

IT Premium: Change & Problem Management User Guide

Supplement to the IT User Guide

 **Crow Canyon** Software

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Supplement to the IT user guide

Working with Problems

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

Creating a Problem

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

1. From Quick Launch 'New Problem' link
2. Using the 'Custom Action' feature on the display item in the ticket

PROBLEMS

Problems

New Problem

All Open Problems

My Resolved Problems

All Problems

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

The screenshot shows a 'New Form' window with two panes: 'General' and 'Advanced'. The 'General' pane includes fields for 'Title', 'Category', 'Issue Type', 'Description', and 'Priority'. The 'Advanced' pane includes fields for 'Original Ticket', 'Assigned Team', 'Assigned Staff', 'Associated Tasks', 'Work Log', and 'Affected Components'. Each text area has a rich text editor toolbar above it.

Creating Problem from Child Ticket

Click on the 'Create Problem' custom action and fill out the form seen above

Tickets - IT Help Desk

The screenshot shows the 'VIEW' ribbon with the following options: Edit Item, Shared With, Delete Item, Manage; Version History; Crow Canyon Email; Close; Self Assign; Print; Create Problem; Create Change Request; Assign to someone; Alert Me; Workflows. Below the ribbon, there are tabs for Employee, Staff, Knowledge Base, and Related Items. The 'Staff' tab is selected, showing a list of tickets with the following details:

Case Id	207
Title	IT Help Desk

Assigning a Problem

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

The screenshot shows the 'Assigned Staff' field in the problem list. It includes a checkbox for 'Admin Account' and a table with the following columns: Actions, Task Name, Assigned To, Due Date, and a refresh icon. Below the table is a '+ New Item' button.

Notification on Problem Creation

Please refer to our NITRO manual for the 'send email' action in our workflow tool.

https://www.crowcanyon.info/nitro/appmanual_v2/workflow-actions.html

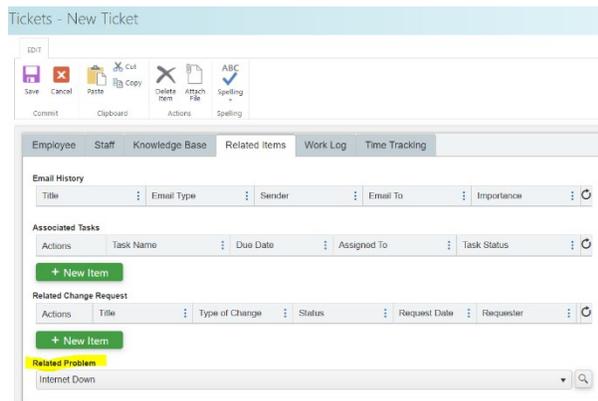
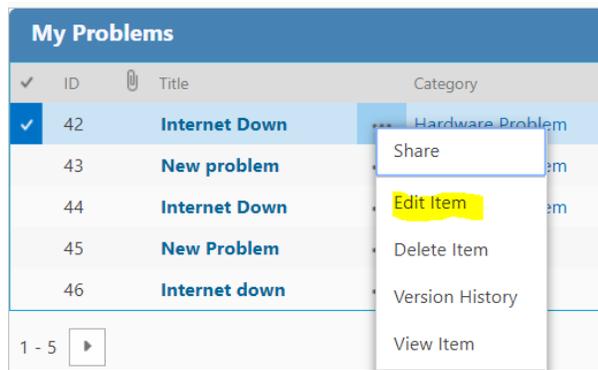
Modify Problems

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

1. Open Problem (Display mode)
2. Problems list view 'Items' ribbon bar
3. Drop-down menu accessed from Problem title
4. From the child Ticket in the Tickets List

The screenshot shows the 'VIEW' ribbon with the following options: Edit Item, Shared With, Delete Item, Manage; Version History; Print; Alert Me; Workflows. Below the ribbon, there are tabs for General and Advanced. The 'Advanced' tab is selected, showing a list of problems with the following details:

Title	Internet Down
Category	Hardware Problem



Staff Workspace

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

Staff Workspace

My Problems

ID	Title	Category	Issue Type	Priority	Assigned Team	Status	Assigned Staff	Due Date
42	Internet Down	Hardware Problem	Printer	Normal		Not Started	<input type="checkbox"/> Admin Account	
43	New problem	Hardware Problem	Printer	Normal		Not Started	<input type="checkbox"/> Admin Account	
44	Internet Down	Hardware Problem	Printer	Normal		Not Started	<input type="checkbox"/> Admin Account	
45	New Problem			Normal		Not Started	<input type="checkbox"/> Admin Account	
46	Internet down	Internet	Web Site Down	Normal	<input type="checkbox"/> Crow Canyon NITRO Applications Members	Not Started	<input type="checkbox"/> Admin Account	

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My Tasks

Task Name	Due Date
Can't login	October 23, 2018

My Open Problems by Category/Priority

Category	Count
(None)	1
Hardware Problem	4

My Resolved Problems by Month

Month	Count
0.0	0
1.0	1
1.2	2

Working with Change Requests

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

Creating a Change Request

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

1. From Quick Launch 'New Change Request' link
2. Using the 'Custom Action' feature on the display item in the ticket

CHANGE REQUESTS

- Change Requests
- New Change Request**
- All Open Change Requests
- My Closed Change Requests
- All Change Requests

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

Change Requests - New Item

EDIT

Save Cancel Paste Copy Attach File Spelling

Commit Clipboard Actions Spelling

General Details Related Items

Title*

Type of Change (None)

Owner Enter a name or email address...

Submit For Approval

Description

(inherited font) (inherited size) B I U abc

Format

Click on 'Create Change Request' custom action in display version of Ticket:

Tickets - New Ticket

VIEW

Version History Shared With Delete Item Manage

Crow Canyon Email Close Self Assign Print Create Problem Create Change Request Assign to someone Alert Me Workflows

Employee Staff Knowledge Base Related Items

Assigning a Change Request

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

General Details Related Items

Title*

Type of Change (None)

Owner Enter a name or email address...

Submit For Approval

Notification on Change Request Creation

Please refer to our NITRO manual for the 'send email' action in our workflow tool.

https://www.crowcanyon.info/nitro/appmanual_v2/workflow-actions.html

Approval Process for Change Request Creation

Please refer to this video for setting up an Approval Process for the change request list:

<https://youtu.be/mgttHJgKXbo>

Modify Change Request

Change Request can be modified by using one of these following options:

1. Open Change Request (Display mode)
2. Change Request list view 'Items' ribbon bar
3. Drop-down menu accessed from Change Request title
4. From the child Ticket in the Tickets List

The screenshot displays the ServiceNow interface for Change Requests. The top section shows the 'Change Requests - Calendar CR Ticket' header and a ribbon bar with options like 'Edit Item', 'Delete Item', 'Print', and 'Workflows'. Below this, the 'General' tab is active, showing details for the 'Calendar CR Ticket', including its title, type of change ('Pavan as Approver'), and owner ('Pavan Kumar').

The middle section shows the 'My Change Requests' list view. The ribbon bar includes options like 'New Item', 'Edit Item', 'Delete Item', 'Print', 'Attach File', 'Alert Me', 'Tags & Notes', 'Workflows', and 'Approve/Reject'. The list contains the following items:

Title	Related Ticket ID	Status	Request Date	Requester
Calendar CR Ticket	...	In Review	11/20/2017	Admin Account
WAN site CR	...	In Progress	11/21/2017	

The bottom section shows a close-up of the 'My Change Requests' list with a context menu open over the 'Calendar CR Ticket' row. The menu options are: Share, Edit Item (highlighted in yellow), Delete Item, Version History, and View Item.

Employee Staff Knowledge Base Related Items

Email History

Title	Email Type	Sender	Email To	Importance

Associated Tasks

Actions	Task Name	Due Date	Assigned To	Task Status

+ New Item

Time Tracking

Actions	Title	Related Ticket ID	Technician	Type of Work	Start Time

+ New Item

Related Change Request

Actions	Title	Type of Change	Status	Request Date	Requester
	New Change Request		In Review	03-25-2020	

Staff Workspace

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

Staff Workspace

My Change Requests

✓	Title	Related Ticket ID	Status	Request Date	Requester	Due Date	Approver	Owner	Priority	Risk Level
✓	Calendar CR Ticket	...	In Review	11/20/2017	Admin Account			Pavan Kumar	Normal	Normal
	WAN site CR	...	In Progress	11/21/2017					Normal	Normal
	Telephonic CR	...	In Review	1/15/2018				CrowCanyon Email	Normal	Normal
	Replace NIC Card	...	In Review	5/20/2018				Admin Account	High	Normal
	Overdue Task - Resolve ASAP	...	In Review	6/10/2018					Normal	Normal

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My Tasks	My Open Change Requests by Category/Priority	My Closed Change Requests by Month																
<table border="1"> <thead> <tr> <th>Task Name</th> <th>Due Date</th> </tr> </thead> <tbody> <tr> <td>Calendar CR Ticket</td> <td>December 12, 2017</td> </tr> <tr> <td>WAN site CR</td> <td>December 25, 2017</td> </tr> </tbody> </table>	Task Name	Due Date	Calendar CR Ticket	December 12, 2017	WAN site CR	December 25, 2017	<table border="1"> <thead> <tr> <th>Category</th> <th>Count</th> </tr> </thead> <tbody> <tr> <td>Hardware Change</td> <td>1</td> </tr> </tbody> </table>	Category	Count	Hardware Change	1	<table border="1"> <thead> <tr> <th>Month</th> <th>Count</th> </tr> </thead> <tbody> <tr> <td>12</td> <td>1</td> </tr> <tr> <td>1</td> <td>1</td> </tr> </tbody> </table>	Month	Count	12	1	1	1
Task Name	Due Date																	
Calendar CR Ticket	December 12, 2017																	
WAN site CR	December 25, 2017																	
Category	Count																	
Hardware Change	1																	
Month	Count																	
12	1																	
1	1																	