

Request Manager for SharePoint Online

 **Crow Canyon** Software



Introduction

Reference guide for Crow Canyon Request Manager for SharePoint Online.

Permissions:

1. 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 (what users or groups) is going to have access to which Site and the lists that are in it.

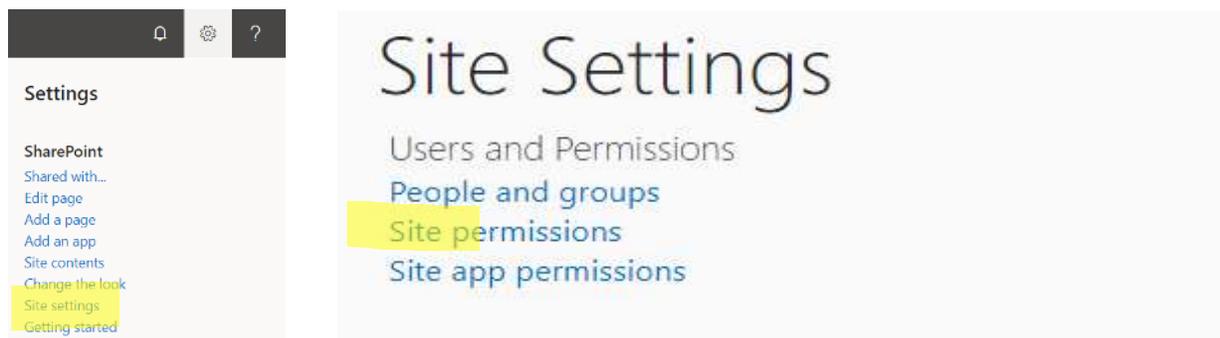
For end users: End Users will need the permission to create an item in the main Ticket list and read permissions on the other lists. You can give them the Read permission on the Site and the Create permission on the Ticket list. If you want them to Edit tickets after they are submitted, they will need 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, but other programs may have a different name for this main list, such as “Work Orders”, “Requests”, or “Purchase Requests”, as appropriate for that program.)

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.



Site Settings ▶ Permissions

 Some content on this site has different permissions from what you see here. [Show these items.](#)
There are limited access users on this site. Users may have limited access if an item or document under the site has been shared with them. [Show users.](#)
This Web site inherits permissions from its parent. (Crow Canyon NITRO Applications)

<input type="checkbox"/> Name	Type	Permission Levels
<input type="checkbox"/> Crow Canyon NITRO Applications Members	SharePoint Group	Contribute without delete
<input type="checkbox"/> Crow Canyon NITRO Applications Owners	SharePoint Group	Full Control
<input type="checkbox"/> Crow Canyon NITRO Applications Visitors	SharePoint Group	Read
<input type="checkbox"/> Excel Services Viewers	SharePoint Group	View Only

Working with Tickets

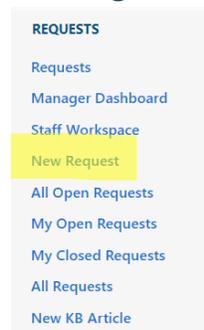
There are several activities that will be performed on each Ticket over the course of its life, from creation to close.

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



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

Tickets - New Item
✕

Save ✕ Cancel 📎 Attach File

Requester Details
^

Requester*

Requester Email

Requester Phone

Requester Department

Ticket Details
^

Title*

Priority

Category

Issue Type

Ticket Description
^

Description

(inherited font)
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Save
Cancel

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
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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

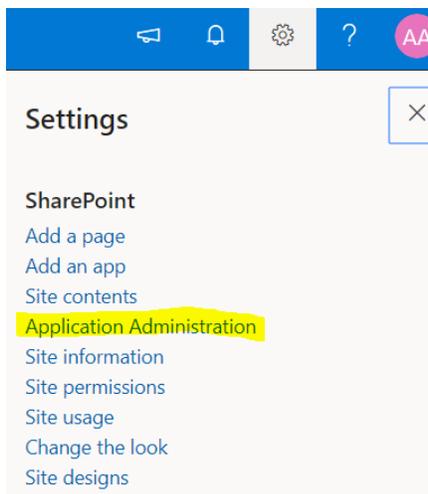
To assign a Ticket manually to a staff member, open the Ticket in edit mode. A Ticket can be assigned to staff members using 'Assigned Staff' and 'Assigned Team' fields in Ticket list.

Employee	Staff	Knowledge Base	Related Items
Assigned Team	<input type="text" value="Enter a name or email address..."/>		
Request Status*	<input type="text" value="Unassigned"/>		
Assigned Staff	<input type="text" value="Enter a name or email address..."/>		

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

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.



- Configure Lists
- Notifications
- Categorization
- General Configurations
- Change Request
- Configure Assets Lists
- Asset Types
- Service Catalog
- Crowd Canyon NITRO Apps

Setup Categories and IssueTypes

Change the Categories and linked Issue Types drop-down fields that appear in the ticket. First add or modify the Category list and then add Types in Issue Types list below.

Category					
+ New Item Print List Print List Settings					
<input type="checkbox"/>	Title	Priority	Category Owner	Assigned Team	
<input type="checkbox"/>	Calendar	Any			
<input type="checkbox"/>	Email	Any			
<input type="checkbox"/>	Hardware Request	Any			
<input type="checkbox"/>	Hardware Problem	Any			
<input type="checkbox"/>	Internet	Any			

Page 1 of 3 5 items per page 1 - 5 of 12 items

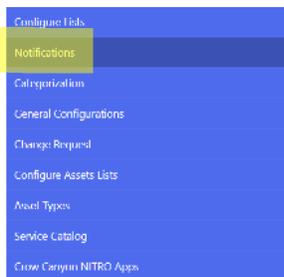
Issue Type					
+ New Item Print List Print List Settings					
<input type="checkbox"/>	Title	Category	Template	Assigned Staff	Enable Round Robin Assign...
<input type="checkbox"/>	Calendar Delegation	Calendar			No
<input type="checkbox"/>	Can't book room	Calendar			No
<input type="checkbox"/>	Can't book resource	Calendar			No
<input type="checkbox"/>	Time Zones	Calendar			No
<input type="checkbox"/>	Meeting Setup	Calendar			No

Create a new Category by clicking on the plus sign in the upper left of the Category list (see above screen shot).

Title -- Category name

Category Owner – A Person or Group who will be notified when a new ticket matches both the Category and Priority settings on this Category form. This field can be left blank so that new ticket notification is not based on Category. This works in conjunction with the [New Ticket Notification utility](#) described in Notifications below. That utility is used to set up the new ticket notification for every new ticket. The Category Owner is used to set notifications by Category.

Assigned Team – A group who will be notified of the new ticket. Populates the Assigned Team field on the ticket. The Assigned Team will get updates on the ticket, such as the Notification on Ticket Assignment, and Notification on Ticket completion. The ticket remains unassigned until the Assigned Staff field is populated.

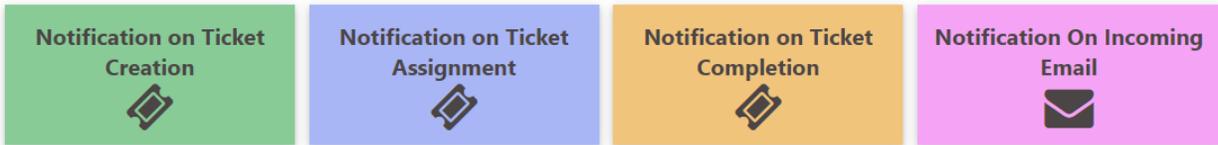


Crow Canyon Service Request application sends email notifications during the processing of Tickets. Below are the predefined notifications:

- When a new Ticket is created in the system, Ticket creator and staff can be notified. This is for Tickets created via Email, Portal or directly in application
- When Ticket is assigned to a staff
- When user sends an email about an existing Ticket
- When Ticket is completed

These notifications are configured in below lists. For each stage, you can specify who all should be notified and what should be the content of the email. Email content can contain HTML and Ticket information can be included by using column placeholders with format <>.

Note: If you need notifications for stages other than these predefined ones, use Crow Canyon Workflow Manager app.



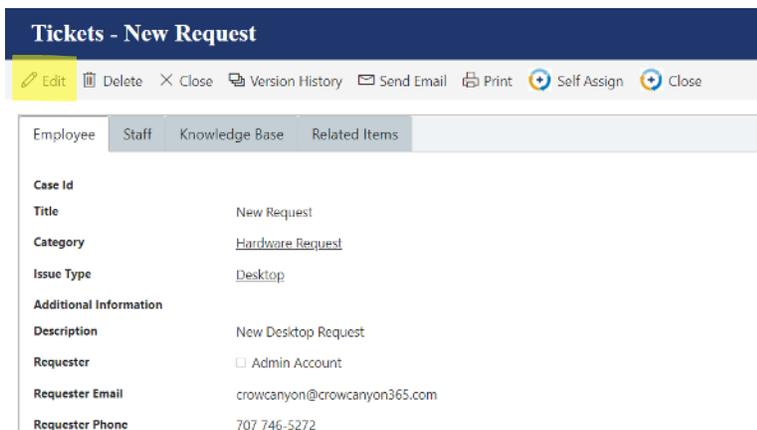
Modify Tickets

Ticket can be modified by using one of these following options:

1. Open Ticket (Display mode)
2. Tickets list view 'Items' ribbon bar
3. Drop-down menu accessed from Ticket title

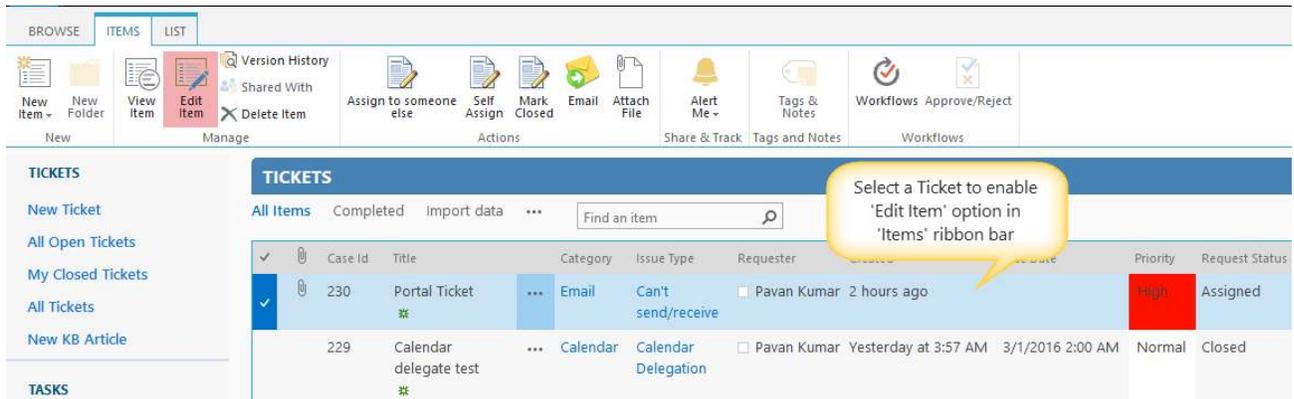
Open Ticket (Display mode):

You can edit ticket by opening it in display mode and select 'Edit Item' on the top left corner as shown below



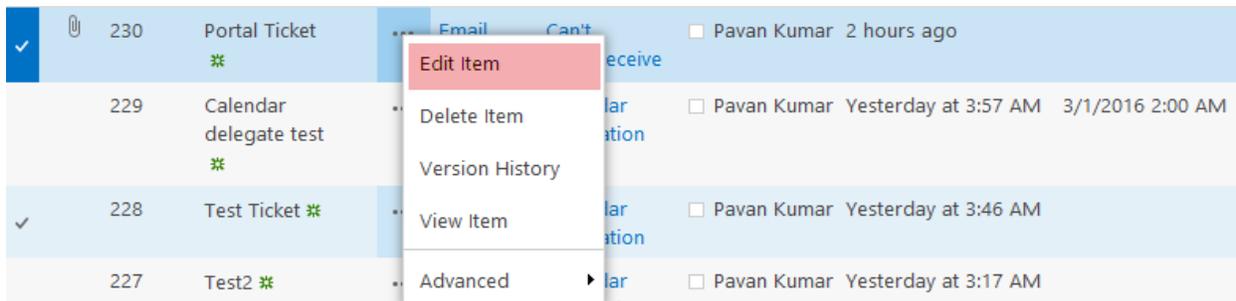
Tickets list view 'Items' ribbon bar:

Ticket can be edited from the list view 'Items' ribbon bar on selecting a ticket as shown below



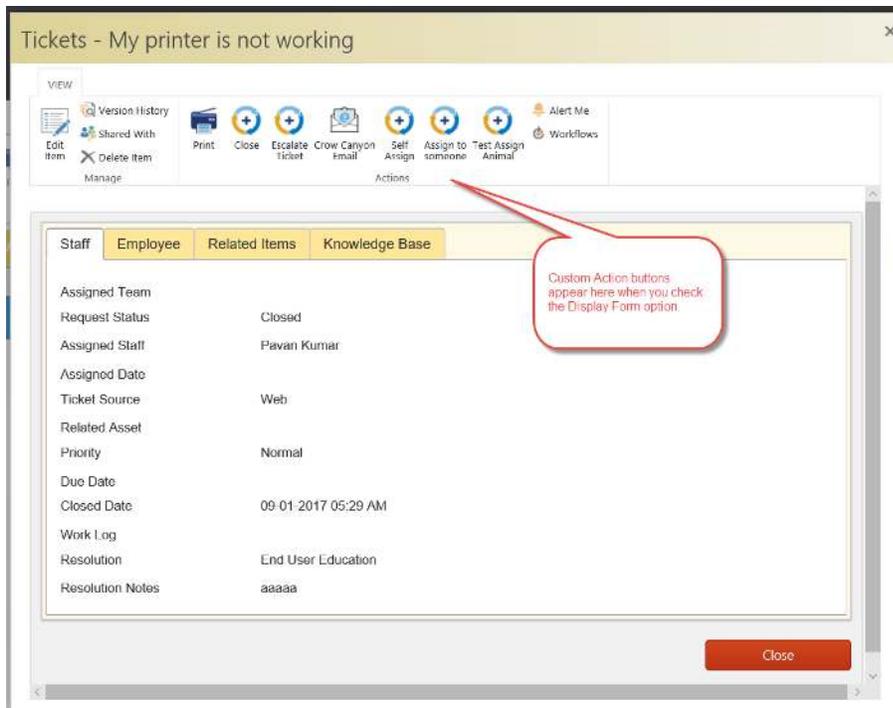
Drop-down menu accessed from Ticket title:

Ticket can be edited from the drop down accessed from ticket list item title as shown below



Custom Action Ticket Assignment

- Custom actions allow you to quickly assign and close tickets.



Close Ticket

You can close a Ticket by using one of the following options:

1. Custom Action
2. Request Status

➤ Request Status:

Ticket can also be closed by setting 'Request Status' field to 'Closed'

Emailing Tickets

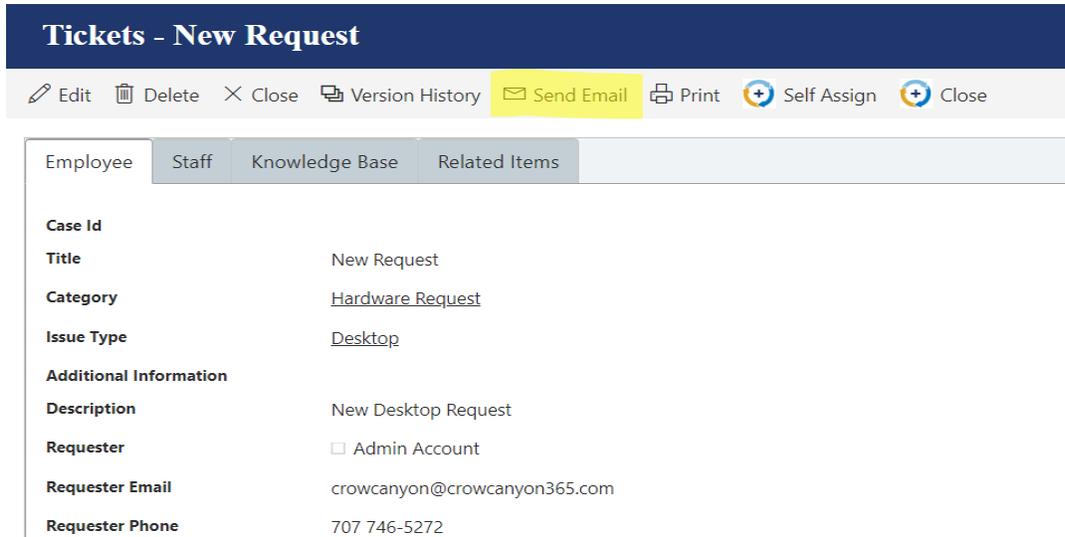
You can email a ticket to anyone who may want to see it. You can use this feature as 'For Your information' for someone who does not want to have continuous notifications about the ticket, or for someone who misplaced a notification email.

You can send email from one of these following options:

1. Open Ticket in Display mode
2. 'Items' ribbon bar from within the list view of Tickets

Open Ticket in Display Mode:

You can send email from the 'Email' option in ribbon of a ticket opened in display mode as shown using Crow Canyon's Email Manager: https://www.crowcanyon.info/nitro/appmanual_v2/advanced-email.html



The screenshot shows a web interface for a ticket system. At the top, a dark blue header reads "Tickets - New Request". Below this is a ribbon with several action buttons: "Edit", "Delete", "Close", "Version History", "Send Email" (highlighted in yellow), "Print", "Self Assign", and another "Close". Below the ribbon is a tabbed interface with "Employee", "Staff", "Knowledge Base", and "Related Items" tabs. The "Staff" tab is active, displaying a table of ticket details.

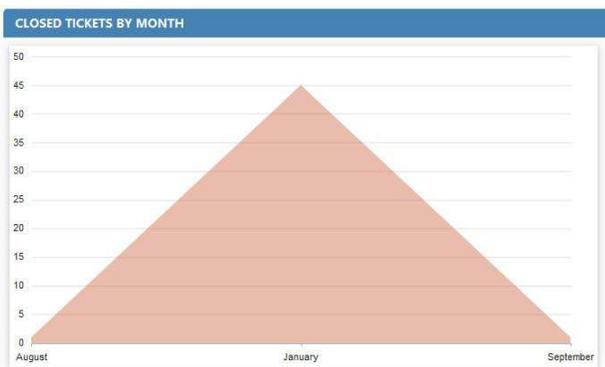
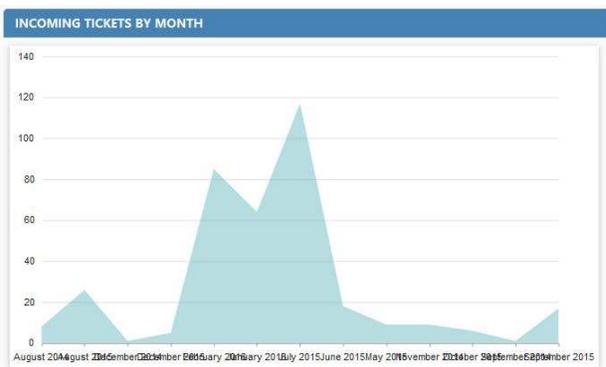
Employee	Staff	Knowledge Base	Related Items
Case Id			
Title	New Request		
Category	Hardware Request		
Issue Type	Desktop		
Additional Information			
Description	New Desktop Request		
Requester	<input type="checkbox"/> Admin Account		
Requester Email	crowcanyon@crowcanyon365.com		
Requester Phone	707 746-5272		

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.



MY ASSIGNED TICKETS

Case Id	Title	Due Date	Category	Issue Type	Priority	Requester	Created
349	Auto Assignment is not performed	...	Calendar	Calendar Delegation	Normal	<input type="checkbox"/> Pavan Kumar	February 5
352	Issue with Email Tickets	...	Calendar	Calendar Delegation	Normal	<input type="checkbox"/> Pavan Kumar	February 5
354	Telephone Connection Issue	...	Calendar	Calendar Delegation	Normal	<input type="checkbox"/> Pavan Kumar	February 5
357	Printer Issue	...	Calendar	Calendar Delegation	Normal	<input type="checkbox"/> Pavan Kumar	February 7
399	Your Office 365 Enterprise E3 is about to expire	...	Calendar	Calendar Delegation	Normal	<input type="checkbox"/> Pavan Kumar	5 days ago

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	Printer 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	

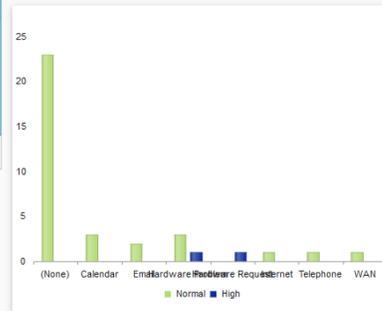
1 - 5

MY TASKS

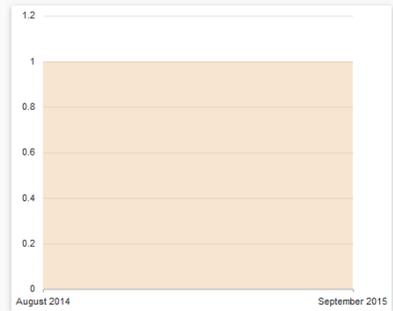
Task Name	Due Date
Check cable connections	...
Order a new monitor	...
Task Created by Action	March 20, 2015
Task Created by Action	March 20, 2015
Task Created by Action	March 20, 2015

1 - 5

MY OPEN TICKETS BY CATEGORY/PRIORITY



MY CLOSED TICKETS BY MONTH



Knowledge Base

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

Home Employee Portal **Knowledge Base** Report Center Assets EDIT LINKS

Search

Frequently Used Articles

Common Articles (11)	Highest Rated Articles (3)
Drive Mapping	Drive Mapping
Clear the Outlook autocomplete cache	Clear the Outlook autocomplete cache
Contacts are not available in the Address Book	Contacts are not available in the Address Book
Can't send or receive email	
How to connect to network	
» see all 11 articles	

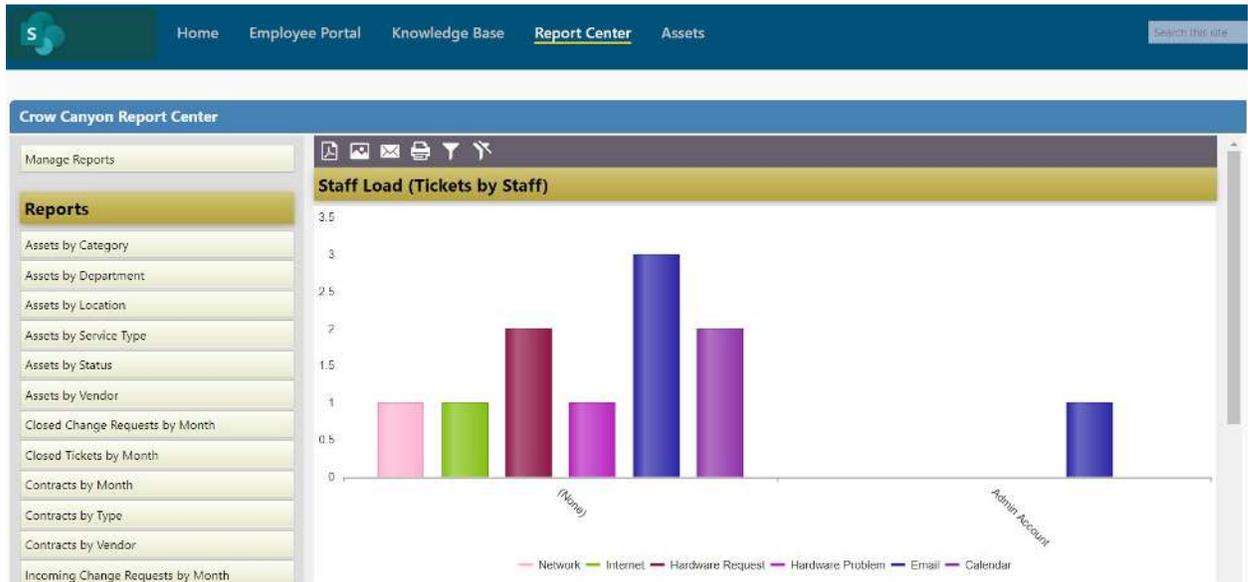
Articles by Category

- Email(3) ▾
- Hardware Problem(1) ▾
- Internet(1) ▾
- Network(2) ▾
- Printing(2) ▾
- Software(1) ▾
- Web Site(1) ▾

- 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

The screenshot shows a 'KB Information' form with the following fields and controls:

- Title***: A text input field.
- Category**: A dropdown menu currently showing '(None)'.
- Issue Type**: A dropdown menu currently showing '(None)'.
- Wiki Content**: A rich text editor with a toolbar containing options for font style (B, I, U), font size, text color, background color, link, unlink, list, and table. Below the toolbar is a large text area for content.
- Target Audience**: A dropdown menu.
- Resolution**: A dropdown menu.
- Resolution Notes**: A text input field.

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

Create 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>