

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.

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.

CaseConnect FAQ's

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WHAT DOES CaseConnect PROVIDE YOU?

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

HOW WILL I USE CaseConnect?

- Login to CaseConnect anytime to view your active cases, communicate with the SSC about the case, or attach documentation
- Receive email notifications with a direct link to a specific case when the SSC needs additional information or documentation for the case

HOW DO I ACCESS CaseConnect?

Access to CaseConnect is through a link on the Shared Services Center website (ssc.umich.edu). You will authenticate using your unickname and UMICH password.

DO I HAVE TO USE CaseConnect?

CaseConnect is the preferred primary method of communication for your active cases. As you use CaseConnect, should you find it necessary to contact the SSC for further information, don't hesitate to call us or email us.

I HAVE ACTIVE CASES THAT WERE CREATED BEFORE APRIL 20. WHY ARE THOSE NOT SHOWING IN MY LIST OF ACTIVE CASES?

Only cases created on and after April 20, 2015 will be accessible in CaseConnect while they are in Active status.

AM I ABLE TO ACCESS ALL MY CASES, EVEN THOSE THAT ARE NO LONGER ACTIVE?

No. Only cases in Active status are accessible. Once the case is completed, you will no longer be able to access it.

I USED THE ADDITIONAL COMMENTS FIELD TO SEND SUPPORTING INFORMATION TO THE SSC. CAN I EXPECT A RESPONSE FROM THE SSC?

The SSC team assigned to the case will continue to work on the case within the service level agreement timeframe in place for that service. They will reach out to you if they need further information.

Important! To protect privacy, please do not include personal or sensitive information in the Additional Comments field, such as social security number, medical conditions, medications, credit card information, bank account numbers.

WHAT IS THE WATCH LIST?

The watch list is an optional feature that allows other U-M faculty and staff access to your active case, if requested by you. Anyone added to the Watch List has full access to the case and so can add comments, add and delete attachments. **ONLY the Requestor on the case can request that others be added to the watch list.**

It is recommended that the watch list is used infrequently and for more complicated or critical cases when the Requestor is unavailable to monitor the activity on the case (e.g., out of the office).

I WOULD LIKE TO ADD MY UNIT ADMINISTRATOR TO THE WATCH LIST FOR ONE OF MY CASES. HOW DO I DO THAT?

You are not able to add people to the watch list directly but you can request it. The recommended method is to enter an Additional Comment in the case requesting that the SSC add the person to the - case. To ensure the correct person is added, include the person's first and last name and either their username or U-M ID.

If necessary, you may also call the SSC Contact Center with your request, providing the first and last name of the person to be added, and their username or U-M ID. The Contact Center associate will locate the case in ServiceLink, and add a comment in the Additional Comments (e.g., "Please respond to confirm your request to add [First Name] [Last Name], [username] or [U-M ID]."). This will trigger an email notification to you, which you must respond to (either through the email message or through Additional Comments in the case), confirming that you authorized the addition of the individual to your case. The Contact Center associate or the SSC transaction team assigned to the case will add the person to the case watch list.