



INFORMATION TECHNOLOGY SERVICES

CRM Agent Training Running Statistical Queries

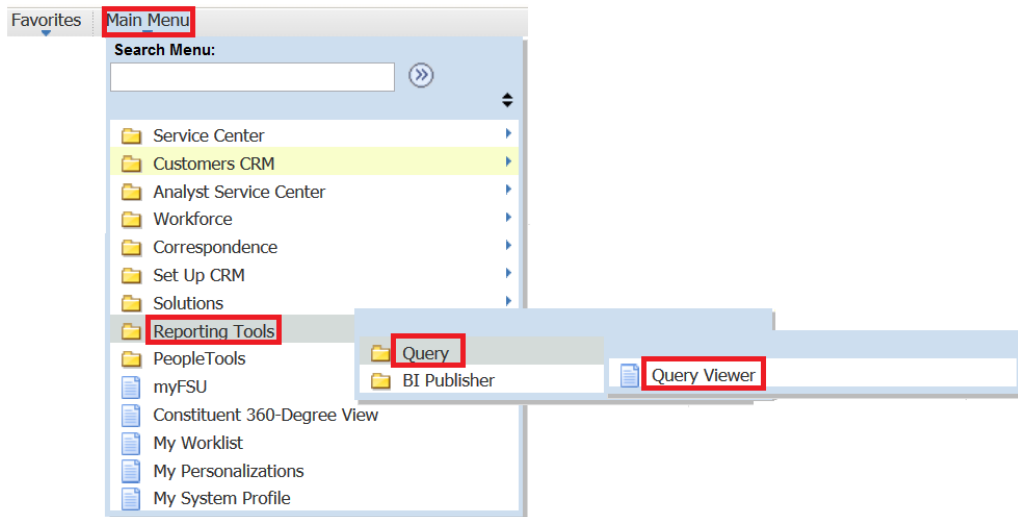
Service Management Deployment

February 5, 2015

Overview

This Job Aid includes step-by-step instructions for obtaining case statistics in the FSU Service Center (CRM).

1. Log in to servicecenter.fsu.edu.
2. Navigate to the **Main Menu** and select **Reporting Tools**. Select **Query**. Select **Query Viewer**.



3. To search for available Service Center Queries, enter “**fsu_**” into the search field and select **Search**.

Query Viewer

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

*Search By begins with
 [Advanced Search](#)



4. Searching “FSU_” will return the following results. This allows you to select what type of query you would like to run.

Query Viewer

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

*Search By begins with
 [Advanced Search](#)

Search Results

*Folder View

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
FSU_BI_ISSUES_OUTSTANDING	BI Issues Outstanding	Public	ERP REPORTING	HTML	Excel	XML	Schedule	Favorite
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_CTD_COMPETENCY		Public	SERVICE CENTER	HTML	Excel	XML	Schedule	Favorite
FSU_FA_CASES_CREATED		Public	FINANCIAL AID	HTML	Excel	XML	Schedule	Favorite
FSU_FA_OUTSTANDING_CASES	Financial Aid Supervisor Repor	Public	FINANCIAL AID	HTML	Excel	XML	Schedule	Favorite
FSU_FA_RESOLVED_CASES		Public	FINANCIAL AID	HTML	Excel	XML	Schedule	Favorite
FSU_FIN_ISSUES_OUTSTANDING	Fin Issues Outstanding	Public	ERP FINANCIAL	HTML	Excel	XML	Schedule	Favorite
FSU_FIN_ISSUES_RECEIVED	Fin Issues Rec'd Council Rpt	Public	ERP FINANCIAL	HTML	Excel	XML	Schedule	Favorite
FSU_FIN_ISSUES_RESOLVED	Fin Issue Resolved Council Rpt	Public	ERP FINANCIAL	HTML	Excel	XML	Schedule	Favorite
FSU_OPEN_CALL_CENTER_CASES	OPENCASES	Public		HTML	Excel	XML	Schedule	Favorite
FSU_PROVIDER_GROUP_AND_AGENT_L		Public		HTML	Excel	XML	Schedule	Favorite
FSU_TOTAL_CASES_CLOSED	Closed Cases	Public		HTML	Excel	XML	Schedule	Favorite

5. To get case statistics, Service Management recommends Provider Group Managers run the following queries:

FSU_CREATED_CASES: Provides a list of cases that have been created

FSU_OPEN_CALL_CENTER_CASES: Provides a list of cases that are currently open

FSU_TOTAL_CASES_CLOSED: Provides a list of cases that have been closed

*Please note: the instructional steps for running these three queries are identical.





- Select the Query you would like to run by selecting how you would like the information displayed.


Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
FSU_BI_ISSUES_OUTSTANDING	BI Issues Outstanding	Public	ERP REPORTING	HTML	Excel	XML	Schedule	Favorite
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_CTD_COMPETENCY		Public	SERVICE CENTER	HTML	Excel	XML	Schedule	Favorite
FSU_FA_CASES_CREATED		Public	FINANCIAL AID	HTML	Excel	XML	Schedule	Favorite
FSU_FA_OUTSTANDING_CASES	Financial Aid Supervisor Repor	Public	FINANCIAL AID	HTML	Excel	XML	Schedule	Favorite
FSU_FA_RESOLVED_CASES		Public	FINANCIAL AID	HTML	Excel	XML	Schedule	Favorite
FSU_FIN_ISSUES_OUTSTANDING	Fin Issues Outstanding	Public	ERP FINANCIAL	HTML	Excel	XML	Schedule	Favorite
FSU_FIN_ISSUES_RECEIVED	Fin Issues Rec'd Council Rpt	Public	ERP FINANCIAL	HTML	Excel	XML	Schedule	Favorite
FSU_FIN_ISSUES_RESOLVED	Fin Issue Resolved Council Rpt	Public	ERP FINANCIAL	HTML	Excel	XML	Schedule	Favorite
FSU_OPEN_CALL_CENTER_CASES	OPENCASES	Public		HTML	Excel	XML	Schedule	Favorite
FSU_PROVIDER_GROUP_AND_AGENT_L		Public		HTML	Excel	XML	Schedule	Favorite
FSU_TOTAL_CASES_CLOSED	Closed Cases	Public		HTML	Excel	XML	Schedule	Favorite


- Populate the SetID field with **SHARE**. Select the search icon to select the Provider Group you would like to run the report for.

FSU_CREATED_CASES - Created Cases

SetID: 

Group ID: 

From Date: 

Through Date: 



The search icon will show:

The screenshot shows a search window with the following details:

- Search by:** Provider Group ID begins with
- Buttons: Look Up, Cancel, Advanced Lookup
- Search Results:** View 100, First, 1-122 of 122, Last
- Table:**

Provider Group ID	Provider Group Name
ACTPAY	CNTL-Accounts Payable
ADMAPPGEN	Admissions-Application Problems (General)
ADMAPPSPEC	Admissions-Application Problems (Specialist)
ADMIS	Admissions-Admissions and Records IT Support
ASSET	CNTL-Asset and Property Management
ATHIT	Athletics IT Support
BBFAC	Blackboard-Faculty/Instructor
BBSTU	Blackboard-Student/Other
BUDGET	Budget Office
CAPSIT	ITAPP - Center for Advanced Power Systems IT
CASSSEC	Campus Access and Security Services (CASS)
CCI	College of Communication and Information IT
CHS	ITAPP - College of Human Sciences IT Support
COB	ITAPP - College of Business IT Support
COITS	Controllers Office IT Support
COL	ITAPP - College of Law IT Support
DATA	ITS-Data Services
DODD	College of Arts and Sciences IT Support
DOF	Faculty Development and Advancement
ERPOD	ERP-OMNI Default
ERPOF	ERP-OMNI Financials
ERPOHR	ERP-OMNI HR

- Select your Provider Group by selecting the blue **Provider Group ID** to the left of the **Provider Group Name**.
- Enter the date range for the report by selecting the calendar icon to the right of the **From Date** and **Through Date** fields.

FSU_CREATED_CASES - Created Cases

SetID:

Group ID:

From Date:

Through Date:

- Select **View Results**.

FSU_CREATED_CASES - Created Cases

SetID:

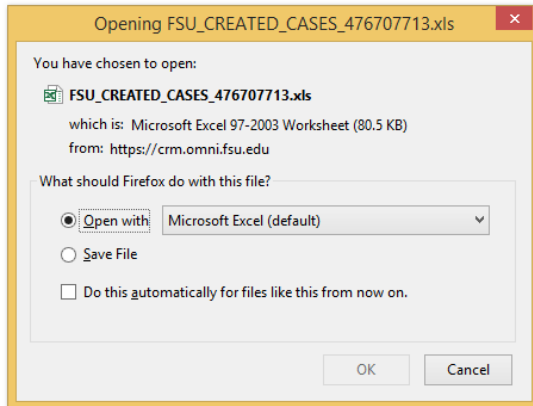
Group ID:

From Date:

Through Date:



When **View Results** is selected, the following info box will pop up:



11. Select **OK**.

*Results will open in a new window.

