IT Premium:
Change & Problem Management User Guide

Supplement to the IT User Guide

Crow Canyon Software

Contents

Supplement to the IT user guide

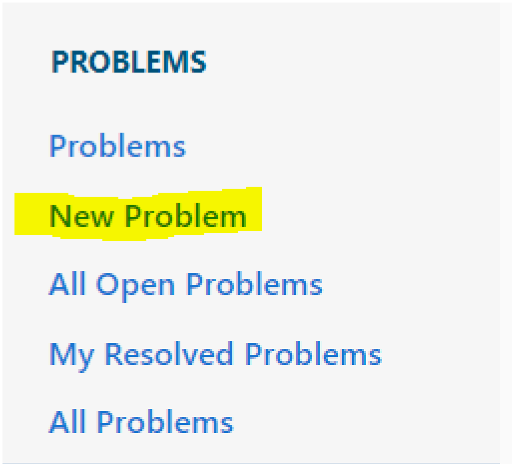
Working with Problems

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

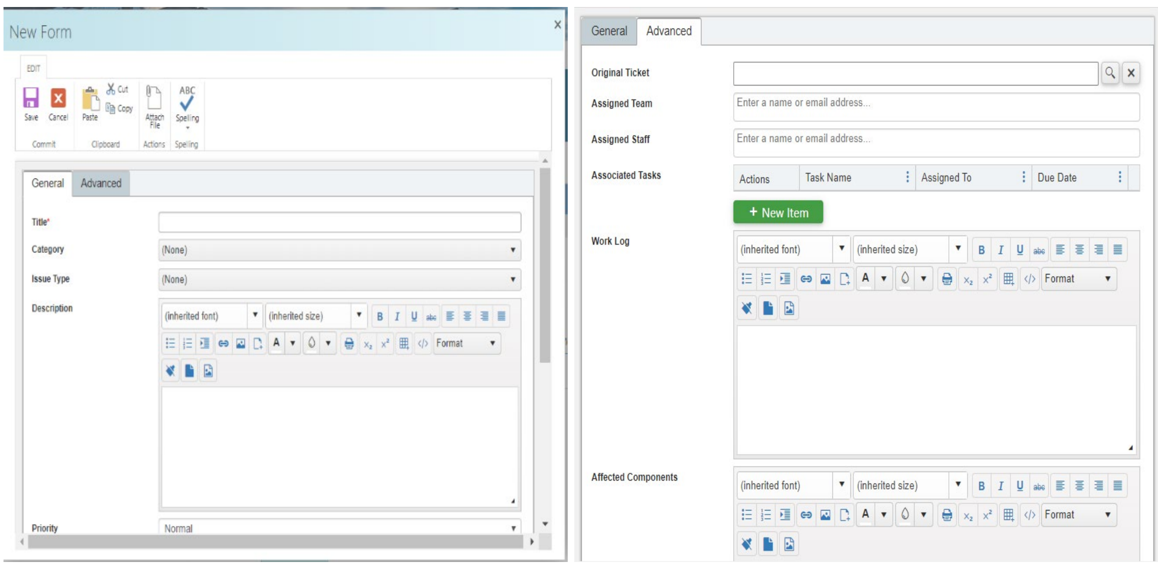
Creating a Problem

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

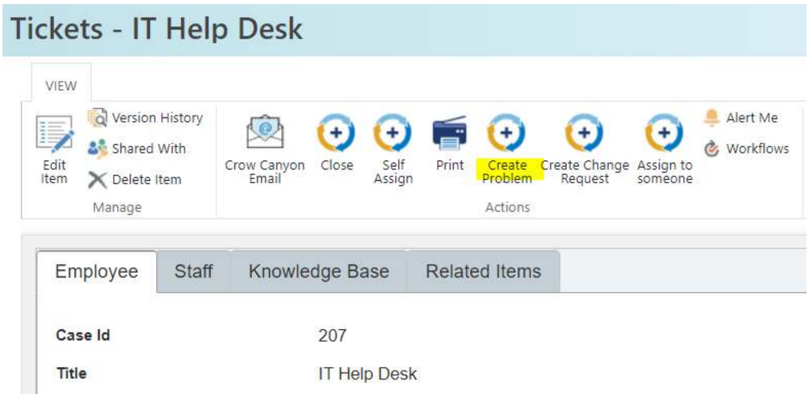


Click on ‘New Problem’ link and fill required information:



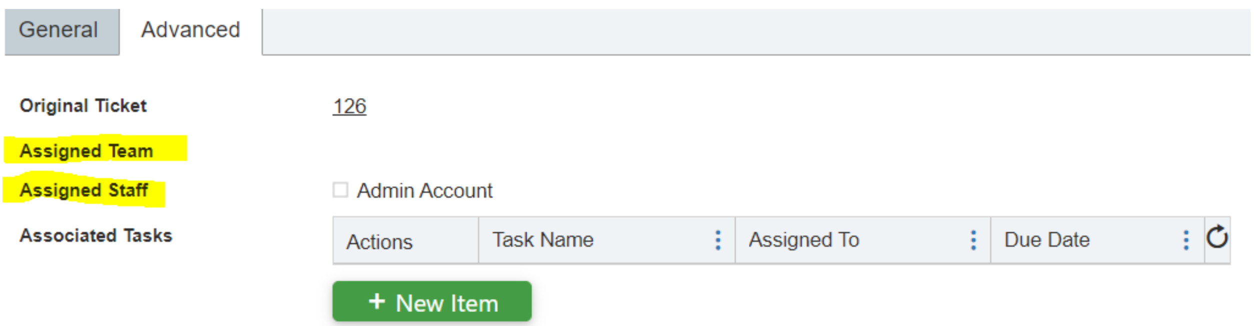
Creating Problem from Child Ticket

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



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.



Notification on Problem Creation

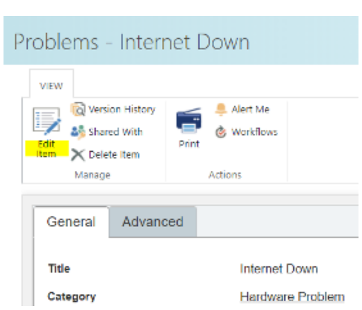
Please refer to our NITRO manual for the 'send email' action in our workflow tool.

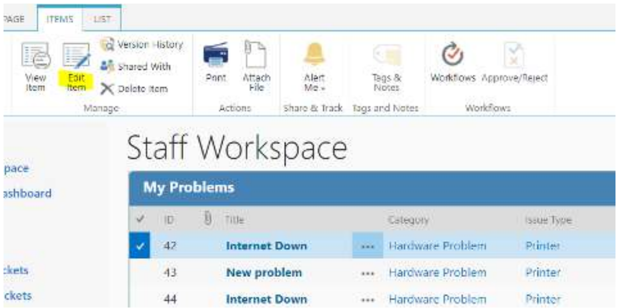
https://www.crowcanyon.info/nitro/appmanual_v2/workflow-actions.html

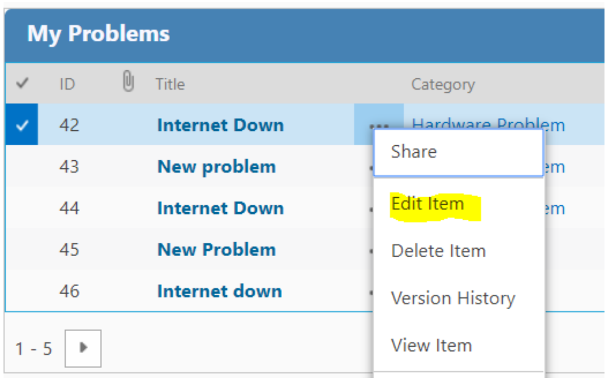
Modify Problems

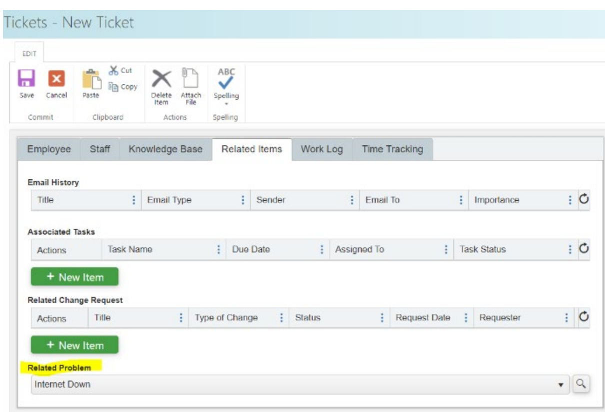
Problems can be modified by using one of these following options:

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



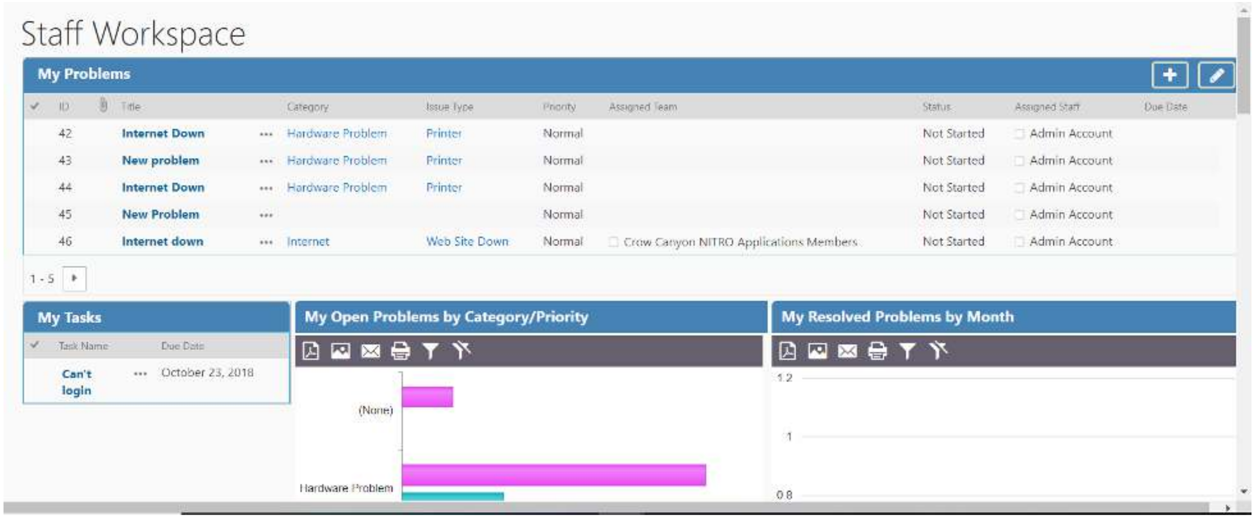






Staff Workspace

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.



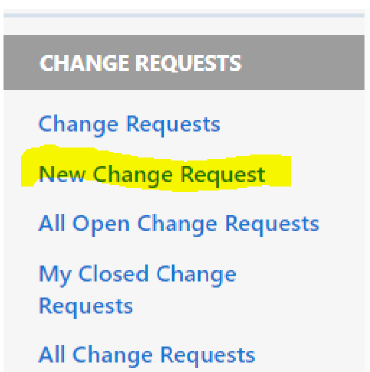
Working with Change Requests

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

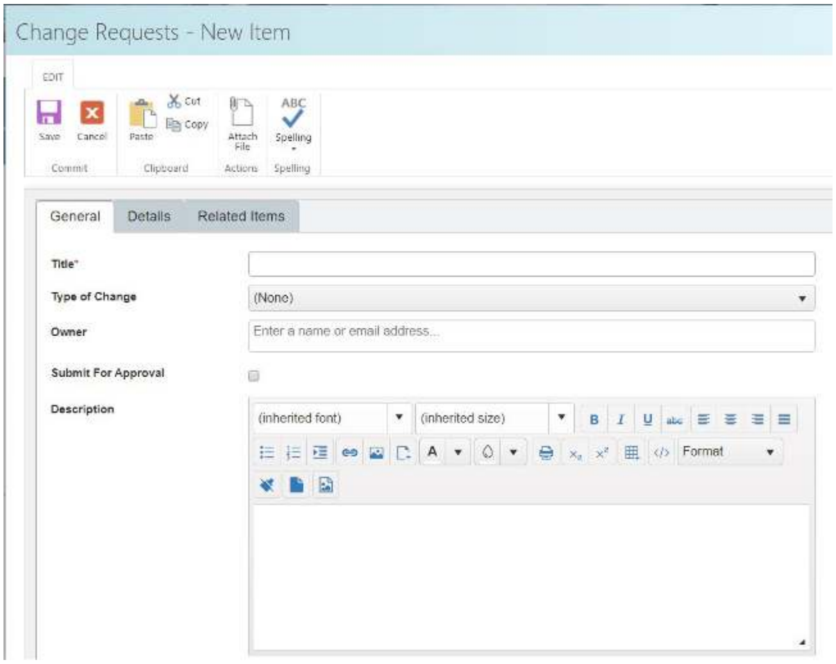
Creating a Change Request

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

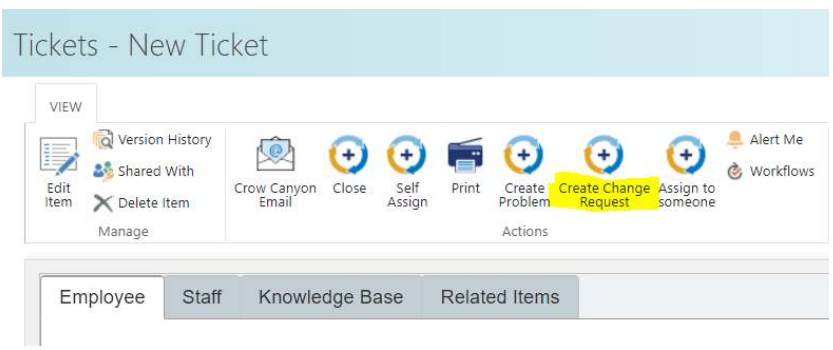
1. From Quick Launch 'New Change Request' link
2. Using the 'Custom Action' feature on the display item in the ticket



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

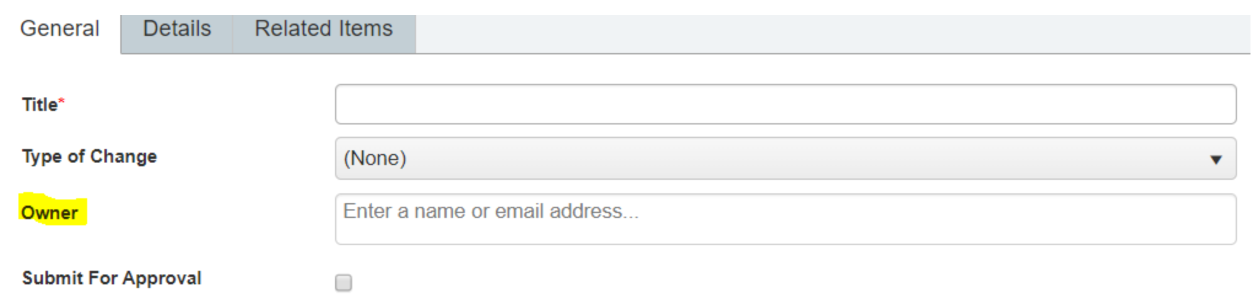


Click on ‘Create Change Request’ custom action in display version of Ticket:



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.



Notification on Change Request Creation

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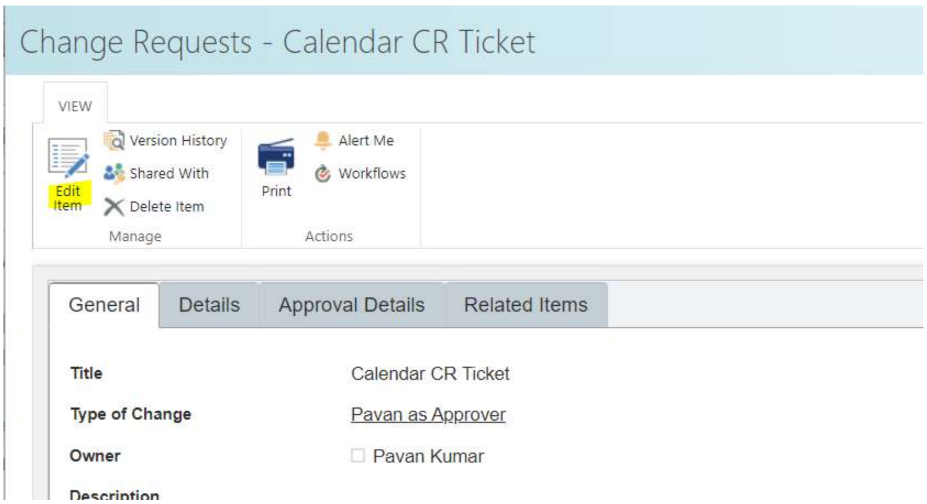
Approval Process for Change Request Creation

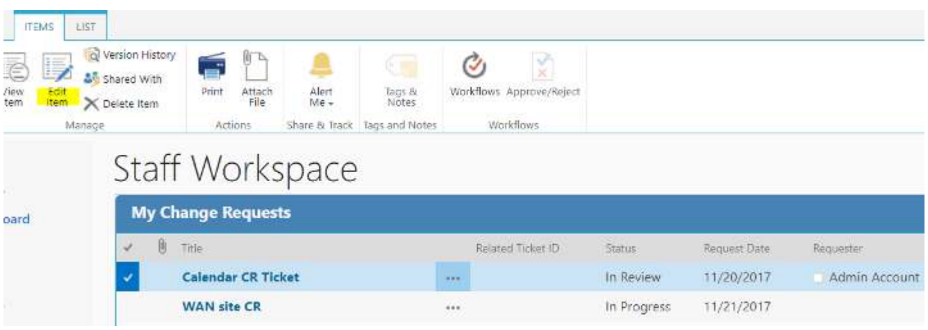
Please refer to this video for setting up an Approval Process for the change request list: https://youtu.be/mgttHJgKXbo

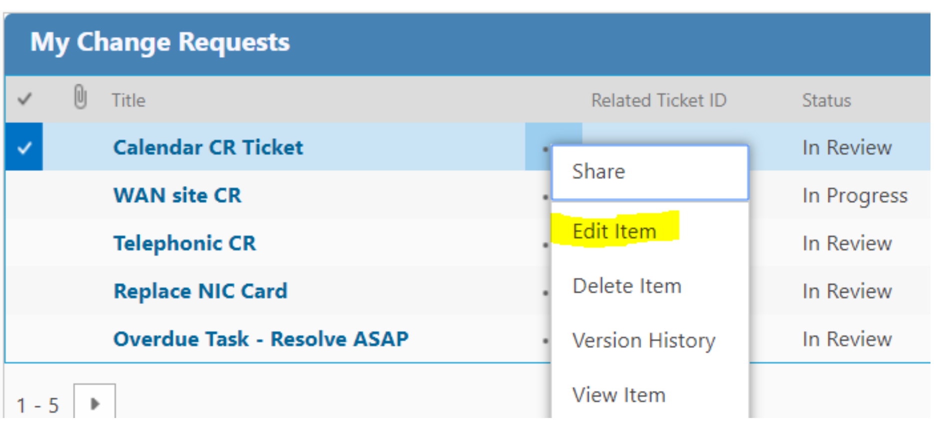
Modify Change Request

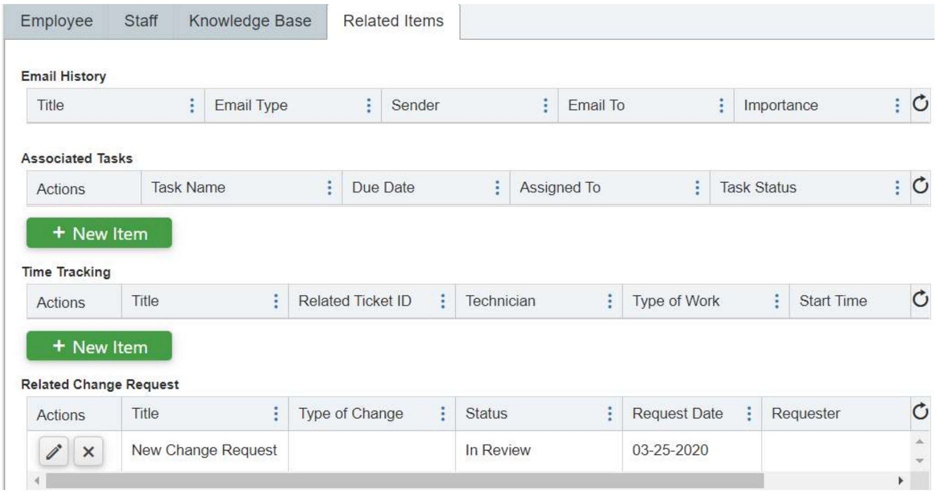
Change Request can be modified by using one of these following options:

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









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