it and the text 'Start here at Step #1'.

Case ID	Summary	Contact	Case Status	Case Type
22.0536	Text - Course		New	
22.0541	Text 297		New	
22.0534	A/C not working		New	
22.0538	Text		New	
22.0535	text		New	

Step	Action
1.	Click the Main Menu menu. 
2.	Click the My Worklist menu. 
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. 
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. 
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

THE FLORIDA STATE UNIVERSITY
FSU SERVICE CENTER

SEARCH FLORIDA STATE
Web Search GO

Home Worklist Process Monitor Add to Favorites Sign out

Favorites **Main Menu** Start here at Step #1

Personalize Content | Layout ? Help

Case ID	Summary	Contact	Case Status	Case Type
220526	Text - Cutler		New	
220541	Text 297		New	
220564	A/C not working		New	
220528	Text		New	
220535	text		New	


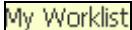



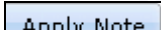
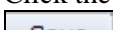


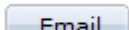

Create New Case
View More Cases
Search Solutions



Agent - My Cases

*View All my open cases Search

Add Case Search Cases Case ID Go

https://crmtest.omni.fsu.edu/psp/ststcm/EMPLOYEE/CRM/h Local Intranet 100%

Step	Action
1.	Click the Main Menu menu. 
2.	Click the My Worklist menu. 
3.	Click the appropriate case number from the Worklist items column to view the case.
4.	Click the Notes () tab.  *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. 
8.	Optional: Click the Note Type list to mark this note as a Comment . 
9.	Click the Apply Note button. 
10.	Click the Save button.  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.  
12.	Click the button Email 
13.	Under the list Recipients , check the appropriate name under To, CC or BCC .  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


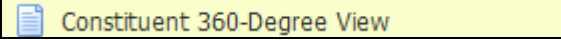
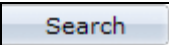


Overview:
Understanding the process of using Constituent 360-Degree View

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.

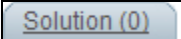
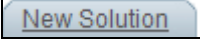
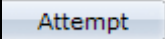
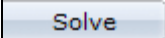
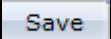
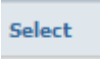

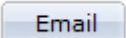
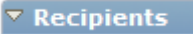

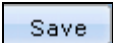
Solving a Case - Agent

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

The screenshot displays the Oracle CRM interface for The Florida State University FSU Service Center. The page header includes the university logo and name, a search bar, and navigation links like 'Home', 'Worklist', and 'Process Monitor'. The main content area shows a case summary for Case ID 220923, with a status of 'In Progress'. A red box highlights the 'Solution (0)' button, with an arrow pointing to it and the text 'Start here at Step #1'. The interface includes sections for 'Problem' (Summary and Description), 'Case Information' (Business Unit, Case Status, etc.), and 'Notes Summary'. The browser address bar shows 'Local intranet' and '100%' zoom.

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.

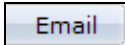
This feature can be used when sending an email update from the Note tab or sending a solution from the Solution tab.

Key Information:

Adding a Note to a Case

Adding a Solution to a Case

The screenshot displays the Oracle Service Center interface for The Florida State University. The page title is 'THE FLORIDA STATE UNIVERSITY FSU SERVICE CENTER'. The user is logged in as 'FSU_CRM_AGENT' on 'Sep 23, 2011'. The main content area shows a case with ID 220579 and summary 'I have a problem with my computer'. The case status is 'In Progress' and the customer name is 'Suzanne Customer'. The 'Notes (1)' tab is selected, showing a note with the subject 'What is wrong?' and the text '(Internal Only) Call me when you get back into the office to describe the problem you are having'. The note was added on 09/23/2011 at 4:25PM EDT by FSU_CRM_AGENT. A callout box with a white background and black border points to the 'Notes (1)' tab and contains the text: 'Step 1 starts at the Note tab or the Solution tab within a case'. The interface includes a navigation menu, a search bar, and various utility buttons like 'Save', 'Email', and 'Add Note'.

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

Step	Action
3.	<p>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.</p> <p>For the purpose of this example, we will add another recipient by clicking the Add Recipients link.</p>

Search for Recipients

Enter Search Criteria

Please enter a full or partial search criteria

First Name:

Last Name:

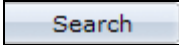
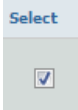
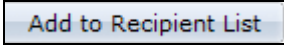

Email Address:

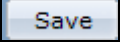
Provider Group Name:

Person ID:

To	CC	BCC	Name	Email Address	ID	Email	Worklist
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Suzanne Customer	customer@fsu.edu	10047218	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ITS-COMPUTING TECHNOLOGY SUPPORT	its-cts@fsu.edu	ITSCTS	<input type="checkbox"/>	<input type="checkbox"/>

[Cancel and Return](#)

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. 
6.	Select the appropriate name from the Search Results by checking the box next to the name. 
7.	Click the Add to Recipient List button. 
8.	Click the Apply button. 
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.

THE FLORIDA STATE UNIVERSITY
FSU SERVICE CENTER

SEARCH FLORIDA STATE
Web Search GO

Welcome to FSU CRM AGENT Jul 6, 2014 Home Worklist Process Monitor Add to Favorites Sign out




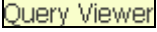
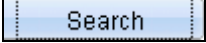
Favorites **Main Menu** Start here at Step #1
Personalize Content | Layout ? Help

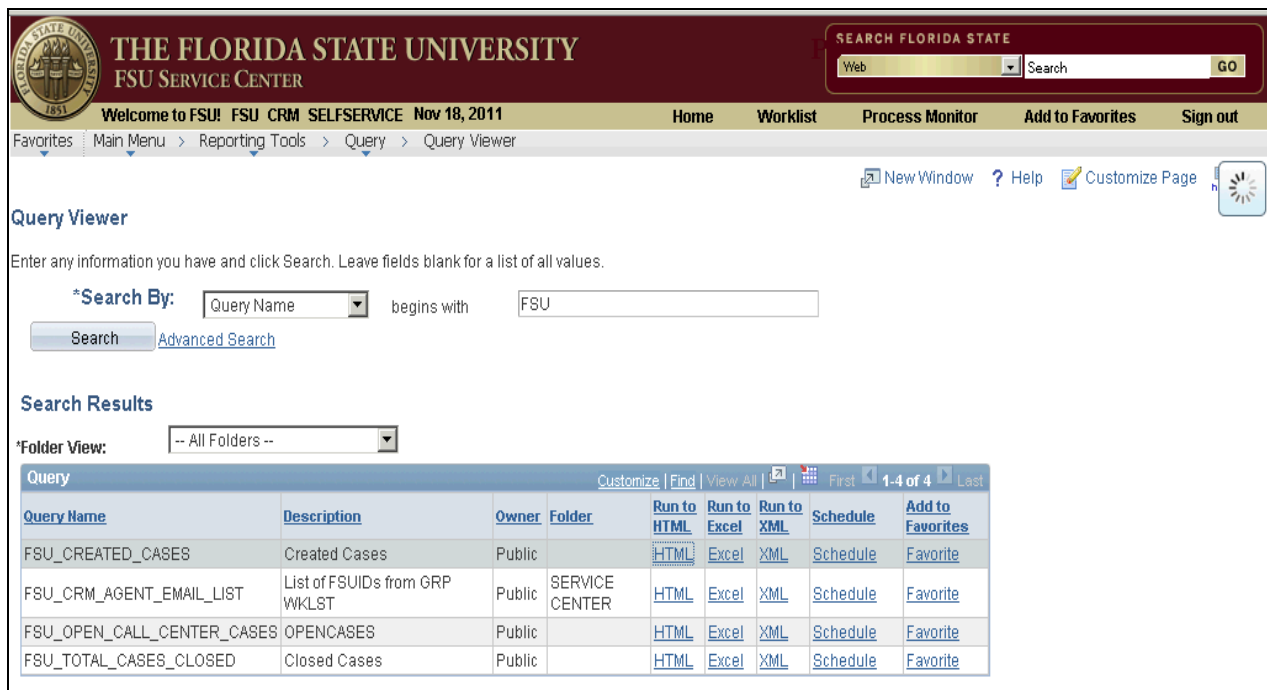
Case ID	Summary	Contact	Case Status	Case Type
22.0596	Text - Cumber		New	
22.0541	Text 997		New	
22.0604	A/C not working		New	
22.0598	Text		New	
22.0595	text		New	

Create New Case
View More Cases
Search Solutions

Agent - My Cases
*View All my open cases Search
Add Case Search Cases Case ID: Go

https://crmtest.omni.fsu.edu/psp/ststcm/EMPLOYEE/CRM/h/ Local intranet 100%

Step	Action
1.	Click the Main Menu link. 
2.	Click the Reporting Tools menu. 
3.	Click the Query menu. 
4.	Click the Query Viewer menu. 
5.	Next to the begins with field, " FSU ".
6.	Click the Search button. 
7.	Decision: Select from the queries listed: <ul style="list-style-type: none"> • 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)



THE FLORIDA STATE UNIVERSITY
FSU SERVICE CENTER

Welcome to FSU! FSU CRM SELFSERVICE Nov 18, 2011

Home Worklist Process Monitor Add to Favorites Sign out

Favorites: Main Menu > Reporting Tools > Query > Query Viewer

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.





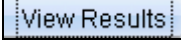

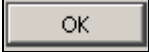
*Search By: Query Name begins with FSU

Search Advanced Search

Search Results

*Folder View: -- All Folders --

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
FSU_CREATED_CASES	Created Cases	Public		HTML	Excel	XML	Schedule	Favorite
FSU_CRM_AGENT_EMAIL_LIST	List of FSUIDs from GRP WKLST	Public	SERVICE CENTER	HTML	Excel	XML	Schedule	Favorite
FSU_OPEN_CALL_CENTER_CASES	OPENCASES	Public		HTML	Excel	XML	Schedule	Favorite
FSU_TOTAL_CASES_CLOSED	Closed Cases	Public		HTML	Excel	XML	Schedule	Favorite

Step	Action
8.	Click the HTML link under the column Run to HTML (recommended)  (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. 
14.	NOTE: Results can be downloaded into an Excel, CSV or XML File. Recommended, click the Excel SpreadSheet link. 
15.	Select to Open with or Save File.
16.	Click the OK button. 
17.	Congratulations! You have completed the topic. End of Procedure.