MS Dynamics Student CRM
Flinders University

Case Audit History
Filter and View

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Version 6.0

Contents

The **Audit History** of a Case displays some of the actions which have been taken on the Case. Some of these are explained starting on Page 6, **Filter the Audit History Fields**. Filtering can be used to only view a particular field. The data included in the Audit History view is as follows:

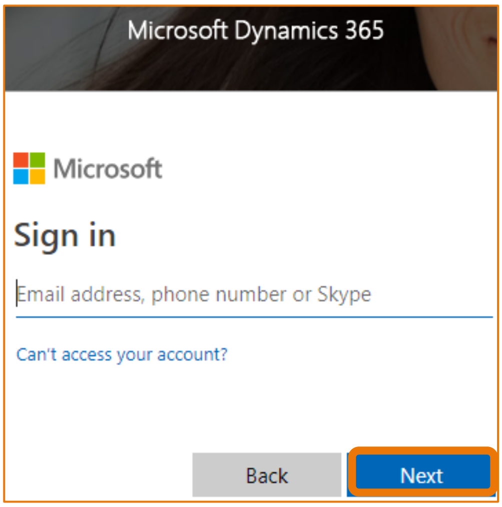
- **Change Date** – the date the change was made.
- **Changed By** – Staff member who made the change. If the Case is owned by a Team, **System** is listed.
- **Event** – reflects the nature of the process applied.
- **Changed Field** – the field which has been changed.
- **Old Value** – original information.
- **New Value** – the changed information.

Sign in to MS Dynamics Student CRM

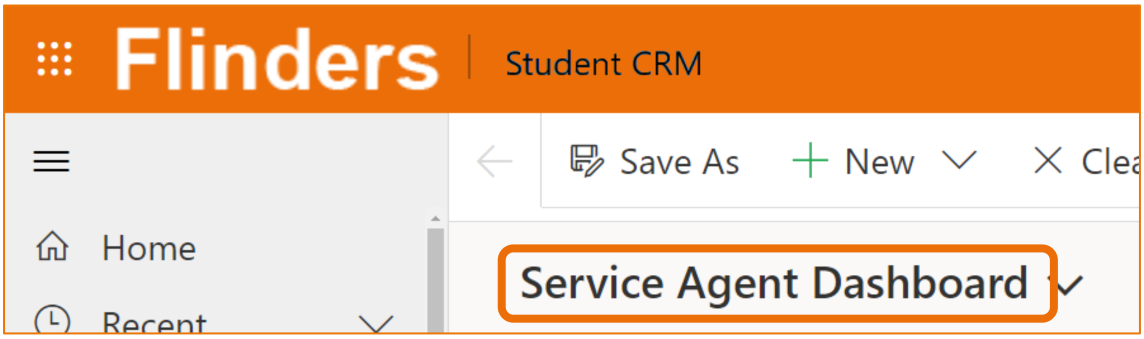
Due to Microsoft changes, from 30th October, 2020 Flinders University will be using a Unified User Interface when working in MS Dynamics CRM. The Dynamics 365 - custom will no longer be available.

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: firstname.lastname@flinders.edu.au OR fan@flinders.edu.au.
   - 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.

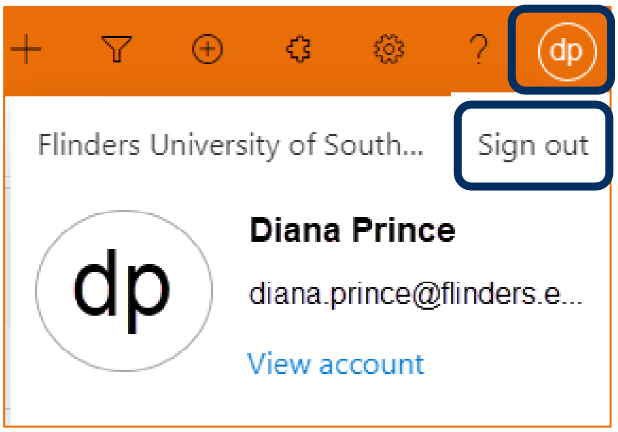


Sign Out of MS Dynamics Student CRM

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**.

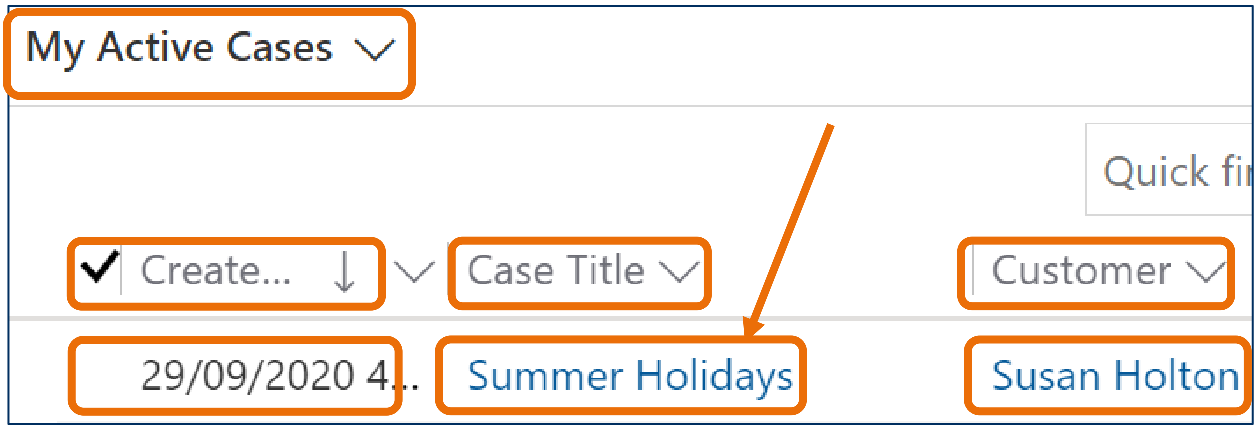


3. The prompt '**You've signed out of your account**' is displayed. Close the browser.

Locate and select the Case to be viewed

1. Ensure the correct view is displayed, for example **My Active Cases** or **My Team's Active Cases**.
   - **Created on** – the Date and time of the Case Creation is displayed.
   - **Case Title** – lists the names of the Cases.
   - **Customer** – Student's name.

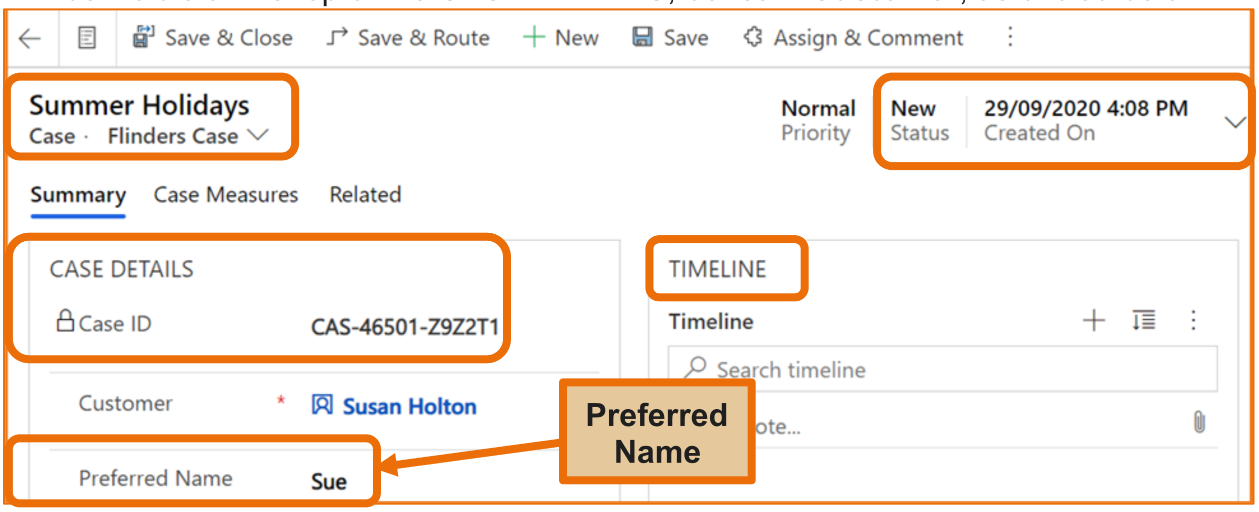
2. Click on the name of the **Case Title** to open the Case.



3. The Case is displayed.
   - **CASE Title** – is displayed in the top left hand corner of the Case screen.
   - **CASE DETAILS** – includes the Case ID which is automatically created when the Case is saved.
   - **TIMELINE** – displays all Activities.

Preferred Name, Case Record

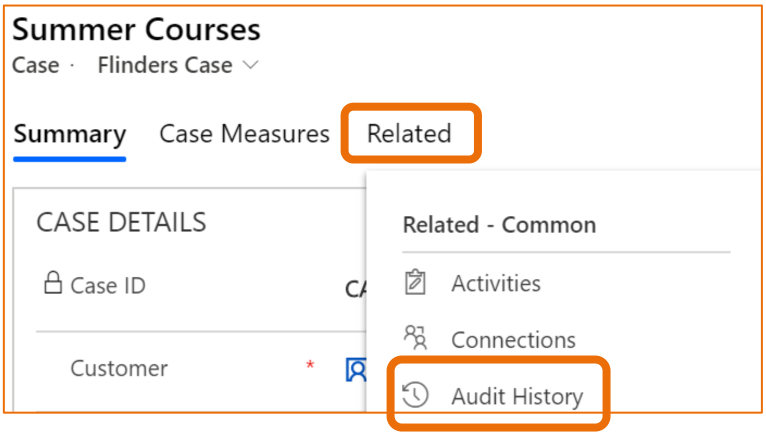
4. If the Student has updated their details in Student Two and added a **Preferred Name**, it will be visible at the top of the CASE DETAILS, beneath **Customer**, as circled below.



Locate Audit History

1. Click **Related** on the left hand side of the screen, beneath the Case name. A menu drops down.

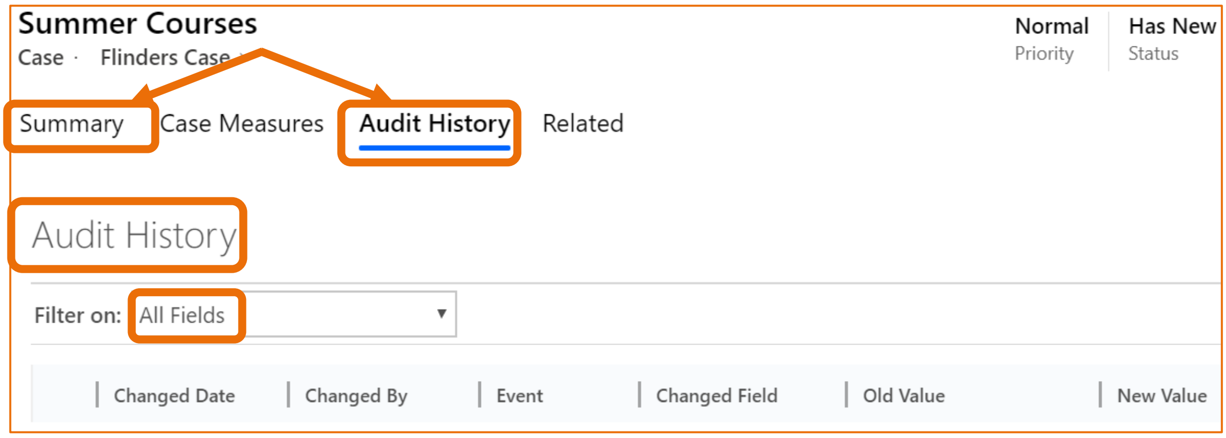
2. Click on **Audit History**.



3. **Audit History** is displayed in the list, together with the **Audit History**, **All Fields**. **Audit History** will remain visible until navigating away from the Case or clicking on Summary.

Case, Summary

4. Click on **Summary** to return to the Case Details and Timeline.



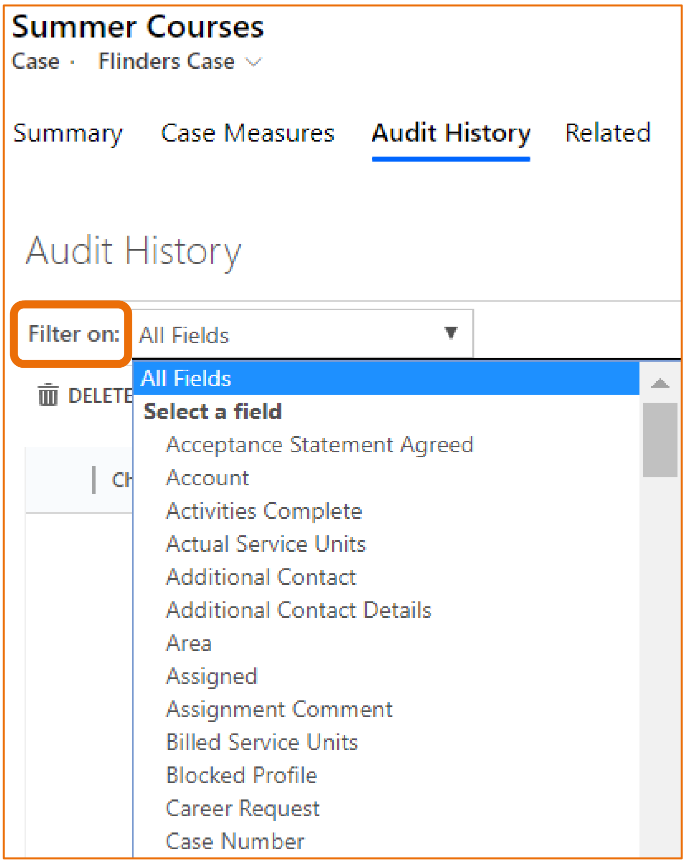
Filter the Audit History Fields

1. Click on the drop down arrow adjacent to **Filter on:**. **All Fields** which is displayed by default.

2. Select a Field by scrolling down and clicking or typing the first few letters of the Field name and pressing the Enter key. Some useful Field names are described, starting on Page 6, Filter the Audit History Fields.

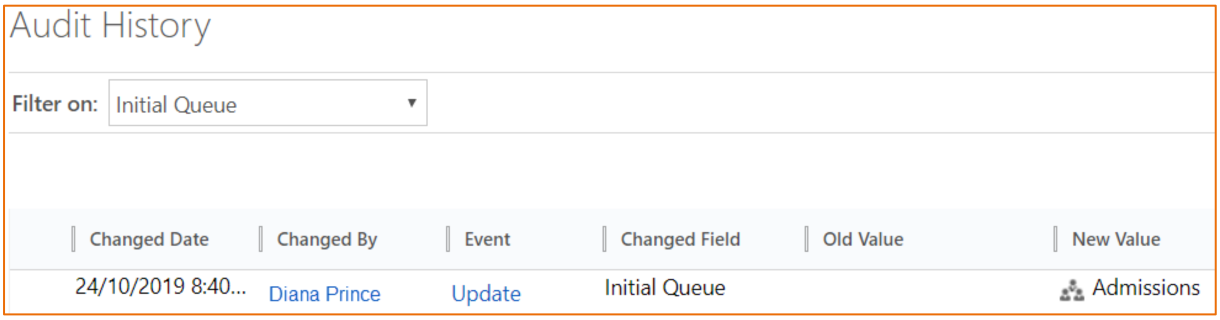
All Fields

3. To display all of the Fields after filtering, click on the drop down arrow adjacent to **Filter on:** and click on **All Fields** the top of the list.



Initial Queue

Displays the initial Team/Queue assigned to the Case.



Latest Queue

Displays all the Teams/Queues to which the Case has been assigned. This is regardless of how the Team/Queue was assigned: Using the Assign & Comment or Assign icons or clicking adjacent to Owner in the Case Details

Audit History

Filter on: Latest Queue

Changed Date	Changed By	Event	Changed Field	Old Value	New Value
28/10/2019 4:01...	SYSTEM	Update	Latest Queue	Flinders Connect	Admissions
28/10/2019 4:00...	SYSTEM	Update	Latest Queue	Admissions	Flinders Connect
24/10/2019 8:40...	Diana Prince	Update	Latest Queue		Admissions

Origin

Displays the origin of the Case, for example Web or what was selected by the Staff member when creating the Case.

Audit History

Filter on: Origin

Changed Date	Changed By	Event	Changed Field	Old Value	New Value
23/10/2019 12:2...	Diana Prince	Update	Origin	Face To Face	Face To Face
23/10/2019 12:2...	Diana Prince	Create	Origin		Face To Face

Owner

Displays the change of Ownership between Users and/or Teams. This is regardless of using the Assign & Comment or Assign icons or clicking adjacent to Owner in the Case Details.

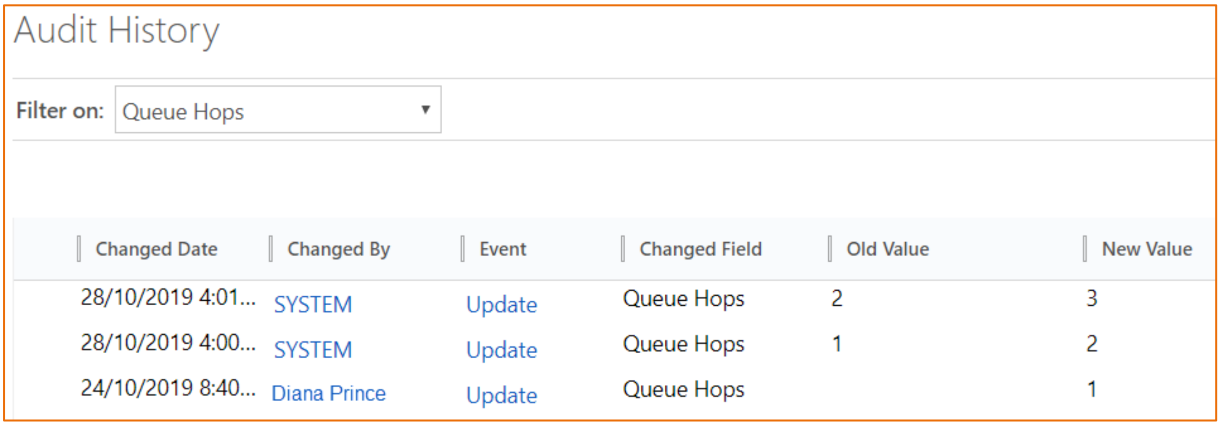
Audit History

Filter on: Owner

Changed Date	Changed By	Event	Changed Field	Old Value	New Value
28/10/2019 4:01...	Diana Prince	Assign	Owner	Flinders Connect	Admissions
28/10/2019 4:00...	Diana Prince	Assign	Owner	Admissions	Flinders Connect
24/10/2019 8:40...	Diana Prince	Update	Owner	Diana Prince	Admissions
23/10/2019 12:2...	Diana Prince	Update	Owner	Diana Prince	Diana Prince
23/10/2019 12:2...	Diana Prince	Create	Owner		Diana Prince

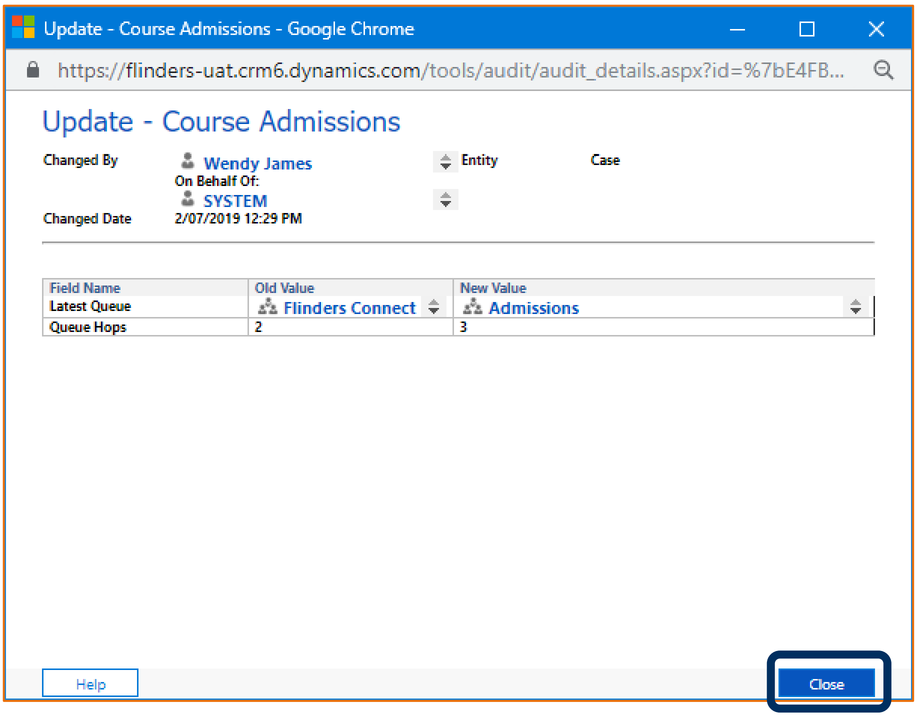
Queue Hops

The design behind this feature is to count how many times a Case is assigned to different Teams/Queues before landing in the appropriate one. It is mainly used to highlight Cases which are not so straight forward, for example, Flinders Connect answers some element of the enquiry, then it is assigned to a College for further information and is then assigned to Finance. This example is due to the complexity of the question asked.



Number of Queue Hops

The number of times the Case has been assigned to a Team/Queue. Clicking on Update in the Event column will display the Old Value and New Value. Click **Close** in the bottom right hand corner to close this window.



Resolved

Displays the date and time the Case was Resolved BUT does not display if the Case has been Reactivated. This is located under Status.

Audit History

Filter on: Resolved

Changed Date	Changed By	Event	Changed Field	Old Value	New Value
23/10/2019 12:2...	Diana Prince	Update	Resolved	No	No
23/10/2019 12:2...	Diana Prince	Create	Resolved		No

Status

Displays the history of all Case Status.

Audit History

Filter on: Status

Changed Date	Changed By	Event	Changed Field	Old Value	New Value
23/10/2019 12:2...	Diana Prince	Update	Status	Active	Active
23/10/2019 12:2...	Diana Prince	Create	Status		Active

Status Reason

Displays the history of the Case Status Reasons.

Audit History

Filter on: Status Reason

Changed Date	Changed By	Event	Changed Field	Old Value	New Value
29/10/2019 11:5...	Diana Prince	Update	Status Reason	Assigned	Awaiting Information/A...
29/10/2019 11:5...	Diana Prince	Update	Status Reason	New	Assigned
23/10/2019 12:2...	Diana Prince	Update	Status Reason	New	New
23/10/2019 12:2...	Diana Prince	Create	Status Reason		New

Version Control

Version Number	Version Date	Changes
1.0	July, 2019	Original Notes.
1.0	July, 2019	Uploaded to FLO.
2.0	July, 2019	Moved the description of Audit History Filter and View to the beginning to the document.
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. Uploaded to FLO.
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.