Quick Start Guide

Crow Canyon Software

IT Help Desk & Facilities Management Programs

Getting Started Guide for Crow Canyon's IT Help Desk and Facilities Management Programs

Last updated: March 25, 2020

Programs: IT Help Desk, Facilities Management/Work Orders

Contents

Crow Canyon's support site includes a knowledge base, manuals, and tutorials at
http://www.crowcanyon.help. There is a wealth of information there, but please contact us
(sharepointsupport@crowcanyon.com) or submit a ticket if you do not get the answers you
need from that site.

The NITRO Studio manual is particularly useful as it describes what you can do with the
underlying apps in the program: https://www.crowcanyon.info/nitro/appmanual_v2/

To get up and running with the program, we recommend that you focus on these areas first:

Permissions

SharePoint has sites and lists. Our program is installed in one Site. If you use our Portal, that is
installed in another Site. You need to determine who (which users or groups) is going to have
access to which Site and the lists that are in it.

For end users

End Users will need the permission to create an item in the main Ticket list and read
permissions on the other lists. You can give them the Read permission on the Site
and the Create permission on the Ticket list. If you want them to Edit tickets after
they are submitted, they will need the Edit permission on the Ticket list. Please note
that this is true even if using the Portal.

If you are using the portal, the portal settings area has a Security Settings section to
block end user access to the back-end site. You can read more about portal security
settings here: https://www.crowcanyon.info/nitro/appmanual_v2/security-
settings.html

(Note: the IT Help Desk has a Tickets list as the main list whereas Facilities
Management/Work Orders has Work Orders as its main list)

For technicians and managers

They need access to the main program Site. You can use standard SharePoint
permissions for these individuals or groups. That is, you would give some Full
Control and others Design, Edit, or Contribute, as appropriate. You can also create
custom Site Permissions and use those. Again, these are the standard SharePoint
Site and List permissions and not anything specific to our program.

Categories and Issue Types

The program comes with cascading drop lists for Category and Issue Type. When you choose a Category, a filtered list of Issue Types shows up. This can be modified in many ways, with more levels of cascading and different names for the parent and child lists.

If you want to stick with the Category and Issue Type lists that come with the program, you can easily change what Categories and Issue Types are shown. These links will explain how to configure these lists:

Main Category: https://www.crowcanyon.help/article/171/ - Optional
Category: http://www.crowcanyon.info/sharepoint-manuals-37/category.html
Issue Type: http://www.crowcanyon.info/sharepoint-manuals-37/issue_type.html

Categories and Issue Types also allow for auto-routing of Tickets. You can use the Assigned Team and Category Owner features in the Category list. You can use the Assigned Staff and Round Robin Assignment features in the Issue Type list. You can read more about each of these options in the above links.

Notifications and Alerts

An important aspect of the program is determining who gets notified about what, when those notifications are sent, and what the notification says.

We have standard notifications for when a ticket is created, assigned, and closed.

Standard Notifications

i. Notification on Ticket Creation: http://www.crowcanyon.info/sharepoint-manuals-37/notification_on_new.html

ii. Notification on Ticket Assignment: http://www.crowcanyon.info/sharepoint-manuals-37/notification_on_ticket_assignment.html

iii. Notification on Ticket Closure: http://www.crowcanyon.info/sharepoint-manuals-37/notification_on_ticket_completion.html

iv. Notification to the end user when work log is updated https://www.crowcanyon.help/article/315/

Advanced Notifications using NITRO Workflow

Any kind of notification can be set up using the "Send Mail" action in the NITRO Workflow app that is part of NITRO Studio. With this tool, you can set up simple or complex alerts. The alerts can use specific Mail Templates with placeholders. They can include conditional alerting and be based on any column in the list or on a timer. A common one, for example, is notifying techs and managers when a ticket is overdue. This would be based on a certain amount of time before or after the Due

Date on the item and can be repeated any number of times. It can have different messages for the assigned tech and the managers, This, and other such alerts, are easily configured in the NITRO Workflow app. The manual for that is here: https://www.crowcanyon.info/nitro/appmanual_v2/workflow-manager.html

Notifications using the Advanced Email app

You can send email from the ticket using the "Crow Canyon Email" button on the item's ribbon. This is configured using the Advanced Email app in NITRO Studio.

This app gives you options on what the message will say and what attachments should be included. It also allows you to use templates so that you can easily respond to the end user with standard replies. See the manual here: https://www.crowcanyon.info/nitro/appmanual_v2/advanced-email.html

Email Manager

This is a way for your technicians to communicate with your requester through the ticket

See this article: https://www.crowcanyon.info/nitro/appmanual_v2/advanced-email.html

Email Sync

Only applies to O365. On-premises customers can set up incoming email in Central Administration on the SharePoint Server: https://docs.microsoft.com/en-us/sharepoint/administration/incoming-email-planning

Convert emails to tickets
https://www.crowcanyon.info/nitro/appmanual_v2/email-sync.html

Forms

The forms used in our program are highly flexible. The main Tickets list has a default form that you may want to change. You will want to determine what information you want to collect from the users and what should be displayed to users or technicians.

The NITRO forms have many features that make them quite powerful: dynamic and conditional columns or tabs, many layout options, custom actions, user info filler, cascaded lookups, external data columns, and associated tasks, along with more advanced features like custom JavaScript, custom CSS, and Form Events.

Crow Canyon will be glad to work with you on customizing your forms.

Forms in the Main Site

Info on customizing the NITRO forms is at this
link: https://www.crowcanyon.info/nitro/appmanual_v2/custom-forms.html

Portal Forms

If using the Portal, you will want to configure the portal forms and the Portal itself so
that it provides the best experience for the end
users: https://www.crowcanyon.info/nitro/appmanual_v2/portal-forms.html

Day-to-day Activities

There are many things that you will want to do day-to-day with the program. Below are some
common functions and how to do them.
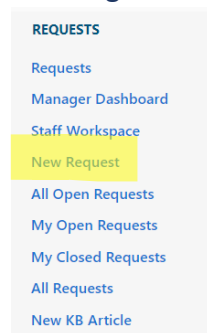
Working with Tickets

There are several activities that will be performed on each Ticket over the course of its life,
from creation to close.

Creating a Ticket

A Ticket can be created in one of three ways as shown below:

1. From Quick Launch 'New Ticket' link
2. From Employee Portal
3. From Email (Incoming Email)

Creating Ticket from Quick Launch

REQUESTS

Requests
Manager Dashboard
Staff Workspace
New Request
All Open Requests
My Open Requests
My Closed Requests
All Requests
New KB Article

Click on 'New Ticket' link and fill required information:

Creating Ticket from Employee Portal

Tickets can also be created from Employee Portal. End-Users can be direct to the Employee Portal automatically by configuring the portal settings. Reference this section in the NITRO manual (https://www.crowcanyon.info/nitro/appmanual_v2/power-portal.html) to set this up. From the backend site click on 'Employee Portal' on the Top Navigation as shown below

In 'Employee Portal' Home Page click on 'Submit New Ticket' as shown below

Create New Ticket with all the required information along with attachments (if any) as shown below

The logged in user will be able to see all of their tickets in the View My Tickets link.

To read more details about the Employee Portal, Click on this link:
https://www.crowcanyon.info/nitro/appmanual_v2/power-portal.html

Creating Ticket from Email
A Ticket can also be created from an email. The Crow Canyon solution includes an Email Sync App which allows you to sync an email to a SharePoint list. In our Service Request program, you will want to set this up to sync emails to the Email Tickets list within the Service Request site. Our program will either create a new Ticket in the Tickets list or associate the email with an existing Ticket. To set up the Email Sync App, refer to the Email Sync App:
https://www.crowcanyon.info/nitro/appmanual_v2/email-sync.html

For example, there is an email with subject 'User solution Resources Exhausted' added in 'Email Tickets' list which creates a new ticket in 'Tickets' list using email subject as title as shown below

Item in Email Tickets list

User Solutions Resources Exhausted	...	February 22	400	Incoming Email

Ticket created in Tickets List

✓	📎	Case Id	Title		Category	Issue Type	Requester	Created	Due Date	Priority	Request Status	Created By	Assigned Staff	Related Asset
		400	User Solutions Resources Exhausted	...				February 22		Normal	Unassigned	☐ SharePoint App		
		399	Your Office 365 Enterprise E3 is about to expire	...				February 20		Normal	Assigned	☐ SharePoint App	▪ Pavan Kumar	
		398	test12345	...				February 19		Normal	Unassigned	☐ SharePoint App		

Assigning a Ticket

To assign a Ticket manually to a staff member, open the Ticket in edit mode. A Ticket can be assigned to staff members using 'Assigned Staff' and 'Assigned Team' fields in Ticket list.

Employee	Staff	Knowledge Base	Related Items

Assigned Team	Enter a name or email address…
Request Status*	Unassigned ▼
Assigned Staff	Enter a name or email address…

As 'Assigned Staff' allows multiple selections, Ticket can be assigned to multiple staff members.

Another option for manual assignment is to use Custom Actions.

Click one of the buttons on the Ticket Ribbon in the view (display) form of the Ticket:
1. Self-Assign – Assigns the ticket to the current logged in user
2. Assign to someone – Opens a dialog box where you can select an individual or individuals to be assigned to the ticket
3. (Advanced) Create your own Custom Action – you can create your own Custom Action to assign the Ticket conditionally: https://www.crowcanyon.info/nitro/appmanual_v2/batch-actions.html

Auto- Assignment of Tickets

Tickets can be auto assigned to staff members by configuring Assigned Staff and Enabling

Round Robin functionality in 'Issue Type' and 'Category' list in the application admin home

screen.
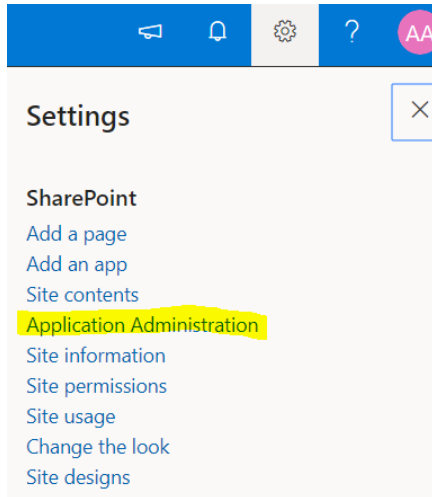
SLA's

1. For overdue tickets https://www.crowcanyon.help/article/288/
2. For Ticket Creation, Due Date https://www.crowcanyon.help/article/287/
3. Based on the Priority of The Ticket to Update Due Date and Configure Alerts
   https://www.crowcanyon.help/article/286/
4. Auto close tickets - https://www.crowcanyon.help/article/151/

Approvals

Though there are several options for setting up approvals in Crow Canyon, we recommend using a combination of Custom Actions and NITRO Workflows as described in this article:
https://www.crowcanyon.help/article/458/

For O365 customers, we have an Advanced Approvals app, however, one major drawback to this app is that you cannot set up "lazy approval" i.e. approval via email. To use lazy approval, please refer to the above article link. Below are the core components of the Advanced Approvals app and how to use them.

1. Advanced Approvals (O365 only)
   1. https://www.crowcanyon.info/nitro/appmanual_v2/advanced-approvals.html
   2. https://www.crowcanyon.info/nitro/appmanual_v2/configuring-approvals.html
   3. https://www.crowcanyon.info/nitro/appmanual_v2/approval-levels.html
   4. https://www.crowcanyon.info/nitro/appmanual_v2/configuring-mail-templates2.html

Dashboards

The program has two dashboards. Both are accessed by clicking the "Tickets" link in the Quick Launch menu. There is a "redirect.aspx" page that will read the SharePoint group of the logged in user. Users in the Owners group will be sent to the Manager workspace and users in the Members group will be sent to the Staff Workspace. If you need to change this or enable the redirect for additional groups, please contact sharepointsupport@crowcanyon.com

Manager Workspace

The Manager Workspace is a quick way for Managers to monitor staff work across the whole department.

- All overdue tickets

- My Assigned tickets

- Unassigned tickets

- User tasks

- Staff load

- Open tickets by category and priority

- Incoming tickets by month

- Closed tickets by month

All these elements are customizable web parts.

INCOMING TICKETS BY MONTH

CLOSED TICKETS BY MONTH
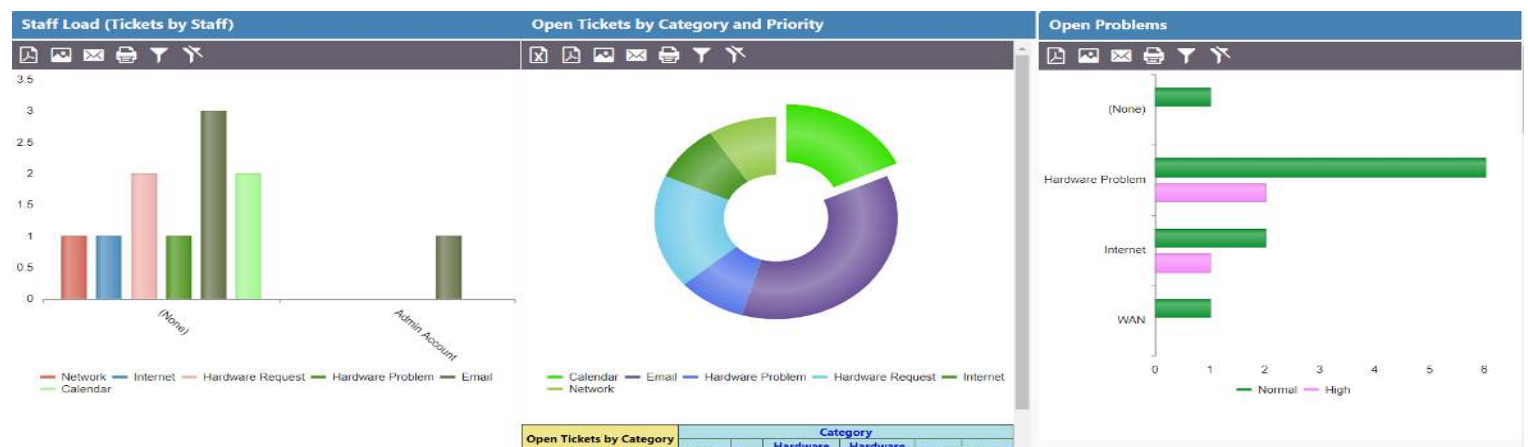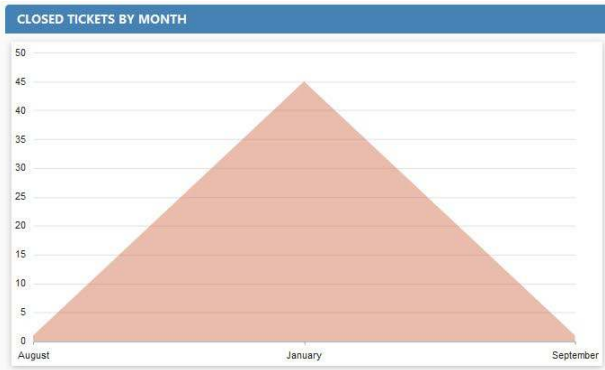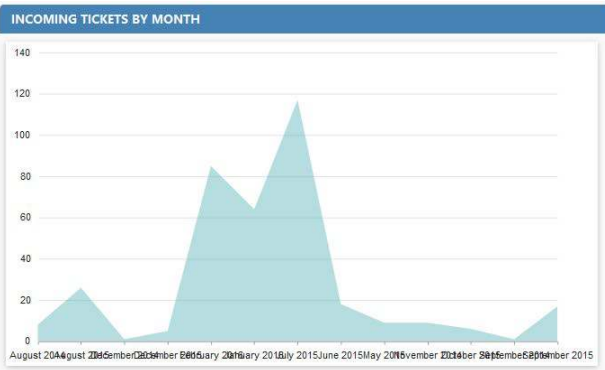
MY ASSIGNED TICKETS   + ✎

✓	Case Id	Title		Due Date	Category	Issue Type	Priority	Requester	Created
	349	Auto Assignment is not performed	⋯		Calendar	Calendar Delegation	Normal	☐ Pavan Kumar	February 5
	352	Issue with Email Tickets	⋯		Calendar	Calendar Delegation	Normal	☐ Pavan Kumar	February 5
	354	Telephone Connection Issue	⋯				Normal	☐ Pavan Kumar	February 5
	357	Priter Issue	⋯		Calendar	Calendar Delegation	Normal	☐ Pavan Kumar	February 7
	399	Your Office 365 Enterprise E3 is about to expire	⋯				Normal		5 days ago

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Staff Workspace

The Staff Workspace is a quick way for a staff member to see data assigned to him, including assigned tickets, unassigned tickets, assigned tasks, and open tickets by category, etc. All of these elements are customizable web parts.

Note: From here staff can Work on tickets and tasks which are assigned to them

Staff Workspace

MY TICKETS   + ✎

✓	📎	Case Id	Title		Category	Issue Type	Requester	Created	Due Date	Priority	Request Status	Created By	Assigned Staff	Related Asset
		349	Auto Assignment is not performed	⋯	Calendar	Calendar Delegation	☐ Pavan Kumar	February 5		Normal	Assigned	☐ Pavan Kumar	☐ Pavan Kumar	
		352	Issue with Email Tickets	⋯	Calendar	Calendar Delegation	☐ Pavan Kumar	February 5		Normal	Assigned	☐ Pavan Kumar	☐ Pavan Kumar	
		354	Telephone Connection Issue	⋯			☐ Pavan Kumar	February 5		Normal	Assigned	☐ SharePoint App	☐ Pavan Kumar	
		357	Priter Issue	⋯	Calendar	Calendar Delegation	☐ Pavan Kumar	February 7		Normal	Assigned	☐ Pavan Kumar	☐ Pavan Kumar	
		399	Your Office 365 Enterprise E3 is about to expire	⋯				5 days ago		Normal	Assigned	☐ SharePoint App	☐ Pavan Kumar	

1 - 5 ▸

MY TASKS

✓	Task Name		Due Date
	Check cable connections	⋯	
	Order a new monitor	⋯	
	Task Created by Action	⋯	March 20, 2015
	Task Created by Action	⋯	March 20, 2015
	Task Created by Action	⋯	March 20, 2015

1 - 5 ▸

MY OPEN TICKETS BY CATEGORY/PRIORITY
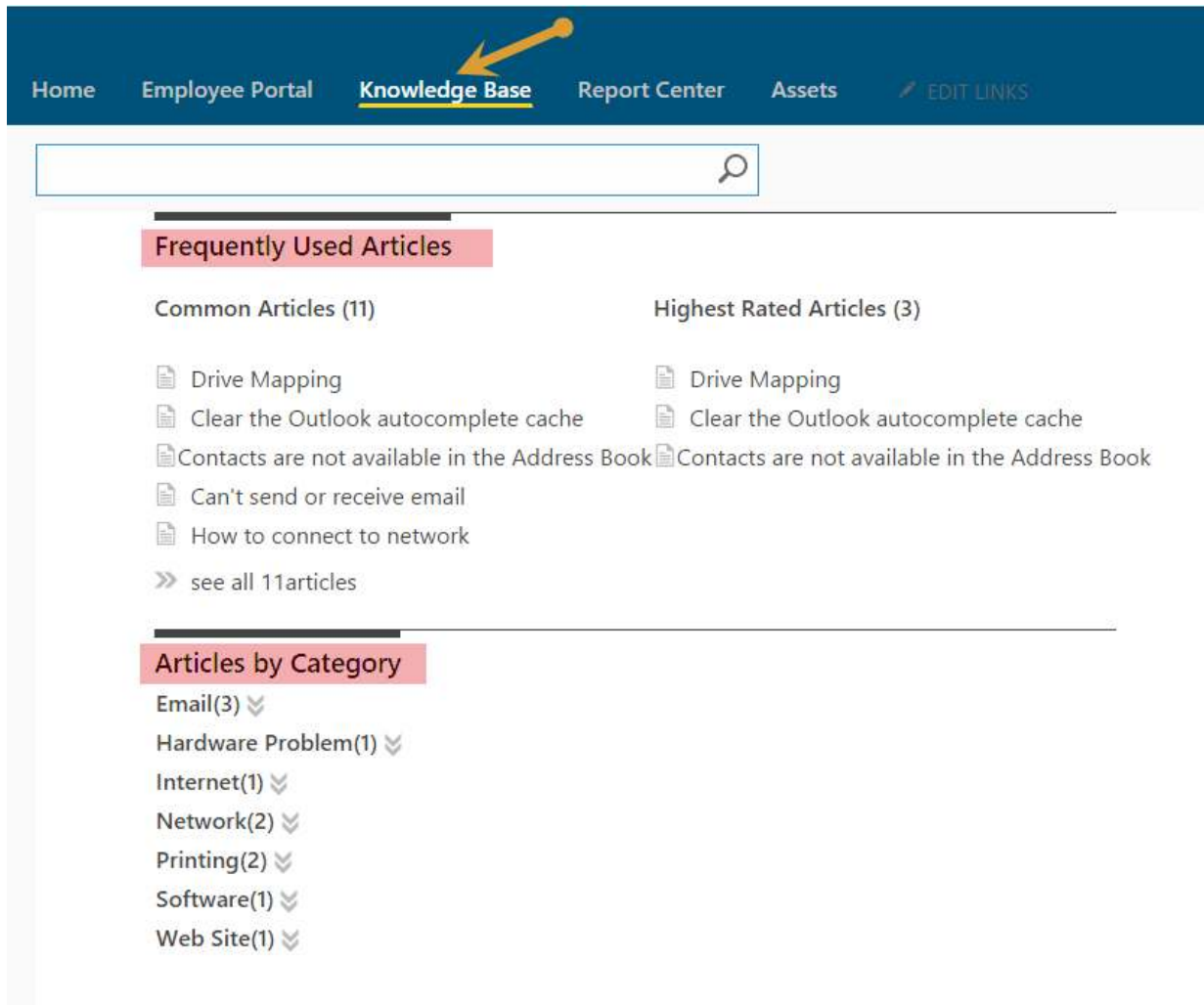
MY CLOSED TICKETS BY MONTH

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'Knowledge Base' is a quick way to search KB Articles which is configured as a top navigation link in the site as shown below


- You can search Articles directly by entering a Keyword, category, issue type or Title in the Search Box
- Frequently Used Articles
    - This Section is very useful for which are more popular
    - In this section we find two types
- Common type Articles
- Highest rated Articles
- Articles by Category
    - In this Section we find count of Articles under each category

Report Center

> Report Center is configured as a top navigation link which is to show all the reports configured in the site as shown below.
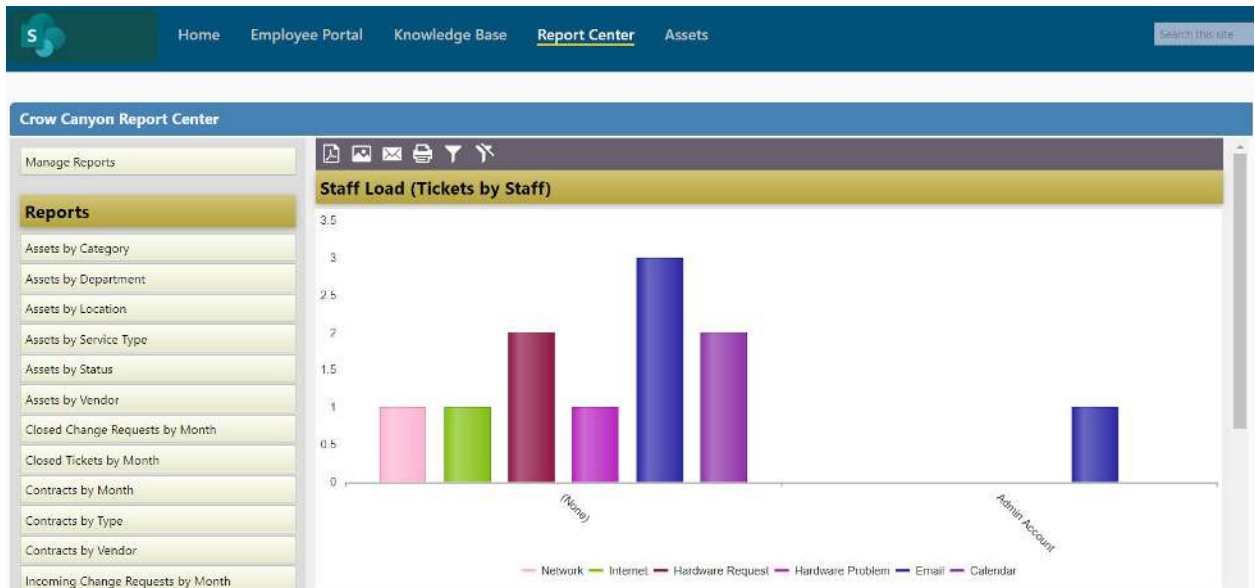
- Reports are configured in Dashboards to show progress of list items in the form of charts and Tables.
- To configure reports please refer to the NITRO manual: https://www.crowcanyon.info/nitro/appmanual_v2/report-center.html

Create KB Article
Quick Launch Link:

New KB Article can be created directly from Quick launch link under 'Tickets' heading 'New KB Article' as shown below.

Tickets List:

In Tickets list under 'Knowledge Base' tab there is an option 'Create KB Article' check that option to create KB article for the ticket when the ticket gets closed

Note: KB article gets created as a list item in 'Knowledge Base' list based on the mappings specified in 'Configuration' list. To know more details about KB mappings refer: **General Configuration** link in Application Administration workspace

Other topics of interest

Printing
Using NITRO's Print Manager: https://www.crowcanyon.info/nitro/appmanual_v2/print-manager.html

Portal

Using the NITRO Portal: https://www.crowcanyon.info/nitro/appmanual_v2/power-portal.html

    a. Portal Overview Video - https://www.youtube.com/watch?v=noznl8ZnlcA&list=PLqw_MwV_NgPj0eZSYkuDDuyQ08n2cnjUV&index=7
    b. https://www.youtube.com/watch?v=2PlccpbnftY&t=1603s
    c. https://www.crowcanyon.help/article-category/power-portal/

Formatting of Lists

Using NITRO's Conditional Formatting app:
https://www.crowcanyon.info/nitro/appmanual_v2/conditional-formatting.html

User Surveys

See these articles: https://www.crowcanyon.help/?s=survey

Setting up Recurring Tickets/Preventative Maintenance Work Orders

Using this article, you can set up Tickets/Work Orders to be created on a scheduled basis:
https://www.crowcanyon.help/article/363/

Custom Actions

    NITRO Custom Actions provide business process automation on demand. Custom Actions share many of the same data processing features as NITRO Workflows such as item creation and updates, sending emails, running scripts and web services, however custom actions are triggered manually by pressing a button in the Display Form, List View or selecting the action from an Edit Control Block, rather than automatically as they are in Workflows. Custom Action processes can be performed for a single item or multiple items, depending on how they are configured.

1. Configuring Custom Actions - https://www.crowcanyon.info/nitro/appmanual_v2/configuring-custom-actions.html
2. Custom Action Use Cases
    i. https://www.crowcanyon.info/nitro/appmanual_v2/use-case---close-tickets.html
    ii. https://www.crowcanyon.info/nitro/appmanual_v2/use-case---invoke-worflow-to-a.html
    iii. https://www.crowcanyon.info/nitro/appmanual_v2/use-case---link-items-using-cu.html

Full list of all out-of-the-box Ticket columns

You can find a detailed description of each of the out-of-the-box columns in the Tickets list from this link: https://www.crowcanyon.help/article/493/