Case Management

Case Management gives the User access to the Case handling functionality. A User can create and capture Case details and conduct a variety of operations to allocate and track the case to resolution.
When a User selects Case Management menu button, they are presented with 2 tables of Cases. The first lists Open Cases and the other, Closed Cases.
The User has 4 options when viewing Cases. They are:
- View My Cases for selected Account
- View all My Cases
- View all Cases for selected Account
- View all Cases
Note: If the User has not previously selected an Account to work with, the Accounts table is first presented for the User to select from.

1. View My Cases for a selected Account

The View Cases screen is displayed when the Case Management menu button is selected.

This is the default view.

The User is presented with 2 tables - Open and Closed Cases. These Cases represent entries where the User is the Case Owner for the current/selected Account.

2. View all My Cases

The User can select this option from the View Cases screen.

The User is presented with 2 tables - Open and Closed Cases. These Cases represent entries where the User is the Case Owner for all Accounts.

3. View all Cases for a selected Account

The User can select this option from the View Cases screen.

The User is presented with 2 tables - Open and Closed Cases. These Cases represent entries for the current/selected Account.

4. View all Cases (for all Accounts)

The User can select this option from the View Cases screen.

The User is presented with 2 tables - Open and Closed Cases. These Cases represent entries for all Accounts that the user has permissions to view.

5. View all Cases for a Customer

The User can view a summary of Cases via the View Customer screen: Cases tab - view all Cases associated with a Customer

Refer View a Customer section.

6. Search for a Case

There are 2 methods to search for a Case. The first is on the Banner Section using the Global Search function. Refer Global Search section.

The other method offers more fields and options to refine the search and can be accessed by selecting Case Management from the Menu Bar and select Search Case from the Left Menu Section.

The User can search for a Case or a list of Cases by filtering on the following criteria:

- Case Number
- Status
- Reason Code
- Description
- Resolution Code
- Logged Date
- Promised Date
- Resolution Date
- Closed Date
- Owner (who owns the Case)

> **Note:**
> These tables will only display Cases related to Accounts which the User has permissions to View.
> If access is needed for an Account that is not in this list, contact the application Administrator to change the Users privileges.

7. Create Case

When a Case is created it must be associated with a Customer.

If a Customer has not been selected, the User will be presented with the Search Customer screen. Once you have found the Customer you want to create a Case for select the Create Case link in the Operations column.

All required fields are in **bold**

Field	Description
Status	Case status
Reason Code.	Reason Case was created
Description	Short description of Case
Resolution Code	How the Case was resolved
Promised Date	The date the Case will be resolved that was communicated to Customer
Resolution Date	The date the Case was resolved
Closed Date	The date the Case was closed
Owner	Case Owner

Table 1:

Note:
Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

8. Add a Case Note

Notes can be used to store additional or background information. The User can create a Note by selecting the Add Note link in the Left Menu Section.

9. Delete a Case Note

This operation is only accessible from the View Case screen.

To perform this action:

- Select View Case function to access the tabs (below Case details)
- Select the Notes tab to access the operations View, Edit, and Delete
- Select Delete

10. View all Case Notes

The User can view a summary of Notes via the View Case screen: Notes tab - view all Notes associated with a Case

Refer View a Case section.

11. Add a Case Attachment

Attachment can be used to store large amounts of information. The User can create an Attachment by selecting the Add Attachment link in the Left Menu Section.

12. View a Case Attachment

This operation is only accessible from the View Case screen.

To perform this action:

- Select View Case function to access the tabs (below Case details).
- Select the Attachments tab to access the operations View, Edit, and Delete.
- Select View or the Created Date.

13. Edit a Case Attachment

This operation is only accessible from the View Case screen.

To perform this action:

- Select View Case function to access the tabs (below Case details).
- Select the Attachments tab to access the operations View, Edit, and Delete.
- Select Edit.

14. Delete a Case Attachment

This operation is only accessible from the View Case screen.

To perform this action:

- Select View Case function to access the tabs (below Case details).
- Select the Attachments tab to access the operations View, Edit, and Delete.
- Select Delete.

15. View Case

Case details can be displayed by selecting (clicking) Case No. link (where Case No. is underlined) on screens where this is displayed or from the View Cases tables (displayed when Case Management action is selected).

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

15.1. Follow Ups tab

Follow Ups tab - view all Case Follow Ups

Displays:

- Action required
- Date to action
- Status
- Priority
- Assignee (who created the Case)

15.2. Histories tab

History tab - view Case History

Displays:

- User that made the change
- Date and time change was made
- Field/Item that was changed
- Old value
- New value

15.3. Notes tab

Notes tab - view all Case Notes

Displays:

- Date Note was created
- Date Note was updated
- Short description
- View/Edit/Delete operations

15.4. Attachments tab

Attachments tab - view all Attachments for a Case

Displays:

- Date Attachment was created
- Date Attachment was updated
- Filename
- Short description
- View/Edit/Delete operations

16. Edit Case

This function is accessible from the Left Menu Section. It allows the User to change and update any Case detail.

> **Note:**
> Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

17. Delete Case

This function is accessible from the Left Menu Section. It allows the User to delete any Case.

> **Note:**
> Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

18. Create a Follow Up

A Follow Up is similar to a To Do but is related directly with a Case. Like a To Do a User can create it but assign it to another User to action.

> **Note:**
> This function is available in the Left Hand Menu when a User is viewing or editing a Case.

19. Edit/Update a Follow Up

Follow Up details can be edited or updated by selecting it from the Follow Up tab in the View Case screen.

20. Re-assigning a Follow Up

A Follow Up can be re-assigned to another User by selecting it from the Follow Up tab in the

View Case screen and updating the Assignee item.

21. Close a Follow Up

A Follow Up can be closed by selecting it from the Follow Up tab in the View Case screen and updating the Status indicator.

22. View all Case Follow Ups

The User can view a summary of Follow Ups via the View Case screen: Follow Ups tab - view all Case Follow Ups