

## INTRODUCTION TO CaseConnect

**Only active cases as of APRIL 20<sup>th</sup>, 2015**

### WHAT IS CaseConnect?

CaseConnect is a tool designed to enhance the ability for U-M faculty and staff to **view** and **interact** with active cases which were created through service requests submitted to the SSC.

### WHAT DOES CaseConnect PROVIDE YOU?

- Seamless integrated communication between you and the SSC
- Ability to view active cases in which you are the Requestor or are on the watch list
- Ability to attach supporting documentation
- Ability to request other users to have access to your active case

### HOW WILL THE CUSTOMER USE CaseConnect?

- Login to CaseConnect anytime to view active cases, attach documentation, or add additional comments *NOTE: Service requests submitted through hard documents will not show in your active cases as you are not the Requestor*
- Receive email notifications with a direct link to a specific case when the SSC needs additional information or documentation for the case
- Receive email notification anytime the Additional Comments field is updated
- Add users to a “Watch List” enabling them to view a specific case, add documentation, and additional comments

### HOW DOES THE CUSTOMER ACCESS CaseConnect?

Access to CaseConnect is through a link on the Shared Services Center website (ssc.umich.edu)

### WHAT DOES CaseConnect LOOK LIKE?

*CaseConnect Home Page. Click the link to the case number you wish to access.*

The screenshot shows the CaseConnect Shared Service Center interface. At the top, there is a navigation bar with the University of Michigan logo and the user name 'Malcolm Reynolds | Logout'. Below this is a header for 'CaseConnect Shared Service Center' and a 'Case Managements' section with a search icon and pagination controls (1 to 2 of 2). The main content is a table with the following columns: Number, State, Requestor, Watch list, Short description, Assignment group, Transaction Reference, Created, and Updated. Two cases are listed:

Number	State	Requestor	Watch list	Short description	Assignment group	Transaction Reference	Created	Updated
CM0551657	Work in Progress	Malcolm Reynolds	Linda Fyfe	Invoice 12345 for XYZ Company	Accounts Payable		2015-07-24 11:02:55	2015-07-24 11:02:55
CM0551658	Work in Progress	Malcolm Reynolds		Invoice 7890 for Orange Bowl alumni event	Accounts Payable		2015-07-24 11:04:43	2015-07-24 11:04:43

At the bottom of the table, there is an 'Actions on selected rows...' dropdown menu and another pagination control (1 to 2 of 2).

# ANATOMY OF CaseConnect



**1. Attach documentation here**

CaseConnectShared Service Center

Case Management - CM0551657

Number: CM0551657      State: Work in Progress

Requestor: Malcolm Reynolds      Contact type: Email

Requested for: [Redacted]      Opened: 2015-07-24 11:00:46

Assignment group: Accounts Payable      Transaction Reference: [Redacted]

Watch list: Linda Fyfe

Short description: Invoice 12345 for XYZ Company

Description: Please process the attached invoice.

Additional comment (customer visible): **2. Add Additional Comments here**

Activity: 2015-07-24 11:02:55 Linda Fyfe Changed: Assignment group, State, Email  
 Assignment group: Accounts Payable  
 State: Work in Progress  
 Email: ssc-admin@umich.edu

Save      **3. Click Save**

## KEY FIELDS IN CaseConnect

- **Number** = Unique ServiceLink case number
- **Requestor** = Customer requesting service
- **Requested for** = Customer requesting service on behalf of someone else
- **Assignment group** = SSC team the case is assigned to
- **State** = Identifies the status of the case in the workflow:
  - *New*: Default for new cases
  - *Work in progress*: Case is assigned; the SLA clock is ticking.
  - *Pending*: SLA has paused while the SSC waits on someone outside of the SSC to complete an action
  - *Resolved*: Case is resolved (Stays in view for 5 days)
- **Watch list** = Other individual(s) who have access to view/interact with the case
- **Short Description** = Describes the service request
- **Description** = Optional comment field to add more descriptive information
- **Pending Reason** = Indicates why the case state is pending
- **Contact type** = How the customer contacted the SSC
- **Opened** = Date and time when the case was created
- **Transaction Reference** = May include information such as Vendor/Voucher ID
- **Additional Comments** = CUSTOMERS CAN ADD COMMENTS HERE
- **Activity** = Logs every action within the case; the activity is date stamped and displays in a chronological list for reference.