Manuals for CCS Service Request for SharePoint
www.sharepoint-applications.biz

Users, Admin, Staff

Users: You can create users and assign permissions as needed.

Admin: The Admin has the rights to modify all items in the lists and libraries and to add columns or change views in lists.

Staff: The Staff can modify all items in lists and libraries, but they cannot add columns or change views.

Employees/Users: The Employees can create tickets and can view their own tickets (but not modify them after they are created).

Service Areas

Service Areas: The Service Areas keep tickets, lists, utilities, and functionality separate. This applies when different groups are working on different tickets, such as using the CCS program for both IT HelpDesk and Facilities. Both of these Service Areas (and more) can be under the same CCS Service Request program, but they are separated into different sites each having its own permissions and settings.

Customizing Category and Issue Type Lists

Each Service Area has its own Category and Issue Type settings. These are set up in the Service Area by the Admin using the Application Administrator Workspace that is part of the CCS Service Request program. Category and Issue Type are drop-down boxes on the Ticket form. All the Issue Types show up when no Category is chosen, but once a Category is chosen, the Issue Type list is restricted to the ones that are associated with the Category. This allows a "cascading" set of lists -- first choose Category, then choose an Issue Type for that Category.

How this is done and how to modify is as follows:

The Category and the Issue Type are their own lists, viewable by going to Application Administrator Workspace for the Service Area. To modify these lists, choose the Category/ Type Setup tab on the Application Administrator Workspace and click the appropriate list to open it up.

Each item in the Category list is simply a Category name in the Title field.

Each item in the Issue Type list has a name in the Title field, but is also linked to a Category by the "Category" field on the Issue Type item.

You can modify both of these lists as appropriate for the Service Area that you are working in.

Note also that either of these lists can be opened in Datasheet mode to allow quicker data entry and modification to the lists.

Incoming Email Settings

In each Service Area, the Email Tickets list can be setup to receive email, which is then converted to an item in that Ticket list. The email address of the Email Tickets folder can be set how you want, with your domain.

Also, as part of the conversion of the email to a ticket, a Notification is sent out as configured in the New Ticket Utility, which is explained in another item in this list.

New Ticket Utility

In a Service Area (such as IT HelpDesk), the admin can go to the Application Administrator Workspace, then the Notification tab. One of the lists there is New Ticket Utility. This list has one item in it, "New Ticket Notification". This utility is used to set up who gets notified of a new ticket and what the content of the email is.

Notify Requester, Notify Additional Contact, Notify Staff are Yes/No.

Mail Subject and Mail Body use HTML and our internal field tags (in << field >>) to set up the message subject and body.

Notifications on Ticket Assignment and Completion

In a Service Area (such as IT HelpDesk), the admin can go to the Application Administrator Workspace, then the Notification tab. One of the lists is Notification on Ticket Assignment; another is Notification on Ticket Completion. Both of these lists have one item in ithem, "Notification on Ticket Assignment" or "Notification on Ticket Completion".

These utilities are used to set up who gets notified of a ticket assignment and completion and what the content of those emails are.
Notify Requester, Notify Additional Contact, Notify Staff are Yes/No.
Mail Subject and Mail Body use HTML and our internal field tags (in << field >>) to set up the message subject and body.

Changing Views on the Lists

The Views on the SharePoint lists can be changed in the Settings/List Settings/View section of that list.

Workspaces -- My Service Requests tab

The "My Service Requests" tab shows all the tickets for the currently logged on user. That is, it lists the tickets where the logged in user is the "Created By" or "Requester" on that ticket.

Workspaces - Staff and Manager

Staff and Manager Workspaces are available in the individual Service Areas. These give a comprehensive view of the tickets with graphical interfaces and reporting.

Staff Workspace -- shows tickets assigned to the logged in user

Manager Workspace -- shows an overview of all the tickets

SLA (Service Level Agreements)

SLA Definition and Implementation:

Rank:

Rank is used when a ticket matches more than one SLA. For example:

Consider of there are two Items in SLA Implementation as below

(Note: "Any" means empty.)

Category	Issue Type	Priority	SLA	Contact
Cat1	Type1	High	Silver	Any
Any	Any	Any	Gold	contactABC

In the above case, If a ticket submitted with Cat1, Type1, High and contactABC, then both SLA Implementation items (Gold and Silver levels) will match.

In that case, we use RANK, such that the SLA item having the highest RANK will be considered ("1" is consider highest, then "2", etc.). If Silver (Rank=2) and Gold (Rank=1) both match, then Gold will be used.

Resolved In (Hours:Minutes): [Used to calculate Due Date in Ticket]

"Resolved in" is used to calculate Due Date on the Ticket. If the SLA Implementation item matches the currently submitted ticket, then the Due Date of the ticket will be set using "Resolved In" added to the ticket creation time.

Response Due (Hours:Minutes):

"Response Due" is used to calculate the Response Due time in the Ticket. If an SLA Implementation item matches a newly submitted ticket, then corresponding Response Due in the SLA Definition will be added to the ticket creation time to set the Response Due of the ticket.

Overdue Notification: [To whom we need to send alert when a ticket is overdue.]

"Overdue Notification" is used to indicate whom to send an Alert to when a ticket is overdue. The field called "Overdue Notification" on the ticket is auto-filled with the "Overdue Notification" value from the SLA Definition if any SLA matches the ticket.

Escalation Time: [Time after a ticket is overdue]
If a ticket is not completed even after the ticket is overdue, then we use Escalation Time to send an Escalation Alert. This field is used to calculate Escalation Time in the Ticket. If SLA Implementation item matches the currently submitted ticket, then corresponding Resolved In + Escalation Time + Created Time will be set to Escalation Time of the ticket.

Escalation Email: [To whom we need to send Escalation alert]
If a ticket is not closed even after the escalation time, the alert will go to Escalation Email.

Document Libraries - How To Use

The Service Request and Customer Service programs come with a variety of Document Libraries. These can be used, modified, added to, or otherwise customized to fit your needs.

A Document Library is a repository of many types of files, much like a File Directory. Document Libraries have more control over the documents, however, through features like versioning, check-in/check-out, and permissioning.

Here is a link to a Microsoft Tutorial on "Working with SharePoint document libraries":
http://office.microsoft.com/en-us/windows-sharepoint-services-help/working-with-sharepoint-document-libraries-HA001141287.aspx

There are many other resources online, in books, and in SharePoint itself to guide you and your users on how best to use this important SharePoint feature.