

MS Dynamics Student CRM

Flinders University

Glossary

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Version 4.0

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Introduction

This document includes a Glossary of Flinders University and MS Dynamics Student CRM terms. Please note more information will be added to this document and if you have any suggestions please email them to me: wendy.james@flinders.edu.au

Glossary

Term	Definition
Ask Trim	The former student web interface to submit and view online enquiries. This environment was replaced by Ask Flinders in 2015.
Case	A case is a student enquiry which has been recorded in Flinders CRM.
Case ID	The Case ID is the unique identifier of all Flinders CRM cases, and looks something like CAS-295943-L6F4D9. Like snowflakes, no two Case IDs are identical, and they are the primary way that students and staff can search for and track any individual enquiry in the CRM.
Contact	This is the person, ie a student, future student, staff member, external client.
FAQ	Frequently Asked Questions, which are accessible via the Ask Flinders Knowledge Base.
Flinders Connect	Flinders Connect (part of the Student Administration Services portfolio) are the primary front-line services team for current student enquiries across the University, and by virtue of this are the heaviest users of Flinders CRM. You can find out more about Flinders Connect here.
Knowledge Articles	Information linked to a CRM Case subject. Assists in answering queries.
KB Knowledge Base	KB is the collection of Knowledge Articles (Information linked to a Parature KB). Assists in answering queries.
Okta	Okta is the Flinders authentication dashboard that will let you log in to Flinders CRM. If you can't see a link to 'Dynamics CRM' on your Okta dashboard then speak to your line manager to request access.

Term	Definition
Owner	Every case in Dynamics CRM has an owner, which can either be a queue or an individual. Typically, a case remains owned by a queue until an individual is ready to start working on the case, at which time they transfer ownership of the case from the queue to themselves.
Parature	Parature was the Microsoft technology platform behind the former Ask Trim service. Parature has now been replaced by Ask Flinders.
Queue	A queue in Dynamics CRM is similar to a queue in real life - it is a place where cases wait to be served by a particular team. All College SAS teams have a queue which hold cases until staff are ready to work on them, and there are a range of whole-of-University queues covering themes such as enrolment, admissions, fees and ID cards.
Resolve	Status changed to Resolve means the Case has been completed. Same definition as Solve.
Routing rules	Routing rules are a series of checks for Flinders CRM cases which arrive via redirected emails, and which attempt to decide which queue is the right one for the enquiry, and then to route the enquiry directly to that queue. These routing rules typically work by looking for keywords in the incoming enquiry and using these keywords to decide where to send the case. Whilst not always correct, these rules cut down on the number of cases that need to be manually triaged from the Stray queue.
SAS	Student Administration Services (SAS) are the area within the University who are responsible for managing student administration enquiries, which make up the majority of enquiries which populate Flinders CRM (alongside prospective student enquiries - domestic and international - and Library enquiries). The Director, Student Administration Services is the formal business owner of Flinders CRM.
Solve	Status changed to Solve means the Case has been completed. Same definition as Resolve.

Term	Definition
Status	Each case has a status which flags whether work needs to be done on it for the student. The most typical case statuses include New, Open and Resolved.
Stray Queue	A 'catch all bucket' where Student emails are received which do not have a clear routing rule. For example 'hi how it going I need help' is automatically routed to the Stray queue and then Flinders Connect manually reviews the Case and assigns to the appropriate area.

Version Control

Version Number	Version Date	Changes
1.0	November 2018	Original Notes.
2.0	February, 2019	Updated the Glossary and uploaded to FLO.
3.0	July, 2020	Footer updated as AssystNET has been replaced by Service One. Uploaded to FLO.
4.0	October, 2020	Updated for Unified User Interface. Uploaded to FLO.