



# MS Dynamics Student CRM Flinders University

# Advanced Find Filter and View Case Information

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The **Advanced Find** feature enables searching for CRM information based on certain criteria. This can also be referred to as a **Query**. These notes include some basic steps for creating a Query, saving it as a **Saved View**, sharing and removing the sharing between CRM Users or Team, saving the View as a Dashboard and sharing the Dashboard. The CRM Users or Teams may need to have the correct CRM permissions to view the information shared and can log an assystNET call as per the footer of this User Guide.

The steps involved are described concisely below and in more detail starting on Page 6.

- The currently viewed screen in CRM, for example a Case or Contact or Internal Comment, will be the selected option adjacent to **Look for:** when clicking on the Advanced Find icon.
- A Query can be created and not saved.
- A Query can be created and saved as a **Saved View**. Therefore this User Guide refers to the saved Query as a View or Saved View.
- The **Saved View** can be accessed from the Dashboard.
- All Saved Views are visible in the Dashboard as well as Advanced Find.
- Saved Views are grouped under System Views which are created by the CRM Team and My Views which are created by the Users. This is in Advanced Find and the Dashboard.
- A Saved View created by a User can be shared with other CRM Users.
- An email with the link to the shared Saved View can be sent to other CRM Users.
- The CRM Users with the Shared View will see the View in Advanced Find.
- A Shared Dashboard will display the included Shared View.
- Correct CRM permissions may be needed to view certain Views.
- A **Query** and **Saved View** can be exported to Excel **IF** the User has appropriate permissions applied.

# Sign in to MS Dynamics Student CRM

Due to Microsoft changes, from 30th October, 2020 Flinders University will be using a Unified User Interface when working in MS Dynamics CRM. The Dynamics 365 - custom will no longer be available.

1. Locate Okta (flinders.okta.com) and click on MS Dynamic CRM as circled below.



- 2. Sign into MS Dynamics Student CRM. Signing in for the first time will present the following screen.
  - Type either your user name or FAN: <u>firstname.lastname@flinders.edu.au</u> OR <u>fan@flinders.edu.au</u>.
  - Click **Next** to sign in. The prompt '**taking you to your Organisation's page**' is displayed.
  - Thereafter, when signing in the FAN will be displayed and click **Next** to sign in.



3. Flinders CRM | Student CRM, Service Agent Dashboard is now displayed.



# Sign Out of MS Dynamics Student CRM

After completing your work, it is a good idea to sign out of MS Dynamics Student CRM and also close the browser.

- 1. Click your initials in the Navigation Pane, top right hand corner.
- 2. Click on **Sign out**.



3. The prompt 'You've signed out of your account' is displayed. Close the browser.

## Create a new View

The example below is to look for all Cases which have Student Administration Services as the **Initial Queue**. It also includes instructions on how to **search** for this Queue, **Save** the Query as a **Saved View** and **Share** the Saved View with CRM Users.

- 1. Click on the Mathematical Advanced Find icon, located on the right hand side of the Navigation menu. The Advanced Find window is displayed which can be maximised.
- 2. Click the New icon in the ADVANCED FIND ribbon to remove any current settings.
- 3. Click adjacent to **Look for:** on the left hand side of the screen and select appropriately from the drop down menu, for example **Cases**.

Advanced Find - Microsoft Dynamics 365 - Google Chrome	2	- 0	×
https://flinders-uat.crm6.dynamics.com/main.asp	x?appid=0e4a9478-32a0-e811-a96a-000d3ae12cc3&pagetype=AdvancedF	ind#264824377	
FILE ADVANCED FIND	Microsoft   Dynamics 365	Wendy James 🕐 FLINDERS (UAT) 🚕	
Query Saved Results New Save Views Results New Save Fdit Columns Edit Properties			
Show View Look for: Cases Select	Query Debug  Use Saved View: [new]		T

4. Click on **Select** beneath **Look for:** and select the type of query from the drop down list, for example **Initial Queue**.

Advanced Find - Microsoft Dynamics 365 - Google Chrome	e	– 🗆 X
https://flinders-uat.crm6.dynamics.com/main.asp	ox?appid=0e4a9478-32a0-e811-a96a-000d3ae12cc3&pagetype=Ac	dvancedFind#264824377
FILE ADVANCED FIND	Microsoft   Dynamics 365	Wendy James 😵 FLINDERS (UAT) 🔈
Query Saved Results New Save Views Views Save As Views Views Vi		
Show View	Query Debug	
Look for: Cases	▼ Use Saved View: [new]	×

5. Click on **Equals** to the right of Initial Queue and select from the drop down list, if needed.

Equals	۲
Equals	
Does Not Equal	
Contains Data	
Does Not Contain Data	
Contains	
Does Not Contain	
Begins With	
Does Not Begin With	
Ends With	
Does Not End With	

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6. Rest the mouse adjacent to Enter Value Enter Value to display a search field and magnifying glass.

Click the magnifying glass to display the Look Up Records window. In this example a Team will be searched for and selected.



- 7. Search for and select the Team:
  - Type the name or part of the name of the Team in the Search field. •
  - Click the magnifying glass to the right of **Search**. A list is displayed. •
  - Rest the mouse on the name. •
  - Click the box to select the correct Team name.
  - Click **Select** in the bottom left hand corner of the window. •
  - The name appears beneath Selected records: •
  - Click on **Add** at the bottom of the window. •
  - The Look Up Records window is closed. •
  - The selected Tea

m is inserted in the Enter Va	l <b>ue</b> fie	ld. 🧹	
Look Up Records			×
Look for Team			
Look in Teams Lookup View			
Search student X			
Team Name	I		U
Student Administration Services			
Student Recruitment			
Student Systems			
1 - 3 of 3 (1 selected)		Page 1	•
Selected records:			
Select			
Remove			

8. Click on Results in the ADVANCED FIND ribbon. The ribbon LIST TOOLS, **CASES** is displayed together with the matching results.

#### Save the Query as a Saved View

9. Click on the **ADVANCED FIND** tab to display the ribbon.



10. Click on the **Save** icon in the **ADVANCED FIND** ribbon. The **Save as new View** window is displayed.

Save as new View The view is stored in the list of saved views.	×
Name *	
Description	
Save Car	icel

#### Name

11. Type an appropriate name to describe the Saved View.

#### Description

For future reference it is helpful to enter information in the Description field to explain how the Query and now Saved View was created, the values selected and why it was created.

- 12. Left mouse click on **Save** in the bottom right hand corner of the window.
- 13. Click the X to close the Advanced Find window.

# **Displaying all Saved Views**

1. Navigate to the Dashboard and click on the Marced Find icon, located on the right hand side of the Navigation menu. The Advanced Find window is displayed which can be maximised.



2. Click on the Saved Views icon. The LIST TOOLS, SAVED VIEWS tab and ribbon is displayed.

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- 3. The list of Active Saved Views is displayed. If need be, click the drop down arrow and select a different view.
- 4. Click a Saved View to select and view.

Ac	tive Saved Views 🗸
	System Views
	Active Saved Views
	Active Views Shared with Me
	Inactive Views Shared with Me
	My Active Saved Views
	My Inactive Saved Views
	Shared Inactive Views

5. If the Saved Views are not displayed, click on the Record Type icon, left hand side of the ribbon and select **All** from the drop down menu.

### Share a Saved View

Sharing a Saved View enables other CRM Users to use the View in their Dashboard. This ensures all Teams have access to the same Dashboard Views.

#### Add a User or Team

- 1. Continue from **Displaying all Saved Views** Steps 1 to 5, Page 8.
- Rest the mouse on the Saved View to be selected and click the square to the left of the name.
   The View is selected

The View is selected.

3. Click on Share in the ribbon. The Share saved view window is displayed.

4. Common Tasks – select Add User/Team.

Share saved view				;
Choose the users or team you	want to share the saved view with, and give them specific permissions.			
Common Tasks	Name Read Write Delete Append	Assign	Share	
👵 Add User/Team				
Remove Selected				
<ul> <li>Toggle All Permissions of the</li> </ul>				
Selected Items				
🛃 Reset				
	This record is not shared.			
		Share	Cano	el

5. The **Look Up Records** window is displayed. Complete the fields appropriately if searching for a User or Team.

Click adjacent to **Search**, type all or part of the name and click the magnifying glass. A list of names is displayed.

- 6. Rest the mouse on the name in the list and click the box to the left to select the name.
- 7. Click **Select** at the bottom left hand side of the window. The name is displayed under **Selected Records:** at the bottom of the **Look Up** records window.
- Click Add in the bottom of the window. The Share saved view window is displayed with the Users/Teams selected in the previous steps. Select the appropriate permissions displayed.

Common Tasks	Nan	ne	m	Read	Write	Delete	1	Append	1	Assian	Ľ	Share	
🔓 Add User/Team	S Dian	a Prince							P.				_
K Remove Selected	-												
Items													-
Permissions of the													
Selected Items													
Reset													

CRM How to Guide Advanced Find Filter and View Case Information.docx October, 2020 Version 6.0 Page 10 of 19 Need help with the CRM? **Use the Okta, Service One web form.** Find the appropriate form for a **Request** or **Incident** and complete the details. 9. Click **Share** in the bottom right hand corner of the window. The following screen is displayed for a short time. The **Advanced Find** window is now displayed.



#### Email a Link

An alert is not sent to the shared CRM Users and a link can be emailed to do so.

- 1. If the **Active Saved Views** is not displayed, refer to **Add a User or Team** on page 9, steps 1 to 5.
- 2. Rest the mouse on the Saved View to be selected and click the square to the left of the name.

The View is selected.

3. Click the <sup>Email a Link</sup> **Email a Link** icon. A new Outlook Email is created with the name of the View and the link in the body of the Email. Complete and send the email to the Shared User.

#### Remove a Shared User or Team

- 1. If the **Active Saved Views** is not displayed, refer to **Add a User or Team** on page 9, steps 1 to 5.
- 2. Rest the mouse on the Saved View to be selected and click the square to the left of the name.

The View is selected.

- 3. Click on Share in the ribbon. The **Share saved view** window is displayed.
- 4. Click adjacent to the User/Team to be removed.

5. Common Tasks - click Remove Selected Items



6. Click **Share** in the bottom right hand corner of the window. The following screen is displayed for a short time. The **Advanced Find** window is now displayed.



7. Close the **Advanced Find** window.

#### Service Agent Dashboard – Use the Saved View

- 1. Click on **Home** or **Dashboards** in the Navigation Pane to display the **Service Agent Dashboard**.
- 2. Click on the drop down arrow adjacent to any of the Dashboard views, for example **My Team's Active Cases**.
- 3. Locate My Views at the top of the list.

4. The name of your **Saved View** and any shared with you are displayed in the list. Click on the name. The Saved View is displayed.

C		
$\leftarrow$	${\it I} \!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!$	
S	Gervice Agent Dashboard ∨ My Team's Active Cases ∨	
	My Views	*

# Create and Share a New Dashboard

After completing the steps to Create a View in Advanced Find and share the View with another CRM User it is possible to **share a new Dashboard** with another CRM User as well.

#### CRM Create a new view

Refer to Create a new View on Page 6.

#### Share the view

Refer to Share a Saved View on Page 9

#### Create a New Dashboard

- 1. Navigate to the Service Agent Dashboard.
- 2. Click on  $+ New \vee$  New in the Menu Bar.
- 3. Click on Dynamics 365 Dashboard from the drop down menu.



4. The **Choose Layout** window is displayed. Click on the **2-Column Regular Dashboard**. This will be changed to 1 column only by increasing the column width and height, Page 15.

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5. Click on **Create** in the bottom right hand corner of the window. The PowerApps window is displayed.

Choose a layout to cre	ate a dashboard.		×
3-Column Regular Dashbo 2-Column Regular Dashbo	3-Column Multi-Focused 3-Column Dverview Dashb	4-Column Overview Dashb 3-Column Focused Dashb	A Column Regular Dashboard This layout can accommodate components across two columns.
			Create

6. Click on the 📃 Insert List icon, as circled below.

P SAVE		PROPERTIES	🛱 EDIT COMPONENT	CHART	≣ LIST	WEB RESOURCE		
me: *							 	
ection	(					. <b>I</b> ⊈ ≣ § ⊡ ⊕ ि		

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- 7. The **Add Component** window is displayed.
  - **Record type**: Click the drop down arrow and select the appropriate Record type, for example **Cases**.
  - View: Click the drop down arrow, scroll down to **My Views** and select the **Saved View** previously created and shared with the same CRM Users that this Dashboard will be shared.
- 8. Add: Click Add in the bottom right hand corner of the window. The **PowerApps** window is still displayed.

Add Component			×
Choose the component that you	want to add to the	e dashboard.	
Record Type	Column	Column	Column C
Cases 🔻			
View			
Cases Initial Queue Studen 🔻			
· · · · · · · · · · · · · · · · · · ·			
		_	
		4	Add Cancel

#### Column Width and Height

The Column width and height may need to be increased, depending upon how many frames are in the Dashboard.

• Column width and Height of the Dashboard: click the elipses in the menu and click on + Increase Width Increase Width from drop down menu. This will need to be repeated to cover the width of the Dashboard. Increasing the height allows approximately 4 extra rows of information displayed each time this Increase Height icon is clicked.

••••
©≡ ⊚≓ Timeline
🗆 Iframe
ற Power BI Tile
Prelationship Assistant
↔ Increase Width
→ ← Decrease Width
Increase Height
♯ Decrease Height

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#### Name and Save

- 9. Click adjacent to **Name:** \* and type the appropriate name for the Dashboard.
- BAVE **SAVE** in the top left hand corner of the PowerApps window. 10. Click
- 11. Click CLOSE **Close** in the top left hand corner of the PowerApps window.



12. The new Dashboard is displayed.

🖄 Share Dashboard

#### Share the new Dashboard

1. Click on

Share Dashboard in the Dashboard menu. The Share user dashboard window is displayed.

1. Select Add User/Team.

Share user dashboard ×										×		
Choose the users or team you want to share the user dashboard with, and give them specific permissions.												
Common Tasks Add User/Team Remove Selected <u>Items</u> Toggle All Permissions of the Selected Items Reset		Name		Read		Write This rec	Dele	te	Append	 Assign	Share	
										Share	Cance	el

2. The Look Up Records window is displayed. Complete the fields appropriately if searching for a User or Team. Click adjacent to Search, type all or part of the name and click the magnifying glass. A list of names is displayed.

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- 3. Rest the mouse on the name in the list and click the box to the left to select the name.
- 4. Click **Select** at the bottom left hand side of the window. The name is displayed under **Selected Records:** at the bottom of the **Look Up** records window.
- 5. Click **Add** in the bottom of the window. The **Share user** dashboard window is displayed with the Users/Teams selected in the previous steps. Select the appropriate permissions displayed.

hare user dash	boar	rd												
bose the users or team y	ou wan	t to share the u	iser dashb	oard wi	th, and g	ive th	nem spec	ific p	ermissio	ns.				
ommon Tasks		Name	Read	i l	Write		Delete	÷	Append	1	Assign	1	Share	
Add User/Team		8 Diana Prince	2											
Toggle All Permissions of the Selected Items     Reset														
										ſ	Share		Cance	el

6. Click **Share** in the bottom right hand corner of the window. The following screen is displayed for a short time. The **Advanced Find** window is now displayed.



#### Advise the Shared CRM User

Create and send an email from Outlook to the CRM User to advise the Dashboard has been shared with them.

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#### View the New Dashboard

Any new Dashboard is viewed in the Dashboard list, under **My Dashboards**.

- 1. Navigate to the Service Agent Dashboard.
- 2. Click the drop down arrow adjacent to Service Agent Dashboard.
- 3. Scroll to the end of the list to locate the sub-heading **My Dashboards**. Any Dashboards created by you or shared by another CRM User are displayed under this sub-heading



4. Click on the new Dashboard and it will now be displayed.



#### Navigate to Service Agent Dashboard

- Click on Home or Dashboards in the Navigation Pane.
- Click on the drop down arrow adjacent to the currently displayed Dashboard, locate and click on the Service Agent Dashboard.

# Version Control

Version Number	Version Date	Changes						
1.0	July, 2019	Original Notes.						
2.0	July, 2019	Added <b>Create and Share a New Dashboard</b> on Page 13.						
2.0	July, 2019	Uploaded to FLO.						
3.0	October, 2019	Updated for October Upgrade. No changes made. Uploaded to FLO.						
4.0	April, 2020	Updated for the April Upgrade. Only pictures changed.						
5.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.						
6.0	October, 2020	Updated for the Unified User Interface. Uploaded to FLO.						