EbSuite

Agent Guide for Creating & Managing Cases

IT Training & Development
(818) 677-1700
training@csun.edu
www.csun.edu/it/training
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**INTRODUCTION**

EbSuite is CSUN’s IT case tracking system. It is utilized by campus IT support. Users can complete a Request for Technology Support that is accessed on the Technology pagelet in the portal. The case will automatically route itself depending on the options the user chooses. The case system is also used by technology support personnel around campus to manage and route technology requests. Designated agents within a college or department have access to the cases to be worked. Agents can also input cases and route them to the appropriate areas.

**CREATING A NEW CASE**

Cases should be created for all types of calls or requests for help, assistance or service, regardless of who is responsible for the resolution. A case should be created to report a problem with equipment, a type of service, or a software application. Cases should also be created for service requests like software installations or if assistance is needed.

To create a new case:

1. **Login to EbSuite** via your web browser at [http://support.csun.edu/iLoginCSUN.jsp](http://support.csun.edu/iLoginCSUN.jsp) with your CSUN username and password.

2. The **Customer Support** page displays.
3. Go to Case > New.

4. The Create Case page displays.

5. To create a new case, enter data in the following fields:
   a. Case Name (Mandatory) – Enter a short description of the case.
   b. Client (Mandatory) – To select a client:
      • Select the Go button to go directly to the Client Selection Popup page.
Select the **Search LDAP** button on the bottom left hand corner.

I. The **LDAP Search** window displays.

II. Enter, at minimum, the **First Name** and **Last Name** of the client. If you enter more information, your search will be more refined.

III. Select the **Search** button.

IV. If a client name appears, select the **Save** link to select it.

V. If a client name **does not** appear in LDAP, select the **Quick Create** button and enter as much information as possible.

VI. Select the **Create Client** button to complete the quick create process.
c. **Assign To** (Mandatory) – By default, the agent who is logged in will appear in this field. Select the drop-down arrow to select another agent/dispatcher. Keep the following in mind if the case will be reassigned:
   - A case must be assigned to a Dispatcher.
   - Only Dispatchers can be seen by other divisions.
   - Within divisions, Dispatchers must be used in order to preserve standard operational processes.

d. **Source** (Mandatory) – How did this case originate?
   - Phone
   - In-Person
   - Email
   - Other

e. **Status** (Mandatory) – These are the most commonly used options:
   - Received - Default status.
   - Assigned – To be used when a case has been assigned to an agent/dispatcher.
   - In Progress - An agent has started working on the case.
   - Pending – Waiting on vendor, client, etc.
   - Closed - Request/work has been completed.

f. **Contact Person** (Optional)
   - The contact field is used to identify the name of the person that is coordinating the case.
   - This field is used if the request is being made on behalf of another client.
   - If information is entered in this field, the **Agent** must contact the person identified if there are questions or additional info needed. Note: The email notification will be sent to the Client, not the Contact person.

g. **Priority** (Mandatory) - Use this field to specify the priority of the case. (How quickly does it need to be resolved?)
   - Critical
   - High
   - Medium
   - Low

   **NOTE:** Cases that are labeled “High” need to be addressed as soon as possible.

h. **Impact** - (Mandatory) - This drop-down field is used to categorize the amount of impact that this problem or issue has on the end-user who has reported the problem. If the end-user specifies this when creating their case, the information will appear in this field.

   **Impact**  **Description**

   - High       No workaround, unable to do work
   - Medium     Temporary workaround, can do work but the case is an inconvenience
   - Low        Can do work, but the case is a minor inconvenience
i. **Product/Category** (Mandatory) Used for reporting purposes, this field defines a case.
   - Enter a partial value (if known), or leave blank.
   - Select the **Go** button to display the available categories.
   - Select the appropriate category. Continue to specify your choice in the menu options as needed.
   - Select the **Select Current Category** button to select the category.
   - Use **Category Keyword** search to quickly find the correct category.

   **NOTE:** The **Product Keyword** search will find products, but there are very few products defined at this time.

j. **Case Details** (Mandatory) – This is used to describe the problem.
   - Enter a description of the case. The description should include information about the problem or request and any additional information that may be needed to resolve the issue.
   - Use complete sentences. Do not use abbreviations or uncommon acronyms. Acronyms should be avoided if they are not widely recognized by the campus community.
   - This is a public field. The End-user also has the ability to see the case details.
   - There is no limit to the amount of text that may be entered into this field.

k. **Location Type** (Mandatory)
   - This is a drop-down menu and it is used to designate the location of the problem/request.
   - This is a key field used for reporting purposes.
   - The available location types are:
     - Classroom
     - Office/Building
     - Computer Lab
     - Off-Campus
   - Select the appropriate option to select it.

l. **Building and Room** (Optional)
   - The **Building** and **Room** fields are open text fields. Use the university standard building ID.
   - Enter the building and room information in the appropriate field.

m. **Requested Completion Date** (Optional) - If the user requests that the case be resolved by a certain date, use this field to specify the requested completion date.
   - There are two ways to specify a date:
     - Select the **Calendar** icon and select a date from there, OR...
     - Select the **Elapsed Time** icon and select a date.

n. **IP Address** (Optional)
   - This field can be used to identify the IP address of a computer.
   - The information must be entered in the following format:
     - IP audit format (999.999.999.999).

o. **Hardware Address** (Optional)
   - This field can be used to identify the MAC layer address.
   - The information must be entered in the following format:
MAC Layer Address Format (XX-XX-XX-XX-XX-XX).

**(p. DNS Name (Optional))**
- If the case is a networking issue, include the DNS (Domain Name System) name.

**(q. Attachment (Optional))**
- When a case is created, a maximum of four attachments are allowed. More can be added after the case has been created.
  - i. Select the **Browse** button to search for and to select your attachment(s).
  - ii. If you need to add more than four, complete the case and then go to **Edit**.
  - iii. Under the **Comment** field, there is additional functionality for adding attachments. Select the **Browse** button to search for and to select attachments.
  - iv. Each attachment must be less than 10MB.

**(r. Website (Optional))**
- If needed, enter a URL to a website.

**(s. Problem Code (Optional))**
- This is a drop-down menu and is used to designate the case type problem/request.
- The types of problem codes are:
  - i. Incident (Occurrence of a known problem)
  - ii. Info (Request for information)
  - iii. Problem (The cause of the problem is unknown)
  - iv. Service Request (Nothing is broken but someone is requesting a service)
  - v. Change Request (To submit a change request to a production system) (Within IT, this will result in a discussion item during the Change Management meetings)

6. To complete the case creation process:

   **a.** Select the **Create Case** button.

   **b.** The case is created and the case number is assigned automatically.
   **c.** A notification email is automatically sent to the client.
   **d.** The page will now display as the **Case Detail** page.

**NOTE:** You may also select the **Create & Complete** button if you would like to close the case immediately.
7. If the case is related to another case that deals with the same issue:
   
   a. After the case is created, select the **Edit** button.

   ![Edit Button](image1)

   b. Select the **Relate** Tab.

   ![Relate Tab](image2)

   c. Select **Type**.

   d. Select **Go**. Search for and relate the case as needed.

   e. Select the **Relate** button to complete the process.

   ![Relate Process](image3)
REVIEWING A CASE AS A DISPATCHER/AGENT

For IT – This is an IT business process; it is optional but recommended for those areas outside of IT.

AGENTS - **Cases must be reviewed/acknowledged within one business day** of the case creation date. Email the client from within the EBsuite case that you have received the case and explain how you are handling the case. Provide the clients with an estimated time of completion, and tell them what to expect. **Agents should monitor their cases regularly throughout the business day.**

Dispatchers – Should **monitor and assign their cases regularly throughout the business day** (at least two times in the morning and a couple times in the afternoon).

To view your cases:

1. Log in to EBsuite.
2. Go to **Case > Summary**.
3. Depending on your role, the **Cases Summary** page displays all the cases that are assigned to you as an agent or as the dispatcher.
4. Customize the view by selecting on the **Assigned To** drop-down and making the appropriate selection (i.e. Me, All Users, Dispatchers, etc.)

5. Select the case that you would like to review.
6. The **Case Detail** view appears. Use the right scroll bar to move down to the **Processing Log** area.
7. Select the **Edit** button.

8. In the **Case Detail** view, make any required changes, updates or follow-up with the case or client. Changes **Product/Category, Priority, Status, and Assigned To**, should be reviewed and changed if appropriate.
9. **In the Action Type:** area:
   
   e. Change the **Action Type** field to:
      * **Process Case** to input case information and updates, or
      * **Email Contact** to email case contact.
10. When emailing a contact:
   
   a. Emailing the client (via EBSuite) to obtain additional information. If the email is sent via EBSuite it will automatically be added to the processing log.
   b. Email the client to let them know that you are working on the case. The following information should be included:
      - Explain how you are handling the case. What to expect next, etc.
      - Give the end-user an estimate of how long the request will take to complete.
      - Let the end-user know that their case can be tracked in EBSuite.
   c. More than one person can be addressed in the “to” field by using a comma (,) as a separator. Be sure to use the full email address.

   **NOTE:** Use complete sentences and no technical acronyms.

11. Select the Update button to update the case if changes were made.
12. Use the right scroll bar to move down to the Process Log area to review the case log detail.

**ASSIGNING A CASE TO ANOTHER DISPATCHER/AGENT**

When assigning or reassigning a case *outside of your group*:

- A case should only be assigned to a dispatcher.
- The case should be reassigned if the work required to complete the case must be performed by another group.

When assigning or reassigning a case *within your group*:

- A case can be assigned to anyone within your group.

**To assign or reassign a case:**

1. Login to EBSuite.
2. The Customer Support page displays.
3. Go to Case > Summary.
4. Select the case that you will be working with.
5. Select the Edit button.
6. Update the processing log to reflect why the case is being assigned to a different dispatcher. This information will be available to the end-user when they view the case in EBSuite.
7. Email the client via EBSuite if appropriate to let them know that the case has been assigned to a different area.
8. Select a dispatcher from the Assigned To drop-down.
9. Select the Update button to update the case.
# EDITING A CASE

A case can be edited at any time throughout the workflow process by an agent, user or dispatcher. Edits include additional information about the case, case reassignments, conversations with the client, or others regarding the case, emails, updates, etc.

**To edit a case:**

1. Login to EBSuite.
2. The **Customer Support** page displays.
3. Go to **Case > Summary**.
4. Select the case that you will be editing.
5. Select the **Edit** button.
6. Edit fields as needed. This may include the following:
   a. Updating client info.
   b. Adding additional comments.
   c. Assigning the case to a different dispatcher.
   d. Changing the Product/Category.

7. Select the **Update** button to update case.

**Note:** The **Log File** keeps tracks of all updates. Log entries are created automatically when comments have been added or if changes have been made to the case. The **Log File** is public information but if there is confidential information contained in the **Log File**, the entry can be edited for content.

# CLOSING A CASE

Cases are to be closed upon completion of the work requested by the agent.

**To close a case:**

1. Log in to EBSuite.
2. The **Customer Support** page displays.
3. Go to **Case > Summary**.
4. Select the case you will be closing.
5. Select the **Complete** button.
6. Complete the following fields (see figure below).

   a. **Status** should be Closed (Mandatory).
   b. **Resolution Code** (Mandatory) – select appropriate code from the drop-down menu.
   c. **Resolution Detail** (Mandatory).
d. **Problem Code /Type** (Mandatory) - select appropriate code from the drop-down menu to designate the case type problem/request. If this is already filled, confirm that the selection is accurate.
   - Select any of the following codes:
     i. Incident (Occurrence of a known problem)
     ii. Info (Request for information)
     iii. Problem (The cause of the problem is unknown.)
     iv. Service Request (Nothing is broken but someone is requesting work or service to be performed)
     v. Change Request (To submit a change request to a production system) (Within IT this will result in a discussion item at the Change Management meetings)

e. **Send Email** should be selected.

f. **Record to Process Log** should be selected.

7. Select the **Complete Case** button.
   - The user will receive an automatically generated email notifying them that the case has been closed.
   - If the user responds to the email, the agent will receive an email.
   - The agent must view case and evaluate the response and access if further action is necessary.
SWITCHING ROLES

Some users in EBSuite will have more than one role. For example, some users may have the Agent role, as well as the Dispatcher or Admin role. Your access will vary depending on your role.

To switch roles:

1. From the Customer Support page, go to Account > Preferences.

2. In the Personal Info section, select the Switch Roles drop-down and select the appropriate role.

3. Scroll down and select the button to save the changes.

USING REPORTS

There may be a variety of different ways to create reports and views. Some of the report options may be limited due to role and group restrictions.

Using Custom Views/Reports

A Custom Report uses the same definition as a Custom View, which is a pre-defined, or user-defined List Definition. It specifies exactly what data and fields you would like to include. Select the Create New Report button to create a new Report, or select the link of an existing Report to see/update the definition of that Report. To view the result of a report, or get a CSV format file export, please select the View Report link of a selected report.

This type of report is a variation/extension of the on-screen Custom Views (i.e. the table views you see in the Case summary page). It is basically a table view of your case data.

What do you get?

A Table/CSV/RSS dump of cases.
What do you Configure?

You will need to configure the **rows** (i.e. which cases to include in the output), by the from a standard search, and the **columns** (i.e. which fields to display for a given Case).

Why use this type of report?

You should use this report if:

- You need a copy of your data for backup/archiving purposes
- You need to export your data in CSV format
- You need to run a special report in Excel, or some other third party reporting tool
- You need to display certain criteria of cases (for example Cases assigned to you) as a RSS feed in iGoogle, My Yahoo, Outlook, etc.
- You need a simple print report of select cases

To run this report:

1. From the Customer Support Page, go to **Case > Reports**.
2. Scroll down to the **Custom Views/Reports** section.
3. Select the **View Report** for the report you would like to view/print.
4. The report displays.
5. Select the Print button to print the report or the **Export CSV file** button to open the report in Excel.
6. Use your browser’s back button to return to the Custom **Views/Reports** page.
Using Predefined Reports

EBSuite offers a set of predefined reports, each focusing on a specific aspect of your cases. For example, one report may focus on case status distribution, while another one looks at assignees, and more.

What do you get?

A variety of different reports, each focusing on a different aspect of your cases.

What do you configure?

Depends on the report. See below for a detailed list of predefined reports.

Why use this type of report?

You should use this type of report if you would like to know any of the following:

- The Status/Priority/Assignee/Creator... distribution of your cases
- How the Status of cases is changing (Where are the cases going?)
- Who is spending how long to resolve the cases
- Cases by organization, product, or by product categories
- Case notes
- Time submitted

To run this report:

1. From the Customer Support Page, Go to Case > Reports.
2. Scroll down to the Predefined Reports section.
3. Select the Predefined Report and fill in the appropriate criteria.

The following are samples of predefined reports:

Standard Case Report by Status

- A Chart and Table view of case distribution by status.
- You can select a time period and filter on the selected cases.
- Report displays the number of cases by Status, as well as by the detailed list.
- CSV export is available.
Standard Case Report by Priority

- A Chart and Table view of case distribution by priority.
- You can select a time period and filter on the selected cases.
- Report displays the number of cases by Priority, as well as by the detailed list.
- CSV export is available.

Case Report by Week

- A week-by-week summary of Case activities.
- You can easily navigate between weeks. You can also view a summary by types of activities for example, by Case Created, Closed, Touched, Number of Logs, Agents and by Clients.
- You can drill down to see the details of the activities.

Using Report Builder

With Report Builder, you can specify the search result from a Published Query Builder query or a Saved Search as the data source, and an output format of your choice as presentation, to generate a report. You can specify multiple sort columns, report across entities, and freeze & publish the report result.

Report Builder is the most advanced type of report among the three. Here you can choose a Saved Search result, or a Query Builder result as the data source, and your choice of Output Format. You can also schedule automatic scheduled reports based on Report Builder.

What do you get?

Depending on your choice for output format, the report can be a table, chart or both.

What do you configure?

Data Source: All Cases, a Saved Search result, or a Query Builder result.

Output Format: Different report output styles.

Why use this type of report?

Report Builder is the only type of report that gives you the ability to:

- Use a Query Builder result as the data source.
- Start with an Organization/Contact query result and report on THEIR cases.
- Save the definition of your report builder and run periodically or automatically scheduled reports.
- Have the report output be automatically sent to colleagues and clients.
- Encapsulate the report results on Dashboard Widgets to display them on your dashboard.

TRAINING AND SUPPORT

IT Training

Contact Us:
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