Contents

1 Navigation and Tiles ........................................................................................................................................... 4
  1.1 Using Case Management .......................................................................................................................... 4
  1.2 Setting your Home Screen ........................................................................................................................ 5
    Records Per Page ......................................................................................................................................... 6
  Hints and Tips ..................................................................................................................................................... 7

2 Cases .................................................................................................................................................................. 8
  2.1 Create a Case ............................................................................................................................................... 8
    2.1.1 Quick Create Case .............................................................................................................................. 9
  2.2 Work on a Case ......................................................................................................................................... 10
    2.2.1 Activities .......................................................................................................................................... 11
  2.3 Linking Cases .......................................................................................................................................... 12
  2.4 Reassigning a Case ................................................................................................................................. 13
  2.5 Sharing Cases ........................................................................................................................................ 14
  2.6 Resolve a Case ......................................................................................................................................... 15
  2.7 Cancel a Case .......................................................................................................................................... 17

3 Cases with Documents .................................................................................................................................... 18
  3.1 Enabling Save to SharePoint Functionality ............................................................................................... 20
  3.2 Locking Documents ................................................................................................................................ 23
  3.3 Sharing with Users from Other Teams ..................................................................................................... 27

4 Contacts and Accounts .................................................................................................................................... 31
  4.1 Create an Account .................................................................................................................................... 32
  4.2 Create Non-Oxford Contact ..................................................................................................................... 33
    4.2.1 Sharing Contacts / Accounts .......................................................................................................... 35

5 Creating Views, Charts and Dashboards ........................................................................................................ 37
  5.1 Share a View with a Team ......................................................................................................................... 45
  5.2 Create a Chart .......................................................................................................................................... 49
  5.3 Creating Dashboards ............................................................................................................................... 54

6 Email Templates .............................................................................................................................................. 58

7 Reports ............................................................................................................................................................... 62
  7.1 Creating Reports using the Report Wizard ................................................................................................. 62
  7.2 Running Reports ....................................................................................................................................... 68

8 Case Super User ............................................................................................................................................... 70
# Navigation and Tiles

## 1.1 Using Case Management

### The Left-hand Side

<table>
<thead>
<tr>
<th><img src="Image" alt="Microsoft Dynamics CRM" /></th>
<th>Clicking on this button will activate a drop-down menu for Case Management, WorkPlace and Help</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="Image" alt="Home" /></td>
<td>The ‘Home’ button will instantly take the user to the Workplace screen (usually a dashboard, but this can be changed in user preferences.).</td>
</tr>
<tr>
<td><img src="Image" alt="Workplace" /></td>
<td>Any subsequent options on the left-hand side of the navigation bar will be context sensitive to the work-space tile chosen. To the very right of the ‘Home’ button will be the name of the work-space chosen – ‘WORKPLACE’ in this example. Selecting this option will present a drop-down menu of tiles relevant to that chosen work-space.</td>
</tr>
<tr>
<td><img src="Image" alt="Tiles" /></td>
<td>From Microsoft Dynamics CRM and selecting Case Management, will return related entities; Case, Contacts, Accounts etc. Each of these service tiles have related records.</td>
</tr>
</tbody>
</table>

### The Right-hand Side

<table>
<thead>
<tr>
<th><img src="Image" alt="Quick Create" /></th>
<th>The ‘quick create’ button enables the fast creation of Case / Contacts / Accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="Image" alt="Quick Search" /></td>
<td>The ‘quick search box’ is very powerful. It will search for the characters entered, producing tiles on the main screen. Simply clicking on a tile will take the user to that part of the database.</td>
</tr>
<tr>
<td><img src="Image" alt="Advanced Find" /></td>
<td>The ‘Advanced Find’ button enables the user to specify a number of criteria in locating information within Microsoft Dynamics. (See Error! Reference source not found.)</td>
</tr>
<tr>
<td><img src="Image" alt="Settings" /></td>
<td>The settings button allows the user to personalise Microsoft Dynamics. (See Error! Reference source not found.)</td>
</tr>
<tr>
<td><img src="Image" alt="Help" /></td>
<td>The help button provides you with typical Microsoft help functionality in the form of a searchable user guide.</td>
</tr>
</tbody>
</table>
1.2 Setting your Home Screen

Dynamics can be personalised so that you do not have to have the System Default Options. Select the ‘Options’ option from the drop-down menu.

On the ‘General’ tab, clicking on the ‘Default Pane’ drop-down menu will allow you to select what work-space you would like your home screen to be set in.

After you selected the work-space you can click on the ‘Default Tab’ drop-down menu to select what Dashboard or View you would like your Home screen to take the form of.
Once you have the settings the way you want them, click ‘OK’ in the bottom right-hand corner of the ‘Options Window’ to save them.

**Records Per Page**

On the ‘General’ tab, to change the number of records shown per page in any list of records, select your preference from the ‘Records Per Page’ drop-down menu and click ‘OK’ in the bottom right-hand corner of the window to apply the setting.
Hints and Tips

Like most applications, MS Dynamics has some specific features. This hints and tips section provides guidance to ensure ease of use. Please read this section for awareness.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>Save can be actioned using any of the following options:</td>
</tr>
<tr>
<td></td>
<td>- The save button in the bottom right corner of a form</td>
</tr>
<tr>
<td></td>
<td>- <strong>Ctrl + S</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Save as</strong> option on the command bar (Generally for dashboards)</td>
</tr>
<tr>
<td>Searching</td>
<td><strong>The Search Box</strong></td>
</tr>
<tr>
<td></td>
<td>The ‘Search Box’ is available in various places within MS Dynamics. It can assist with reducing displayed lists and searching for data for using input fields. The * wildcard can be used within the search field. For example:</td>
</tr>
<tr>
<td></td>
<td>- <em>sal</em> will find all entries which include the letters <em>sal</em> within the text</td>
</tr>
<tr>
<td></td>
<td>- <em>History</em> will find all entries that include the word History</td>
</tr>
<tr>
<td></td>
<td><strong>The Alpha Bar</strong></td>
</tr>
<tr>
<td></td>
<td>When you select a list view, the ‘alpha bar’ will be positioned at the bottom of the list. Click on the appropriate letter to reduce the list to a particular alpha selection.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> For list view displays, the alpha bar search focuses on the highlighted column. If the column you wish to search within is not highlighted, click on the column heading. (This will also reorder the column into alpha order, clicking again will reorder in reverse alpha order.)</td>
</tr>
<tr>
<td>Mandatory</td>
<td>Mandatory fields are marked with a *.</td>
</tr>
<tr>
<td>Fields</td>
<td>If you attempt to save a form where all mandatory fields are not completed an error message will appear.</td>
</tr>
</tbody>
</table>
2 Cases

2.1 Create a Case

There are two ways to create a Case. Below details the full case creation steps:

Select Cases

When you are looking at cases select +New button.

On selection the General Enquiry case form will load, to allow the system to save the Case minimum details must be captured, the mandatory fields at present are Case Title, Case Concerning and Case Category. Priority is also a mandatory field, however is systematically pre-set to Normal.

Case Title is a free text field, Case Concerning is a look up to a number of records, and you could search by name, email address, SSO or SITS ID. Case Category is a drop down list.
Once the mandatory fields have been populated will then be able to save the Case and the ID field will auto populate with a unique reference code. Additionally the case form will expand to contain details that are specific to the Case Concerning, to the case. Once you have completed filling in the additional fields you must click Save (bottom right of view) or Save and Close to save the record.

The case has now been recorded and is shared with users in your team automatically.

### 2.1.1 Quick Create Case

Alternatively you can use the “Quick Create” functionality by using + Create button, choose Case and quickly create a case with the quick create case form.
2.2  Work on a Case

Find the case you wish to work on. There are a number of ways to do this which will depend on a few different factors.

- You can either use the Global search functionality which is always available for use no matter where you are in the system and will search through all entities within the Case Management application. This can be found in the blue bar at the top right hand side of the screen.

- You can search within the case entity using the search bar located at the top right of the view.

- You can search within the case entity using the search bar located at the top right of the view.
Once you have found your case, select it to open it.

You are now free to update the case in various different ways.

Most fields are free text, drop downs or dates and will appear and reappear depending on whether the case is about a member of staff, student, account or a contact. You can also change the Priority, Status, Risk Level and Due By on the case.

### 2.2.1 Activities

Within the Case form there is an activity section with Posts, activities and Notes.

If you wish to record phone calls, emails, tasks or appointments you can add activities to the case.
Phone calls allow you to record who the conversation was between, whether the call was outgoing or incoming and details of the conversations.

Tasks allow you to capture task subjects and descriptions, due dates, priority and owners.

Emails allow you to create and send emails within Dynamics, record the email subject, email body and recipients. Please review the Outlook Add-in guide for more information on sending emails through Dynamics and tracking emails from Outlook into Dynamics.

2.3 Linking Cases

You can also link other cases to your case by way of the similar cases, parent/child cases, merged cases and recent cases:
Similar cases allow you to search and link to completed cases with a similar title. This can be useful if you have previously dealt with the issue at hand and want to view the past resolutions.

Parent/child cases are another form of linking cases. This would typically be used when there are multiple cases that all require a Parent overarching case.

Merged cases as cases that have been actively merged with the case you’re working on. This may be used when there is a duplicate case for the same issue.

2.4 Reassigning a Case

If you have finished working on a case, or wish to assign a case owned by you to someone else you can reassign the case to another user.

Reassigning the case changes the cases ownership, therefore if you ASSIGN the case, you may no longer have access to that case.

To do this, select the Case from Case List view so that it is highlighted with a tick box and then the ASSIGN icon will appear.

On clicking Assign the Assign to Team or User box will appear where you can type or look up to the user you wish to assign the case to.

Look up will return the Look Up Records box
Please note that it is only possible to reassign a Case in Case List View, not within the case itself.

2.5 Sharing Cases

Cases can also be shared with other Dynamics users. To do this open the case and select the ellipsis button and then select the ‘Share’ button from that menu.
When you click share you will be asked who you would like to share the case with.

Click the ‘Add User/Team’ button and the system will display the Look Up Records box.

You can enter the user’s name and press enter (or click the magnifying glass) and the system will retrieve that person. You then need to put a tick next to that user selecting them and then click select. You can repeat this multiple times to add more and more users or you can change the value in the ‘Look For’ field to team and select an entire team of people.

When you Share a Case inside your Business Unit, the users Role Permissions will dictate their permissions on the case so there is no need to select Read/Write options.

When you Share a Case outside of your Business Unit you need to decide what permissions you give on the user on your case.

I. Read – will only be able to view the Case
II. Read & Write – will be able to read and write on the case, but not acuities
III. Read, Write & Append – will be able to read and write on the case and also the activities

2.6 Resolve a Case

Once the case has been completed it needs to be resolved. To set the case to resolved click the ‘Resolve Case’ button.
A window will now appear allowing you to enter the details of the resolution.

Fill in the details of the resolution

Resolution Type: Drop down
Resolution: Enter in keywords of the resolution, to aid reporting and similar cases functionality.
Remarks: Any additional remarks that may be of use

Once all the details have been filled out, click the ‘Resolve’ button. The case will now disappear from all views which look at active cases and all fields will become read-only.
## Sharing Decision Matrix

<table>
<thead>
<tr>
<th>When I share a case with someone outside my BU I want to....</th>
<th>Read</th>
<th>Write</th>
<th>Delete</th>
<th>Append</th>
<th>Assign</th>
<th>Share</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove all permissions</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>Although the case is Read Only, the person with whom it has been shared can create/edit activities and notes and create parent-child relationships.</td>
</tr>
<tr>
<td>Allow the person to only 'read the case'</td>
<td>✓</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>✗</td>
<td>Append permissions are always required when granting 'Write' permissions. If Append is not granted they will not be able to change the Case Concerning nor add activities to case. User will not be able to share the case.</td>
</tr>
<tr>
<td>Allow the person to read and amend the case</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
<td>✓</td>
<td>✗</td>
<td>✗</td>
<td>No end users can delete cases (only system administrators). Granting Delete permissions just allows user to delete any activities, including those created by other users.</td>
</tr>
<tr>
<td>Allow the person to read, amend and delete activities and documents relating to a case</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
<td>✗</td>
<td></td>
</tr>
<tr>
<td>Allow the person to read, amend and share the case</td>
<td>✓</td>
<td>✓</td>
<td>✗</td>
<td>✓</td>
<td>✗</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Allow the person to read, amend, delete activities/documents, and assign the case (full control)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Granting both delete and assign means user with these permissions can reassign case to any specific user, any team or themselves.</td>
</tr>
</tbody>
</table>

### 2.7 Cancel a Case

Alternatively, you can choose to cancel a case which also makes the case inactive but doesn’t take you through the resolve process like when you resolve a case. This should only be one if you created the case in error.

To cancel a case select the ‘Cancel Case’ button at the top of the case screen.
Once you click the button a window will appear asking you to provide a cancellation reason.

Select the appropriate reason and click ‘Confirm’. Once you have done this the case will be set to cancelled. The case will disappear from all views which look at active cases and all the fields will become read-only.

You can reactivate a Resolved or Cancelled Case at any time – view the Case and select the Reactivate Case icon.

3 Cases with Documents

Whilst working in your case you can access SharePoint to store case related documents via the ‘Documents’ button.

When you click the button a new window will appear showing SharePoint.
From here, you can start adding documents and folders to this directory. To add files you can click ‘new document’ to display a new window.

Click the browse button to navigate to the file on your PC or network drive. Once selected you can optionally enter version comments. This can be useful if you are dealing with a document that will contain many revisions.
You are also able to simply drag files and folders into SharePoint to upload them. When you drag a file or folder over the SharePoint window you should see something like the below.

Let go of the mouse button and the file or folder will be uploaded. This is a much quicker way of uploading documents to SharePoint.

Once you have files and folders in your case folder, you can start moving documents around and even dragging them into other folders within the main case folder.

SharePoint functionality is the same as Nexus – Check Out, Check In, Edit, Version History.

3.1 Enabling Save to SharePoint Functionality

Prerequisite:
- You must have an MS Office document saved on SharePoint first. Open Dynamics and find one of your cases that have documents stored on SharePoint.
- You must have Microsoft Office 2013 installed on your PC.
NOTE: This guide goes through how to enable this functionality for MS Word documents and will not enable the same for other MS Office documents (Excel, PowerPoint, Project, etc.). To enable this for other MS Office documents follow the same steps but replacing the Word document with a different MS Office file.

Open the case and click the ‘Documents’ button to go to the document screen.

When the SharePoint frame loads and you can see your files and folders.

Click on the word document and click on ‘edit’.

Enter your credentials
The relevant MS Office application will now open and shortly afterwards the document contents will be visible as well.

NOTE: you may need to click ‘Edit Document’ at the top of the document window to enable to the next steps.

Click ‘Save’

Now the next time (and every time after that) you open a MS Office document will see the option to save directly to SharePoint without having to open Dynamics or SharePoint.

To confirm this has worked and ensure you can see the SharePoint save as button, open Word and start creating a new document.

Click ‘File’ and then click ‘Save As’.

You should now see the SharePoint icon which will enable you to select from a list of recent SharePoint folders to save the document to and also to browse other folders by using the ‘Browse’ button.
When you select ‘Browse’ you will be able to see folders other than the ones in your ‘Recent Folders’ list. When browsing SharePoint folders you will only see folders for cases your team can see i.e. someone in the Proctors Office Team will not be able to see folders for cases pertaining to the Student Information team.

3.2 Locking Documents

In certain situations, you may wish to lock certain documents within SharePoint 2013 to prevent its contents from being seen by other users of the system. This is typical if you are dealing with a sensitive document or a draft document not in its final state.

Click the ‘Documents’ button to open SharePoint iframe (or separate window if still using the interim solution).
When SharePoint opens, find the document you wish to lock.

Click the ellipsis to open the context menu, then click another ellipsis to see further options against the file.

When the full options are visible, click the ‘Shared With’ button to access to see the list of users the document is shared with. By default the individuals in your immediate team will have access to the document.

With this screen open click the ‘Advanced’ button.
In the next screen you will again see the users who have access to this file along with their permission levels. By default, the users in your immediate team will have access to the files stored in your team’s cases.

To remove this default click the ‘Stop Inheriting Permissions’ button.

You will see a message warning you that you are about to create unique permissions. Click ‘OK’ on this.

Now the options at the top of the SharePoint screen will have changed and you will also be able to select each users to remove or grant extra permissions.
To secure the document select the users you don’t want to be able to view it and click ‘Remove User Permissions’
Once again you will see a prompt appear on screen warning you that you will remove permissions to this document for the selected users.

The permissions will now be updated and the removed users will no longer be able to see the document.
3.3 Sharing with Users from Other Teams

You can also at this point add in additional users from other teams who didn’t originally have access to the file. To do this click the ‘Grant Permissions’ button.

A new window will now appear allowing you to enter the users you wish to share the file with.

Enter the users in the ‘Invite people to ‘Edit’’ section and click ‘Share’
You will now need to send a link to that document to the user so they can access it. As they’re from another team, they will not be able to find the folder which the file resides in so a link to the file is the only way to see it.

To send the link, click the ellipsis button against the file to see more options. Then copy the URL you can now see and paste it into an email.

Hi,

Here is a link to the document.

https://sp5.dynamics-dev.ox.ac.uk/incident/Query%20CM-017392-27W9%E6%96%87%E6%A%20confidential%20file.txt

Kind Regards,
Jamie

Jamie Taylor
Senior Business Analyst
IT Services / University of Oxford
Darlington House, University Office,
Wellington Square,
Oxford OX1 2JD
T: 01865 811844
www.it.ox.ac.uk
If you wish to revoke this and go back to the default permissions, click the ‘Delete Unique Permissions’ button.

Click OK on the prompt window when it appears

The permissions will now revert back to the default.

3.4 Mapping the case management SharePoint site to your computer

Mapping the case management SharePoint site to your computer allows you to access the case documents using windows explorer rather than via Dynamics. This is particularly useful if you need to make adjustments or simply call up documents from word to edit quickly.
In start menu > right click on Computer > select map network drive

Select “Connect to a Website that you can use to store your documents and pictures” > Hit Next twice
Enter URL of case management SharePoint site > next

Add a recognisable name for the folder e.g. Case Management Documents > hit next twice.

4 Contacts and Accounts

Contacts are automatically populated with records from the Staff and Student feeds, these are viewable within the Contacts tile, or searchable by Oxford SSO, SITS ID as well as name.

There may also be a need to create a Non-Oxford Account for an Account, whether this is for an external lawyer, building or exam board. Cases can be created about Staff or Student Contacts, Created Contacts and Accounts.
4.1 Create an Account

From the Case Management work area select the ‘Accounts’ entity.

Click the ‘New’ button to bring up the new account form.

When the new account form appears, enter the relevant details for that account.
Once all the details have been entered, click the Save (or Save & Close) button to save the account record.

The account record is now created and only visible to you and individuals in your team.

You can also use The “Quick Create” functionality to create an Account quickly, to add more details later on.

### 4.2 Create Non-Oxford Contact

From the Case Management work area select the ‘Contacts’ entity.
Click the ‘New’ button to bring up the new contact form.

When the new contact form appears, enter the relevant details for that person.
Once all the details have been entered, click the Save (or Save & Close) button to save the contact record.

The contact record is now created and only visible to you and individuals in your team.

You can also use the “Quick Create” functionality to create an Account quickly, to add more details later on.

Note: You can also create a new Account / Contact when you are creating a Case by selecting “New” on the Look up.

4.2.1 Sharing Contacts / Accounts

In order for another team to be able to see / amend the Contact or Account it must be shared. To do this open the contact/account and click the ellipsis button followed by the ‘Share’ button.

Next you will need to select the team you wish to share the contact/account with. Click on ‘Add User/Team’
Now select the user or the team you wish to share with and put a tick next to their name, click ‘Select’ to select them and then click ‘Add’.

The user is now ready to have the contact/account shared with them. To complete the process click ‘Share’.
The contact/account is now shared with that user or team.

5 Managing Shared Team Mailboxes in Dynamics

Many teams’ casework will originate from emails sent to generic shared mailboxes such as e.g. adminteam@ox.ac.uk. As such a mechanism to monitor, allocate, respond to and create cases from emails in these team mailboxes is required.

All team mailboxes will be created in Dynamics and members of the shared mailbox will be added to the team. Emails sent to the team mailbox will track to Dynamics using ‘Server Side Synchronisation’. I.e. a copy of the email will be sent from Exchange server to Dynamics. Any action undertaken in Dynamics is distinct and unrelated to actions carried out in Outlook.
5.1 Shared Mailbox Queues

Each mailbox will have an associated queue which can be accessed via the site Map:

A number of system views are accessible for each queue. The view below shows a view of all items in a single queue. Personal views can be created for queues (see section 6).
When emails are received into a shared mailbox a number of initial actions can be undertaken by the case worker from the queue:

**Pick** – Assigns the email to you and marks that you are working on it

**Route** – Assigns email to another user and marks their name as ‘worked by’

**Release** – Un-assigns the email and removes the ‘worked by’ details

**Remove** - Removes the email from the queue (this does not delete the email).

To open the email then double click on the left hand side and the email will open.

From here a number of actions can be undertaken: Reply, Reply all, Forward, Save, Convert to, Delete.

Most actions will be familiar from experience with email handing.

Using the convert to function caseworkers can convert the email into a new case:
Select the customer (case concerning) and the subject (case category), then hit convert.

A new window will open showing the new case.

The case title will default to the email subject title.

The email will be tracked in the case activities.

From here you can add and amend any case details before saving.

From this point on all emails received as part of the same ‘conversation’ will be tracked against this case.

Once an email has been dealt with it should be removed from the queue.
6 Creating Views, Charts and Dashboards

Views are sets of columns within Dynamics which are grouped together to form a single view of data. These views can then be selected from a drop down list in the main case view screen. A view can be created for each entity within Dynamics (contacts, cases, accounts, etc.) Charts can be created from the views you build and dashboards are a collection of views and charts on one screen.

Views can be created on any drop down by selecting “Create Personal View” or through Advanced Find.

Select the Advanced Find, which will return the below Advanced Find query window.

Click ‘Select’ to make a drop down box appear. This drop down box will contain all the fields associated with a single case record. Select a field to make it appear where ‘Select’ once was.

This field will now appear in the advanced find query.

You can now add additional fields to further refine the query, whether this is Case Status, Case Due By, Case Created By, Case Resolved on etc.

You may also wish to add filters against the fields to restrict certain records from being returned in the query. For example you may only want to see cases where the status is ‘Resolved’. 
The Query will default to querying the cases with AND. For Example Cases = Status Resolved and Case Category = General Enquiry. You are able to also use the Group OR function if you wanted to query Or

To ensure only resolved cases are shown, we now need to tell the query to only select cases where ‘Status’ = ‘Resolved’. With the list of values open, select ‘Resolved’ and click the button with the arrows pointing towards the box on the right to add this to the Selected Values list.
Once you are happy with the fields you have selected for the query, you will need to first execute it to make sure that it will return the correct data. To do this click the ‘Results’ button (button with the red exclamation mark) which will show the results of the query.

If the query does not return any records, you may need to alter the search criteria and then click ‘Results’ to re-run the query.

At this point you may wish to include additional columns to the view. By default Case Title, Case Number and Created On are included in the view. To add columns, open the ‘Advanced Find’ tab and select ‘Edit Columns’.
A new window will appear showing the columns which will be displayed in the view. You can add, remove and move columns in the existing view by using the buttons in the ‘Common Tasks’ section.

When you have included the desired columns in the view, click OK to save this configuration and to be returned to the ‘Advanced Find’ window.

Click the ‘Advanced Find’ tab to go back to the search criteria section.

Click ‘Save’.
Now you may enter a name for the view and optionally a description. Click ‘Save’ after entering this information.

A message will pop up on the bottom left of the Advanced Find window to say that the view has been saved.

You can now close the Advanced Find window and return to the main case view screen. From here you should see your saved view in the drop down list of views, and you can Pin it to make it your default.

6.1 Share a View with a Team
If you wish, you may share a view you have created so that it is visible by other members of your team. This means that when they use the system, they will also see your personal view and be able to select it. This can be particularly useful when you have a large number of team members and don’t want them to have to create the same view individually.

Either select the View and select “Create Personal View” or Select “Advanced Find”

Click ‘Saved Views’ to see a list of your personal saved views.

Click next to the view you wish to share which will put a tick next to it.

Click the ‘Share’ button.
The Share Saved View window will now appear allowing you to select the person or team you wish to share the view with. Click the Add User/Team button.

You can choose to look at either users or teams to share the view with, and their permissions whether it's Read only, Read and Write.
Now click ‘Add’ and the contact will be added to the list of shared Users
6.2 Create a Chart

Now that Personal Views have been created you can create Charts automatically from them or create your own charts.

Upon clicking the bar, the charting tool will slide out showing the various controls for creating charts.
Click the “+” button to create a new chart

Upon click the “+” button you will see the chart designer screen
The first thing to do is to select a field to make up the series (the vertical axis on a bar chart). You can select any field associated with cases, in this example we will just select ‘Case’.

Next select what cases you want to include in the drop down box next to the series you have selected. In this example we will use ‘Count:All’.
You can also select the type of chart you wish to create by clicking the bar chart icon. In this example we will use a simple bar chart.
Now we will select what will appear on the horizontal axis. In this example we will select ‘Priority’ to create a chart to graphically show the amount of high, medium and low type cases.

Note that the system will populate the title of the chart based on the axis you have chosen.

You can additionally add further fields into each axis as well as change the chart type but remember to use the preview window within the chart designer to make sure the configuration you have selected is usable.

When you’re happy with the configuration click the save button to save the chart.
You should get a notification to say that the chart has been saved at the bottom of the chart designer window.

### 6.3 Creating Dashboards

Dashboards are collections of views and charts displayed on one screen to the user. They are typically the first screen the user will see when they log into Dynamics and so should contain the most important information. To create a dashboard navigate to Dashboards in the Case Management workspace.

You may need to scroll through the available functions within Case Management to find the Dashboard button. Once you have found it click it to open the dashboard screen. From here you can view the list of available dashboards or create your own. Click the New button to create a new dashboard.

The next window that appears will ask you to select a layout for the dashboard. You can select any one you wish but in this example we will select ‘3-Column Regular Dashboard’. Select this and click ‘Create’.
Once you have entered a name, click on either the chart button or view button to add one or the other to the first block in the dashboard.

In this example, we will add a view by clicking on the add view button. The Add Component window will now appear asking you to select the record type of the view you wish to add.

Select Case as the record type (or whatever record type your view is based upon) and then select the view from the View drop down box.
Once you have select the record type and the view click ‘Add’ to add the view to the dashboard.

The view is now added to the dashboard as shown in the below screenshot.

Move over to the next block in the dashboard and add a chart by selecting the add chart button in the middle of the empty block.

Once again the Add Component window will appear asking you to select the record type, view and now also the chart. Select the record type as Case (or whatever your view is based upon), select the view your chart is based on and finally select the chart.
Once you’re happy, click ‘Add’ to add the chart to your dashboard. The dashboard should now contain one view in the upper-left block and a chart in the upper-middle block.

To complete the dashboard setup click the save button at the top of the screen and the dashboard will be saved and ready to use.

You can now click the close button to close the screen and go back to the main dashboard screen. From here you can select the dashboard which has just been saved (you may need to press F5 to refresh the screen before the new dashboard appears in the list).
7 Email Templates

To create an email template select the **Options icon** for “Set Personal Icons” and select Email Templates.

Select New and within the Template Type select “CASE”
Enter in Title, Description and Subject and enter in the Body of the email template. You can also Insert/Update data field values.
You can then select which entity the field you want to add comes from (usually if you are creating a case template it will be case).

In the field dropdown select the field you want for example ‘case concerning’. Click ok

When you are happy click save.
Once you have saved you can make the template available to other users in your business area then hit “Actions” then “Make template available to Organisation”.

To use the template hit insert template when creating and email in a case and select the template.
8 Reports

8.1 Creating Reports using the Report Wizard

To create a report in Microsoft Dynamics you need to navigate to the ‘REPORTS’ view in the Workplace:

- This will take you to the ‘Available Reports’ View.
- To create a new report click on the ‘NEW’ button in the command bar.
- This will take you to the ‘New Report Window’.
• From here click on the ‘Report Wizard’ button to run the Report Wizard. This will open the report wizard window.

• Leave the ‘Start a new report’ radio button checked and click ‘Next’ to continue.
This will take you to the ‘Report Properties’ screen.

- Fill in the report name and primary record type and click ‘Next’ to continue.

This will take you to the ‘Select Records’ screen.

- Select a saved view (or specify a new view) to filter the data that will be included in your report and then click ‘Next’ to continue.
This will take you to the ‘Lay Out Fields’ screen.

- Click on the ‘Click here to add a column’ space to add columns to your report (you can add as many as you like).

*You can add groupings on this screen by clicking the ‘Click here to add a grouping’ space.

The ‘Add Column dialogue box will pop up. Here you can specify the column that you wish to add.

- Add a column by populating the column field.
• When you are happy with your column’s parameters click ‘OK’.
• To add another column repeat the last three steps, and when you are happy with your columns, click ‘Next’.

This will take you to the ‘Format Report’ screen. The ‘Format Report’ window allows you to select the format of your report.

• For the purposes of this example we are going to leave the ‘Table Only’ radio button checked and we are going to click ‘Next’.
This will take you to the ‘Report Summary’ window. This gives us a chance to review the primary details about the report we are creating.

- Click ‘Next’ to create the report.

Once the report is created the ‘Report Successfully Created’ dialogue box will show. From here you can click ‘Finish’ to close the wizard.
8.2 Running Reports

- To run a report, navigate to the ‘Available Reports’ View in the ‘REPORTS’ workspace of Workplace and click on the name of the report that you would like to run.

This will open the ‘Report Viewer’ window.
From the ‘Report Viewer’ window click on ‘Run Report’ to run the report.

The report will then be displayed in the window as below:
9 Case Super User

9.1 Create SharePoint Folder Structure

The instructions below describe how a Super User can create default folder structure for a specific case category or for a team.

---

*NB. You can only create a folder structure for either a category or a team. You cannot do both at the same time.*

---

Navigate to Case Management > SharePoint Folders

Click New

Enter the Name of the folder structure. This first folder is the parent folder and will not be visible in SharePoint.

Enter the entity name, this will always be “Case”.

Enter the Business Unit who will be able to access the structure

Enter either the case category which you want the structure to be applied on OR the name of the team which will have the structure applied on.

If you select the team name all case categories will have the folder structure applied.
Save your entries

When you save you will notice that folder structure is automatically owned by the BU super user team.
Now you have created the parent folder you need to created subfolders for this folder structure.

Sub Folders

Click on the plus sign to create a new subfolder, then search and click new.

SHAREPOINT FOLDER : INFORMATION

New SharePoint Folder

General

Then name your sub-folder and save and close.

The new sub-folder will be visible listed under the parent

Sub Folders
Once you have a parent folder and a sub-folder then you will see a hierarchy view. Click to see your SharePoint folder structure.

### 9.2 Create a new Email Workflow

To create a new email workflow you can Select Settings and then Processes or click on the ‘Advanced Find’ button on the Navigation bar. This will open the ‘Advanced Find’ dialogue box:

Select ‘Processes’ from the ‘Look for’ drop-down menu and select ‘Results’ from the Show group on the ribbon.
Then select ‘New’ to create a new email workflow.

![Create a new process](image)

The first screen (Process: New Process Screen) you see allows you to enter basic details for the Email template you are creating:

You must first enter a Process name for the template, and you must choose a work-space for the type of record it will be related to.

![Create Process](image)

In this scenario we are linking to the case record so select people (you can type ‘C’ to jump to records starting with ‘C’).

You must then select a category of ‘Workflow’. If you had started from a Placements view then you should chose Placement; for Application records, chose Application. *If there was not a template you could use you would choose the “New blank process” radio button.

Then click ‘OK’, when ready to proceed.
The Workflow settings screen is displayed.

Select ‘Add Step’ and choose ‘send Email’. Then click the ‘Set Properties’ button (you must select ‘As an on-demand process’ to run this workflow on demand).

The next screen (below) is where you write the content of the email that you want to send.

You can add any text that you like. To create dynamically populated values from the database you can use the ‘Form Assistant’ on the right.

For example: to add the Owner of a Case, you do the following.

- Place the cursor where you want to add the field.
- Make sure the ‘look for’ type is set to ‘Case’.
- Select ‘Case Owner’ from the list of attributes.
- Click ‘Add’ to add to the list of fields.
- Click OK to move the field into the email text.
*If you want to add another field, you must remove the one you’ve just copied, by highlighting the field and pressing the ‘Remove’ button.

*If you want to add a field from a record which is related to the main record type, you can select a different record type and then follow the steps above.

This will take you back to the previous ‘Process Information’ screen. Click the ‘Activate’ button to enable the email to be sent.

Click ‘Activate’ when the dialogue box appears.
The menu options at the top of the screen will change when the process has been activated (as below). Press ‘Close’ to leave this screen.

9.3 Case Categories – Subject Securities

Select Settings, Business Management options will appear.

Select Subjects

You will be presented with existing Case Categories “Subjects” for your Business Unit.

Within Subjects Select Add a Subject – you’ll then presented with the Add Subject box and required to enter a Title and if required the Parent Subject (Tree). You can also click the existing Parent Category and Add a Subject from there.

To then Share the Case Categories navigate to “CASE MANAGEMENT” and EXTENSIONS to Subject Securities.
You will then be able to select a Subject to Share to the Team who need to view it. Both PARENT and SUB CATEGORIES must be shared to be visible.

Search for team(s) you want to share with

Select teams

NB: The case category must always be shared with the Business Unit’s Super User Team in order for ongoing maintenance of the category to be possible.
Decide which permissions you want to grant to teams.

*NB the super user team must have all permissions granted, but the other teams should only have the read permission.*

If you want to change whether email recipient ‘to’ field is auto-populated when you send an email from a certain case category you can edit the case security as below:

Highlight the categories you want to amend and click EDIT.

*NB you can edit multiple categories by ticking multiple lines.*
Other/General Enquiry

General

Name*: Other/General Enquiry
Owner*: Dominic Crean
Subject: Other/General Enquiry

Auto populate email: No

You can choose whether to auto-populate email recipient by selecting Yes/no.

*NB the default is always set to yes, so if you do not want the recipient to be auto-populated for a case category you should change to ‘no’. 
General Hints and Tips

Like most applications, MS Dynamics has some specific features. This hints and tips section provides guidance to ensure ease of use. Please read this section for awareness.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Save</strong></td>
<td>Save can be actioned using any of the following options:</td>
</tr>
<tr>
<td></td>
<td>• The save button in the bottom right corner of a form</td>
</tr>
<tr>
<td></td>
<td>• Ctrl + S</td>
</tr>
<tr>
<td></td>
<td>• Save as option on the command bar (Generally for dashboards)</td>
</tr>
<tr>
<td><strong>Searching</strong></td>
<td>The Search Box</td>
</tr>
<tr>
<td></td>
<td>The ‘Search Box’ is available in various places within MS Dynamics. It can assist with reducing displayed lists and searching for data for using input fields.</td>
</tr>
<tr>
<td></td>
<td>The * wildcard can be used within the search field. For example:</td>
</tr>
<tr>
<td></td>
<td>• *sal will find all entries which include the letters sal within the text</td>
</tr>
<tr>
<td></td>
<td>• *History will find all entries that include the word History</td>
</tr>
<tr>
<td><strong>The Alpha Bar</strong></td>
<td>When you select a list view, the ‘alpha bar’ will be positioned at the bottom of the list. Click on the appropriate letter to reduce the list to a particular alpha selection.</td>
</tr>
<tr>
<td></td>
<td>Note: For list view displays, the alpha bar search focuses on the highlighted column. If the column you wish to search within is not highlighted, click on the column heading. (This will also reorder the column into alpha order, clicking again will reorder in reverse alpha order.)</td>
</tr>
<tr>
<td><strong>Mandatory Fields</strong></td>
<td>Mandatory fields are marked with a *.</td>
</tr>
<tr>
<td></td>
<td>If you attempt to save a form where all mandatory fields are not completed an error message will appear.</td>
</tr>
<tr>
<td>Feature</td>
<td>Guidance</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Number of Rows on a Form</td>
<td>The default number of rows displayed on a form in list view is 50. This can be adjusted:</td>
</tr>
<tr>
<td></td>
<td>• Click on the ‘Settings’ button on the ‘Navigation Bar’.</td>
</tr>
<tr>
<td></td>
<td>• Click on ‘Options’ from the drop-down list.</td>
</tr>
<tr>
<td></td>
<td>• From the General tab of the Set Personal Options dialogue box click on the drop-down arrow next to Records Per Page and select the number of rows you wish to appear.</td>
</tr>
<tr>
<td></td>
<td>• Click on the button.</td>
</tr>
<tr>
<td>Refresh</td>
<td>To refresh a form select the [FS] key.</td>
</tr>
<tr>
<td>Notes sections</td>
<td>A notes section is located at the bottom of forms within MS Dynamics for free text entries.</td>
</tr>
<tr>
<td></td>
<td><strong>Warning:</strong> For Data Protection Act and security reasons, take care if using this functionality. Any information recorded in this area will be viewable by all users whom have access to the record.</td>
</tr>
<tr>
<td>Attachments</td>
<td>Documents, can be attached to the Notes section by clicking on the button in the Notes section of a form. Click on browse to find the file, once the file is located and opened, click on Done to attach it:</td>
</tr>
<tr>
<td></td>
<td>The file can be accessed through the Notes section as shown below:</td>
</tr>
<tr>
<td>Look up Fields</td>
<td>To look up a field within a form there are two ways in which you can do it:</td>
</tr>
<tr>
<td></td>
<td>• Type in as much of the search item as you can and press the down arrow:</td>
</tr>
<tr>
<td></td>
<td>• Click on the icon to return a list of results that match your search criteria.</td>
</tr>
</tbody>
</table>
### Recently viewed

The Recently viewed functionality provides an alternative to having to locate recently opened forms manually.

- Using the **Navigation Bar**, navigate to the type of work tile that the form resides in. In the below example, the ‘TREES’ tile.

![Navigation Bar Example](image)

- Clicking the down arrow at the end of the left-hand side of the ‘Navigation bar’ will provide a drop-down menu of recently viewed records/views in the form of tiles.

![Recently Viewed List](image)

### Audit History

Each work-space within MS Dynamics has an audit history which can be found by clicking the down arrow at the end of the left-hand side of the ‘Navigation bar’ within the form, and selecting the ‘Audit History’ tile.

![Audit History Tile](image)

This will bring up the audit history of the selected work-space:

```
GENUS: INFORMATION
Crataegus

Audit History
```

<table>
<thead>
<tr>
<th>Changed Date</th>
<th>Changed By</th>
<th>Event</th>
<th>Changed Field</th>
<th>Old Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>19/02/2013 11:51</td>
<td>Paul Williams</td>
<td>Create</td>
<td>English Name</td>
<td>Matthoms</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Name</td>
<td>222</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Owner</td>
<td>Paul Williams</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Status</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Status Reason</td>
<td></td>
<td>Active</td>
</tr>
</tbody>
</table>

1-1 of 1
## 10 Appendix – Keyboard Shortcuts

<table>
<thead>
<tr>
<th>To</th>
<th>Press</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move to the next option, option group, or field</td>
<td>Tab</td>
</tr>
<tr>
<td>Move to the previous option, option group, or field</td>
<td>Shift+Tab</td>
</tr>
<tr>
<td>Complete the command for the active option or button</td>
<td>Enter</td>
</tr>
<tr>
<td>Move between options in an open list, or between options in a group of options</td>
<td>Arrow keys</td>
</tr>
<tr>
<td>Cancel a command, or close a selected list or dialog box</td>
<td>Esc</td>
</tr>
<tr>
<td>Save</td>
<td>Ctrl+S or Shift+F12</td>
</tr>
<tr>
<td>Save and Close</td>
<td>Alt+S</td>
</tr>
<tr>
<td>Cancel edits and close (Close)</td>
<td>Esc</td>
</tr>
<tr>
<td>Open search</td>
<td>Spacebar or Enter</td>
</tr>
<tr>
<td>Delete text from a field</td>
<td>Backspace</td>
</tr>
<tr>
<td>Delete the record (when forms are in Edit mode)</td>
<td>Ctrl+D</td>
</tr>
<tr>
<td>Save and then open a new form (Save and New) (when forms are in Edit mode)</td>
<td>Ctrl+Shift+S</td>
</tr>
<tr>
<td>Move to another field or command</td>
<td>Tab</td>
</tr>
<tr>
<td>Open the lookup menu with the most recently used items in alphabetical order</td>
<td>Alt+Down Arrow</td>
</tr>
<tr>
<td>Open the list menu (when forms are in Edit mode)</td>
<td>Ctrl+Shift+2</td>
</tr>
<tr>
<td>Navigate to the next item on the list (when forms are in Edit mode)</td>
<td>Ctrl+&gt;</td>
</tr>
<tr>
<td>Navigate to the previous item on the list (when forms are in Edit mode)</td>
<td>Ctrl+&lt;</td>
</tr>
<tr>
<td>Open lookup drop-down list</td>
<td>Enter</td>
</tr>
<tr>
<td>Close lookup drop-down list</td>
<td>Esc</td>
</tr>
<tr>
<td>Auto-resolve lookup value</td>
<td>Ctrl+K</td>
</tr>
<tr>
<td>Open a record found in lookup with forms in Edit mode</td>
<td>Enter</td>
</tr>
<tr>
<td>Open a record found in lookup with forms in Read-optimized mode</td>
<td>Ctrl+Enter</td>
</tr>
<tr>
<td>Add a step in the business process editor</td>
<td>Alt+Shift+N</td>
</tr>
<tr>
<td>Tab to Command Bar when in the updated user experience</td>
<td>Ctrl+[</td>
</tr>
<tr>
<td>Tab to process control when in the updated user experience</td>
<td>Ctrl+]</td>
</tr>
<tr>
<td>Tab to the Navigation bar</td>
<td>Ctrl+Shift+3</td>
</tr>
<tr>
<td>Insert article (when editing an email message)</td>
<td>Shift+Alt+A</td>
</tr>
<tr>
<td>Apply email template (when editing an email message)</td>
<td>Shift+Alt+T</td>
</tr>
</tbody>
</table>