SHARED SERVICES CENTER
UNIVERSITY OF MICHIGAN

INTRODUCTION TO CaseConnect
Only active cases as of APRIL 20th, 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?

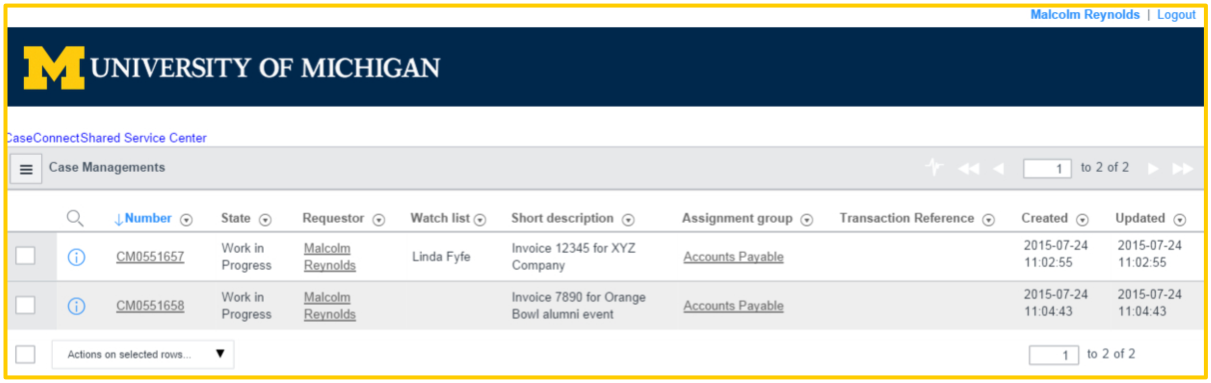
- Login to CaseConnect anytime to view active cases, attach documentation, or add additional comments *NOTE: Service requests submitted through hard documents will not show in your active cases as you are not the Requestor*
- Receive email notifications with a direct link to a specific case when the 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.



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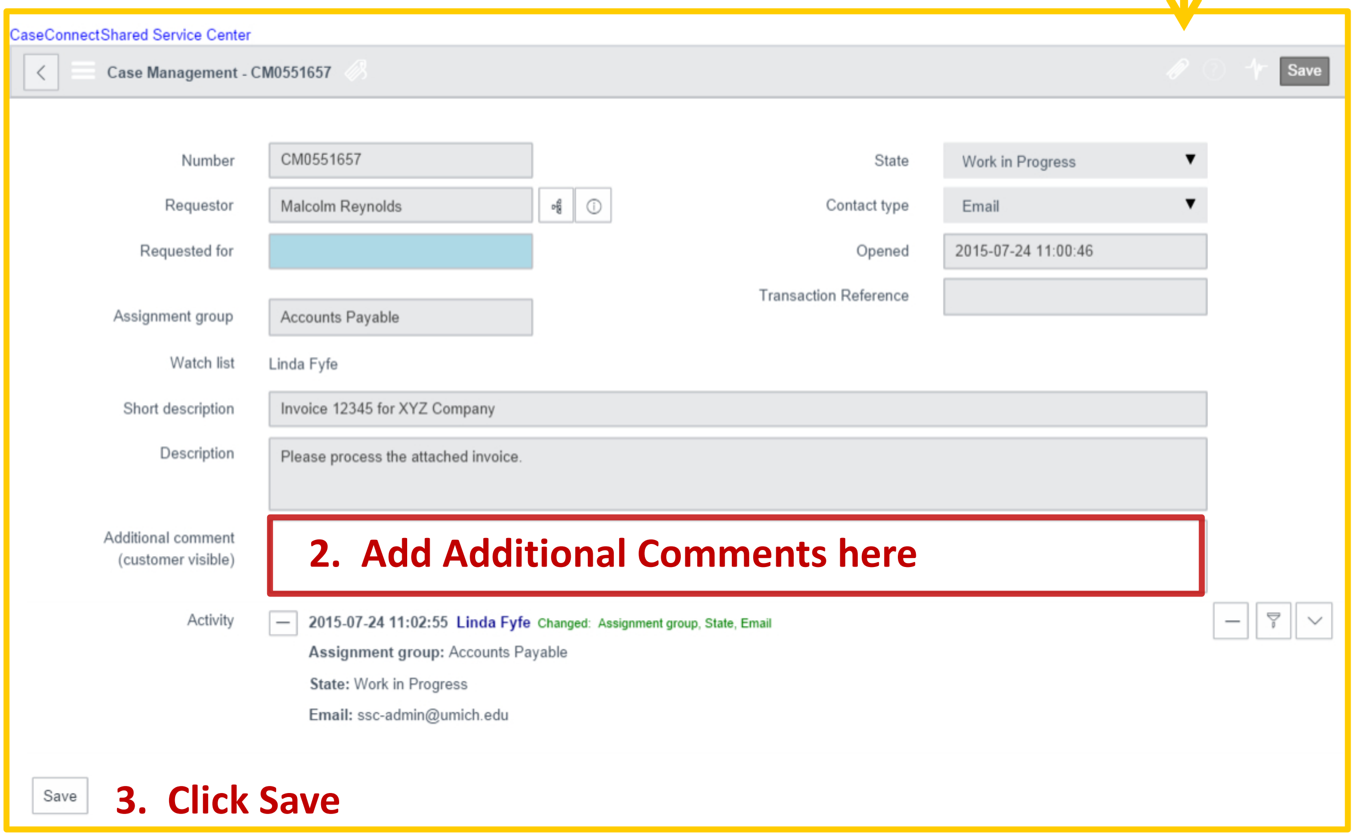
ANATOMY OF CaseConnect

1. Attach documentation here



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.