NITRO Help Desk Manual

NITRO Help Desk: Administrator Guide

NITRO Help Desk: Administrator

Administrators are the users who can configure the application. This includes defining the approval levels and approvers, form configurations, permissions etc. They can be specified in a SharePoint group with full control permissions on the application site. Or they can be the Site Collection administrators. These users can access “Application Administration” page to configure the application.

Administrator Guide Steps for NITRO Help Desk Application

Administrators can do all tasks that a manager can do. Like a Manager, Administrators have access to below pages:

1. Ticket-Manager-Dashboard
2. Problem-Manager-Dashboard
3. CR-Manager-Dashboard

See the NITRO Help Desk manual -> Manager Guide section for more information

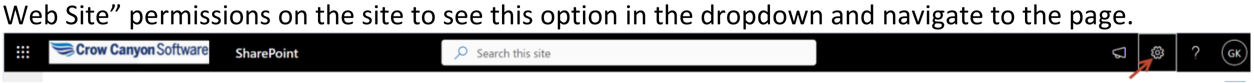
Apart from these pages, Administrators also have access to ‘Application Administration’ where several elements of the program can be modified.

Application Administration

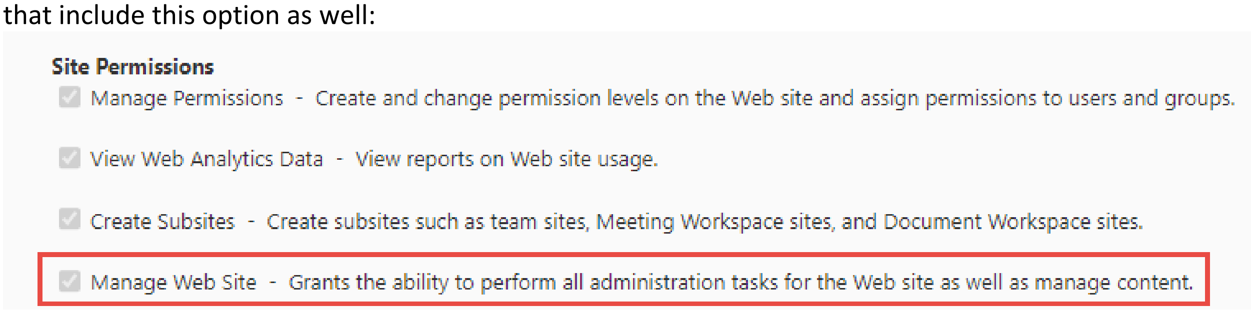
Application Administration workspace provides easy access to configure the NITRO Help Desk application.

Accessing the Application Administration workspace page

The Application Administration page is accessed by clicking the settings icon on the top right side of the page and selecting Application Administration from the dropdown. Users need to have at least “Manage Web Site” permissions on the site to see this option in the dropdown and navigate to the page.

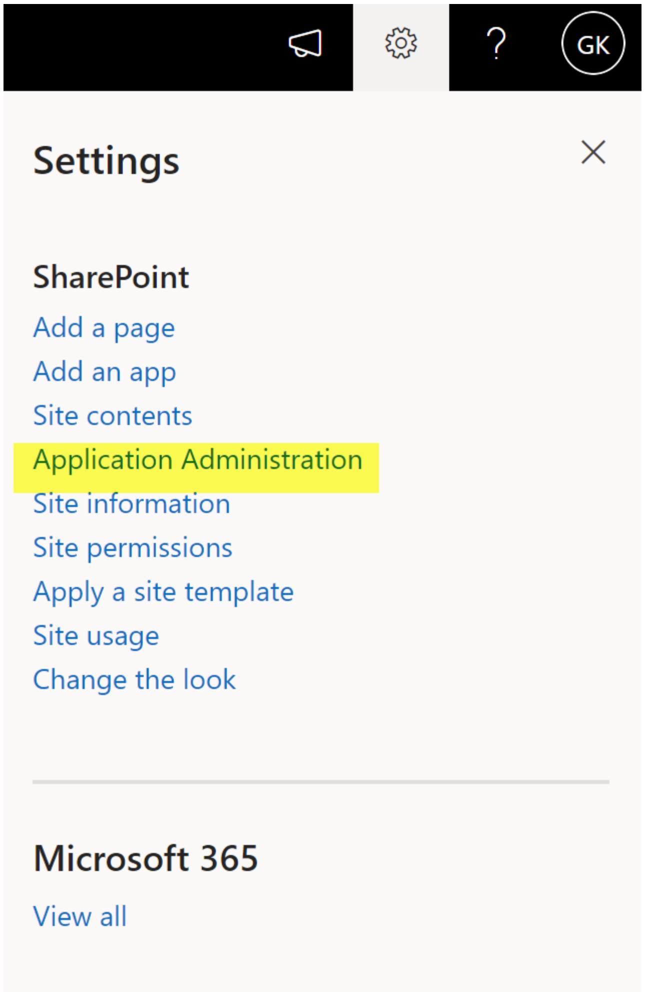


To grant “Manage Web Site” permission level, go to root site collection →Site Settings → Site Permissions → Click Permission Levels in the ribbon → Edit the required permission level → Select “Manage Web Site” permission under Site Permissions section and save the permission level. By default, the Full Control permission level includes this option. You can create additional custom permission levels that include this option as well:

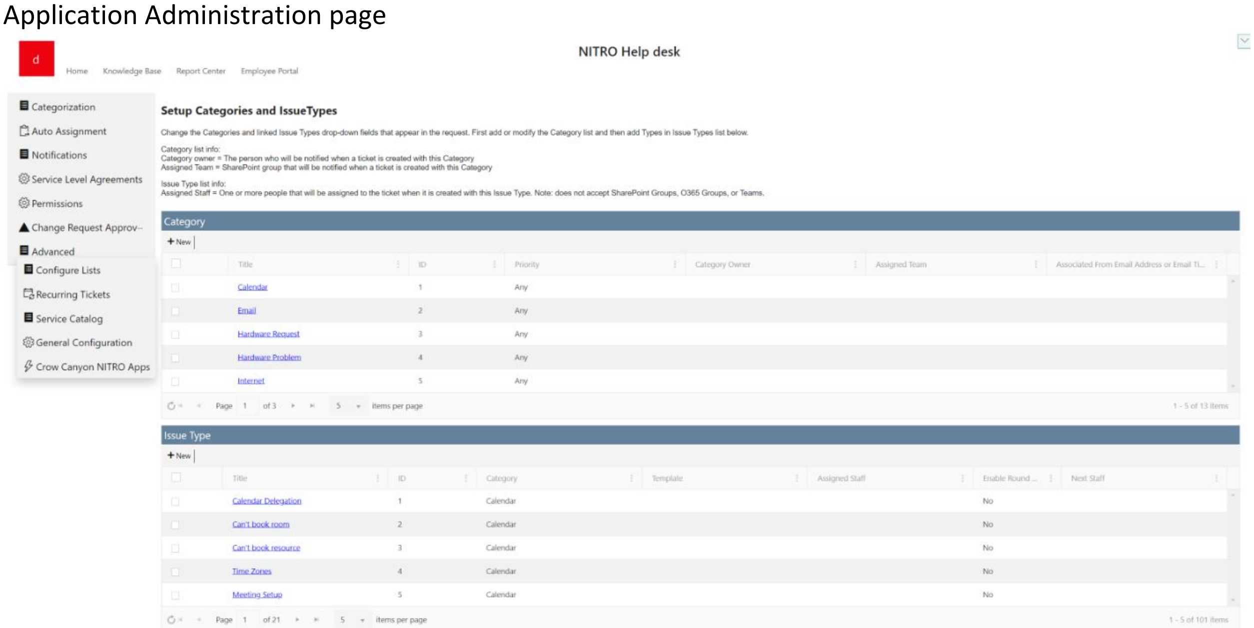


For more details regarding permissions levels, please refer this article.

Click ‘Application Administration’ in the settings as shown below:



Application Administration page



This workspace page allows Administrators to configure the following:

1. Categorization
2. Auto Assignment
3. Notifications
4. Service Level Agreement
5. Permissions
6. Change Request Approvers
7. Advanced
   - Configure Lists
   - Recurring Tickets
   - Service Catalog
   - General Configuration
   - Crow Canyon NITRO Apps

Categorization

Setup Categories and Issue Types

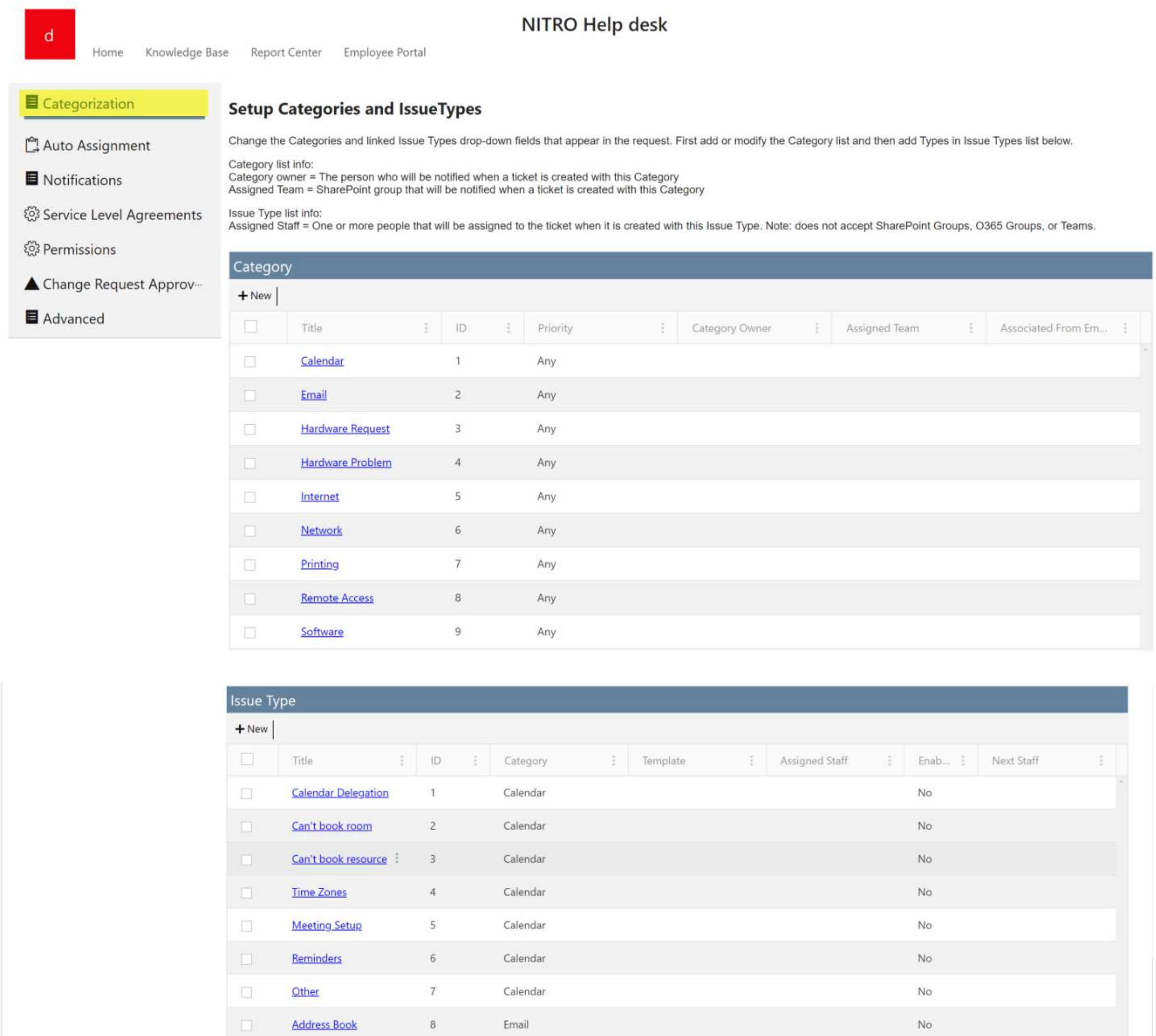
Administrator can change the Categories and linked Issue Types drop-down fields that appear in the request. First add or modify the Category list and then add Types in Issue Types list below.

<u>Category list:</u>

- Category owner – The person that gets notified when a Ticket is created with this Category
- Assigned Team – SharePoint group that will be notified when a Ticket is created with this Category. This group will also be placed in the Assigned Team field on the ticket. *Note: This does not change the ticket's status to 'Assigned'. It will remain 'Unassigned' until the Assigned Staff field is filled out either by an automated process or manually.*

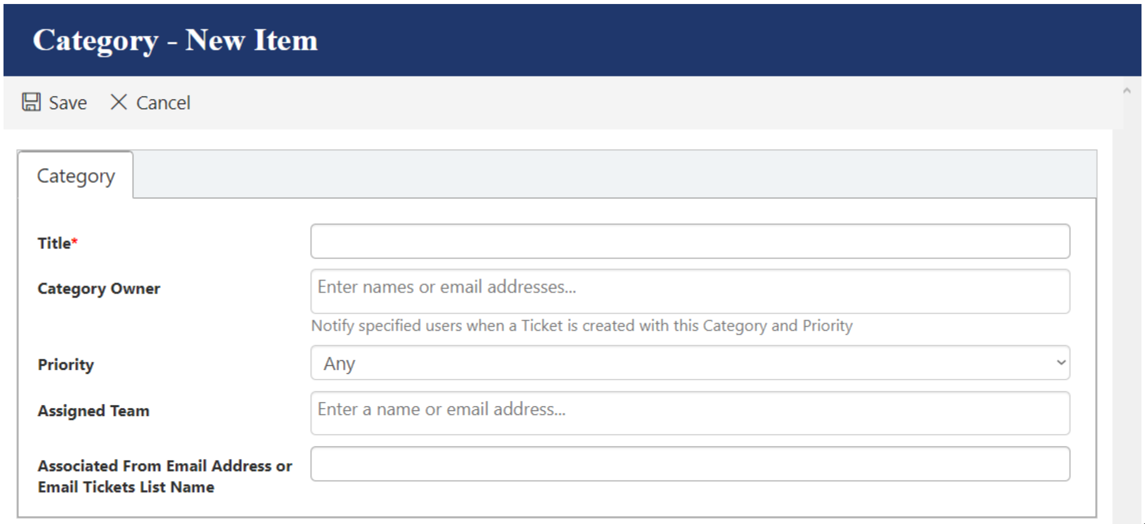
<u>Issue Type list:</u>

- Assigned Staff – One or more people that will be assigned to the Ticket when it is created with this Issue Type.



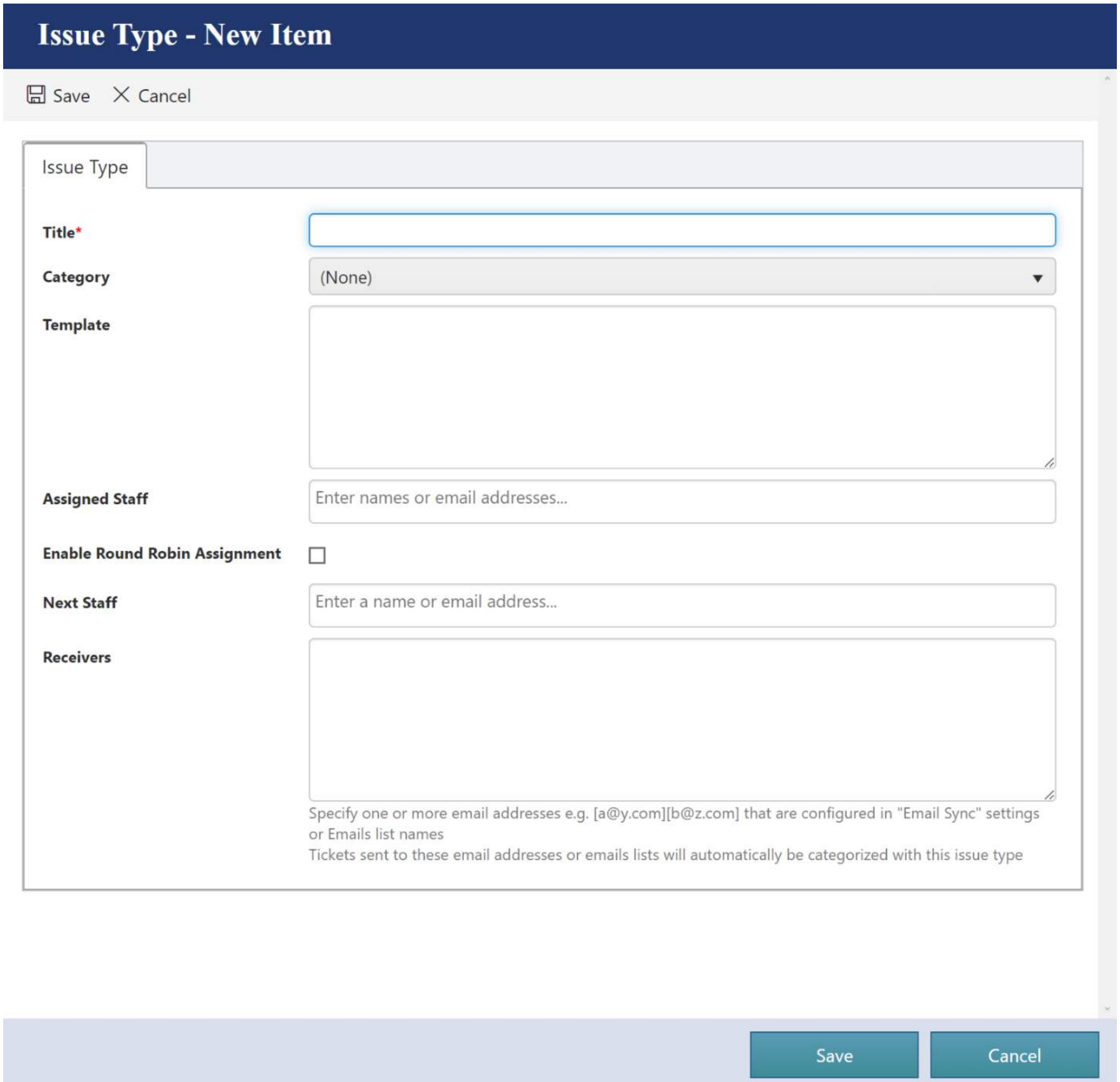
Administrator can:

- Create a new Category by clicking the 'New' button available in upper left corner of Category.
- Can edit the Category by clicking item in Category and then 'Edit' button
- Can delete the Category by clicking 'delete' button available in item ribbon
  - Use caution when deleting Categories as this will impact any tickets that have been created with this Category



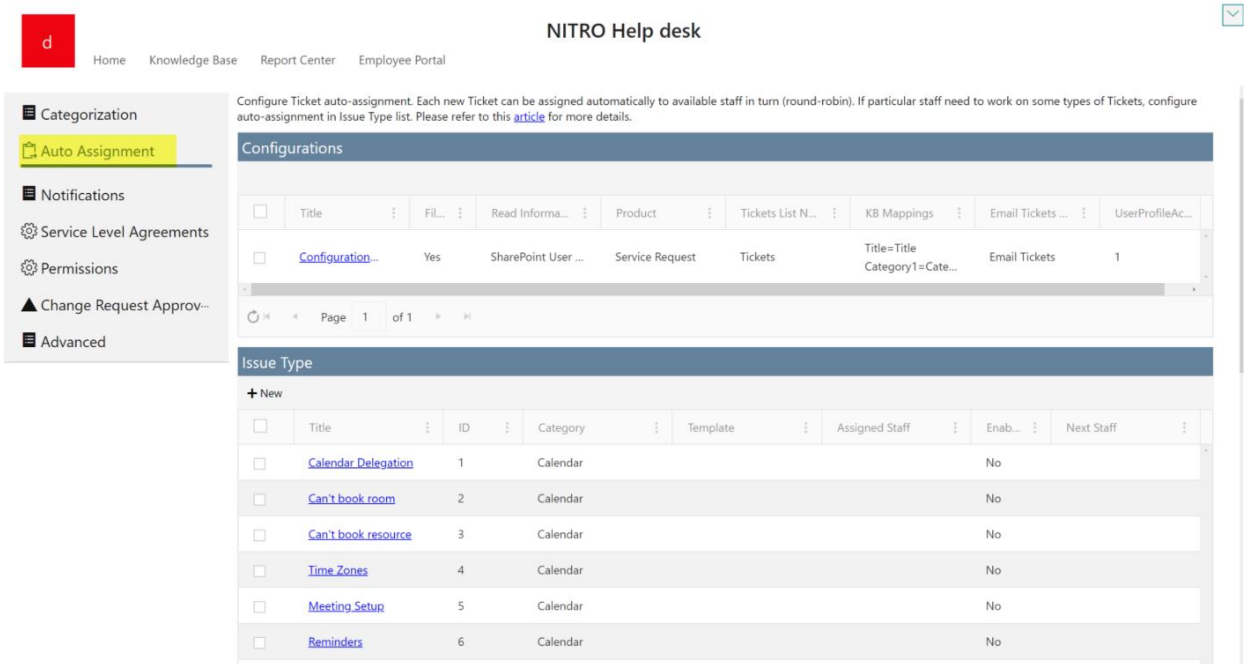
Administrator can:

- Create new Issue Type by clicking 'New' button available in upper left corner of Issue Type
- Edit the Issue Type by clicking item in Issue Type list and then 'Edit' button.
- Delete the Issue Type by clicking 'delete' button available in item ribbon.
  - Use caution when deleting Issue Types as this will impact any tickets that have been created with this Issue Type



Auto Assignment

Administrator can configure Ticket auto-assignment.
For Auto Assignment
Go to Application Administration → Auto Assignment tab



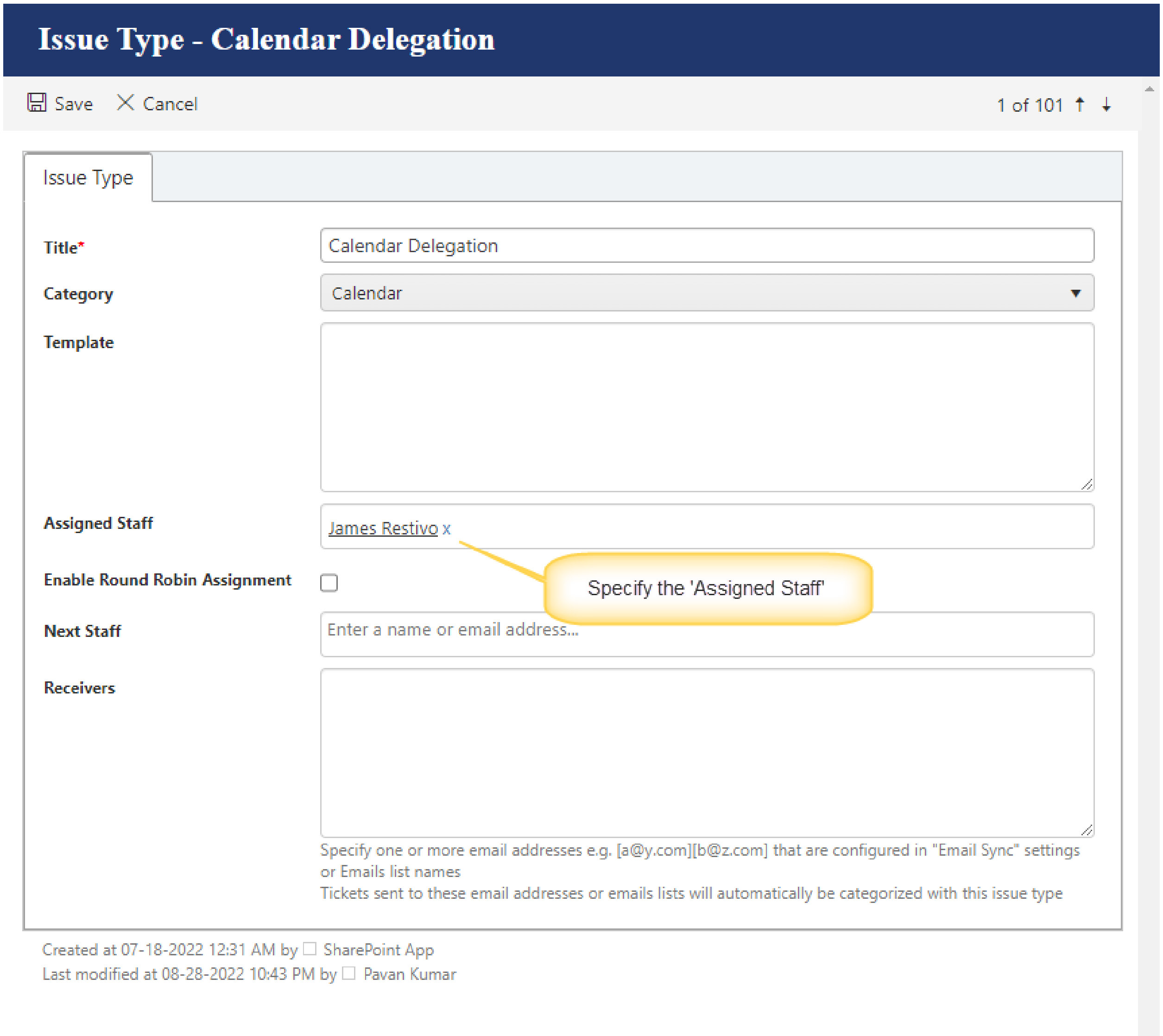
In NITRO Help Desk application, auto assignment can be applied in below ways:

1. Auto assignment based on categorization
2. General auto assignment based on round robin staff

Auto assignment based on categorization

In this feature, Ticket will be auto assigned to staff based on the selected Category and Issue Type in the Ticket. If selected Issue Type has 'Assigned Staff' then 'Assigned Staff' will be auto filled in the Ticket. You can add more than one user to Assigned Staff, and all of them will become the Assigned Staff of the ticket. You can also enable Round Robin assignment when entering multiple users.

To enable this feature, specify the staff in Issue Type.
Go to Application Administration → Auto Assignment tab → Edit Issue Type and specify the 'Assigned Staff'.



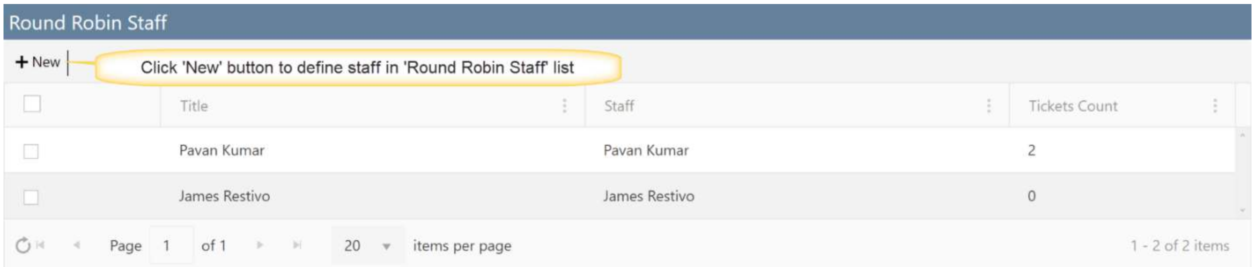
General auto assignment based on round robin staff

In some cases, if we would like to auto assign Tickets by default even without selecting the Category and Issue Type then we can use general auto assignment feature.
In this feature, each new Ticket will be assigned automatically to available staff in ‘Round Robin Staff’ list.

To enable the general round robin assignment,

1. Define staff in ‘Round Robin Staff’ list

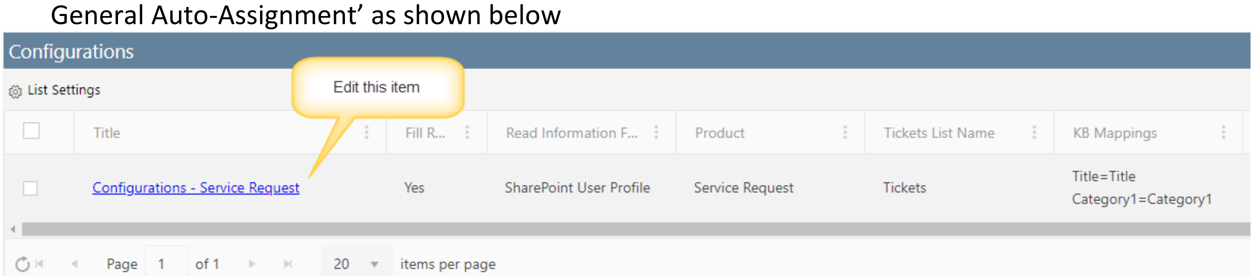
Go to Application Administration → Auto Assignment → Click New button to define staff in ‘Round Robin Staff’ list.

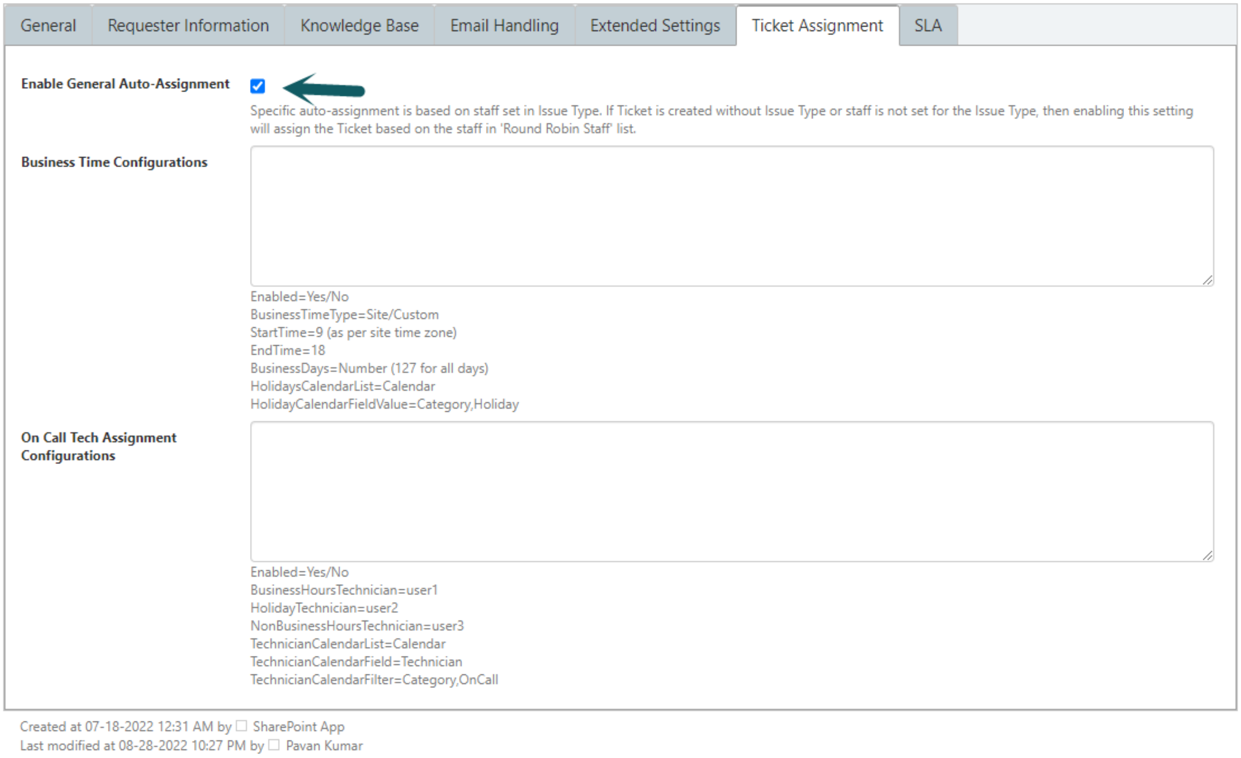


Title: Specify title for round robin staff
Staff: Ticket will be assigned to the staff specified in this column. This should only be one user at a time.
Tickets Count: By default, this will be zero. Count will automatically increase when a Ticket is assigned to the specified Staff.
Based on the Tickets count, Tickets will be auto assigned in round robin fashion to users with the fewest assigned and open tickets.

2. Enable general auto-assignment in the Configurations list.

Go to Application Administration → Auto Assignment → Edit Configuration item and enable 'Enable General Auto-Assignment' as shown below





How auto-assignment will work (use cases):

1. If a Ticket is created with Issue Type selected, and the selected Issue Type has assigned staff configured in the Categorization settings then, Ticket will be auto assigned based on the categorization
2. If a Ticket is created without Issue Type and general auto assignment is enabled in ‘Configuration’ item, then Ticket will be auto assigned based on the staff specified in the ‘Round Robin Staff’ list.
3. If Ticket is not assigned based on the Issue Type and round-robin assignment is not configured, then Ticket will not be auto-assigned. It can be assigned manually from the application.
4. Auto-Assign Tickets Based on Selected Category, Issue Type and Requester Location

Refer this article for more detail: https://www.crowcanyon.help/article/449/

Notifications

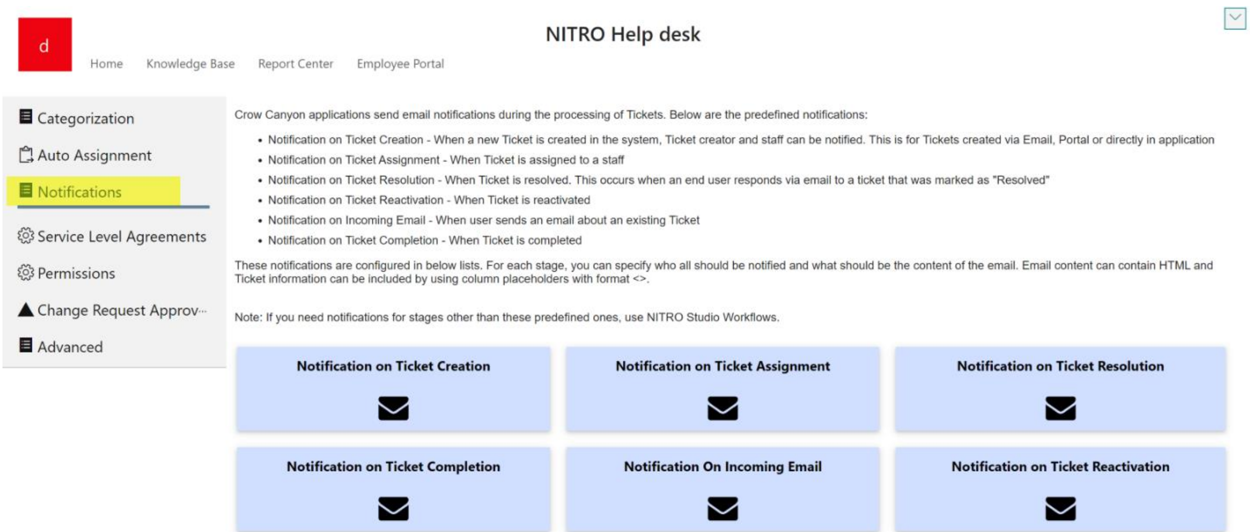
Crow Canyon applications send email notifications during the processing of Tickets. Below are the predefined notifications:

- Notification on Ticket Creation - 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
- Notification on Ticket Assignment - When Ticket is assigned to a staff, either directly or through one of the automated assignment processes
- Notification on Ticket Resolution - When Ticket is resolved.
- Notification on Ticket Reactivation - When Ticket is reactivated. This occurs when an end user responds via email to a ticket that was marked as "Resolved"
- Notification on Incoming Email - When user sends an email about an existing Ticket

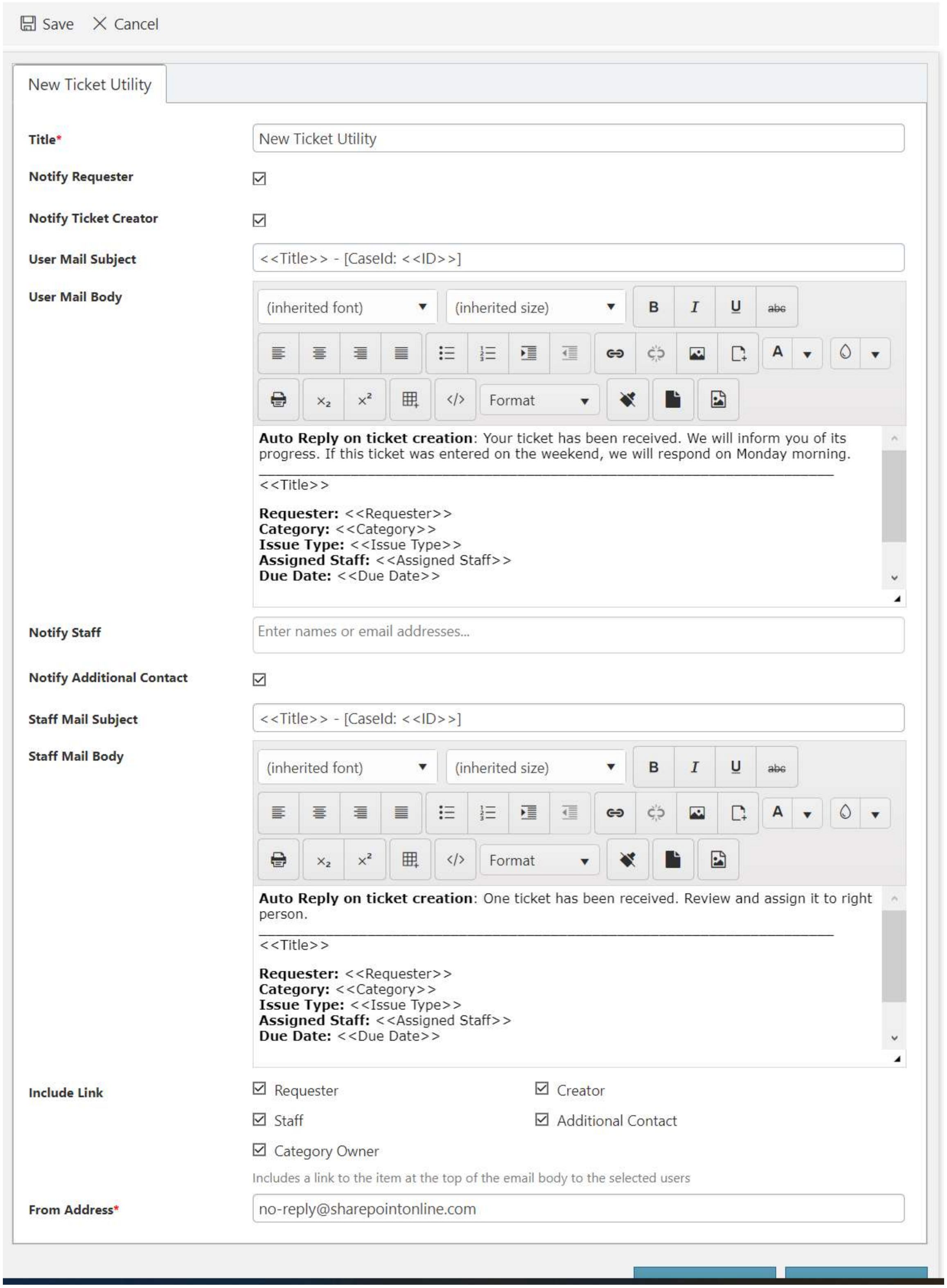
- Notification on Ticket Completion - When Ticket is completed

These notifications are configured in below lists. For each stage, you can specify who 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 <Column Name>.

Note: If you need notifications for stages other than these predefined ones, use NITRO Studio Workflows.



Notification on Ticket Creation:

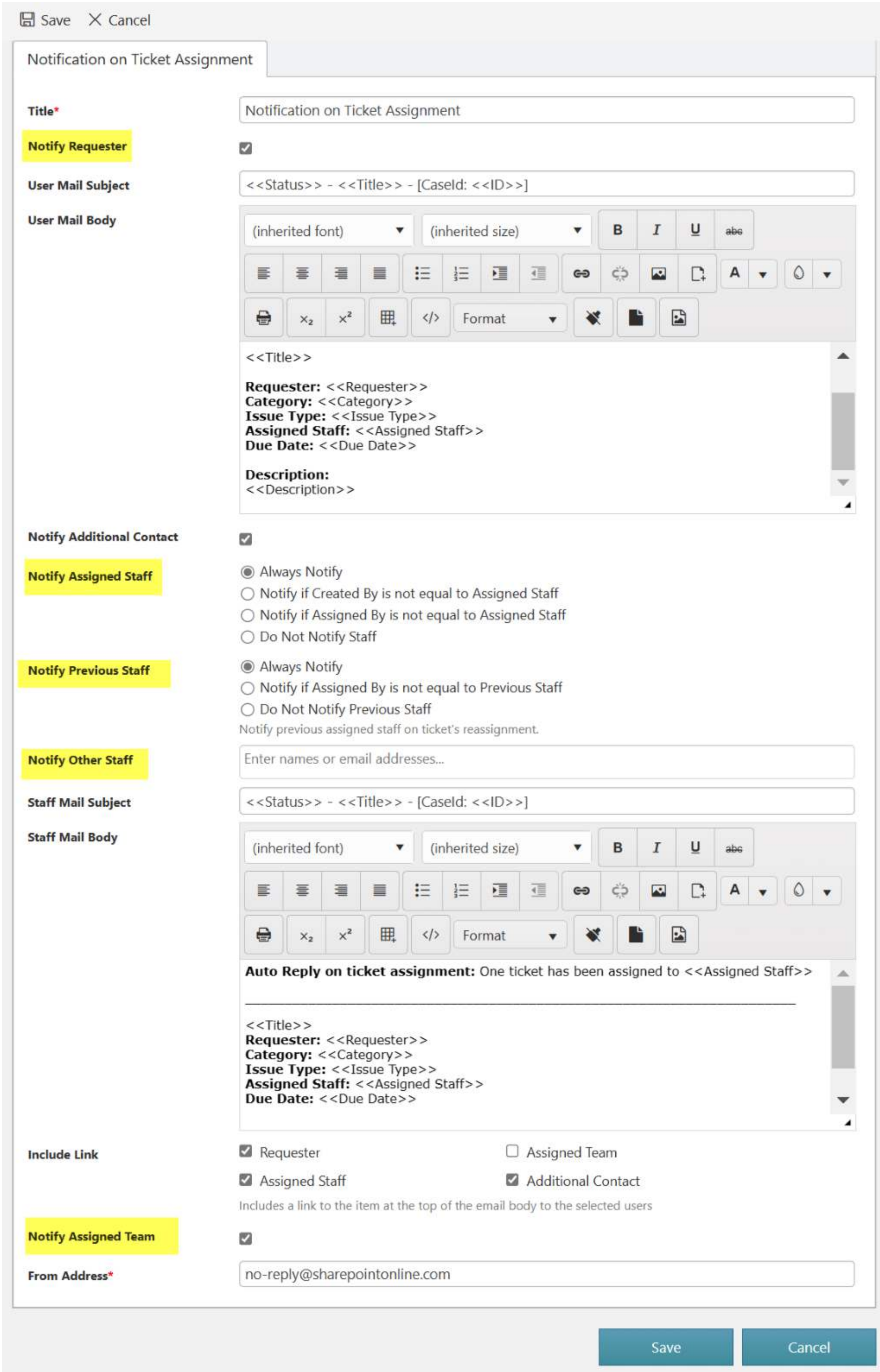


Title: This should be not changed
Notify Requester: Check this box to notify requester.
Notify Ticket Creator: Check this box to notify Ticket creator.
User Mail Subject: provide any valid Subject for mail.

User mail body: It contains the message or information to notify requester that Ticket has been received.
Notify Staff: check this box to notify staff.
Notify Additional Contact: Check this box to Notify additional contact.
Staff Mail Subject: provide any valid Subject for mail.
Staff Mail Body: It contains the message or information to notify staff that one Ticket has been received. Review and assign it to right person.
Include Link: Include a link to the item at the top of the email body to the selected users.
From Address: Provide email address of sender.

Notification on Ticket Assignment:

Send Notification to staff when Ticket is assigned.

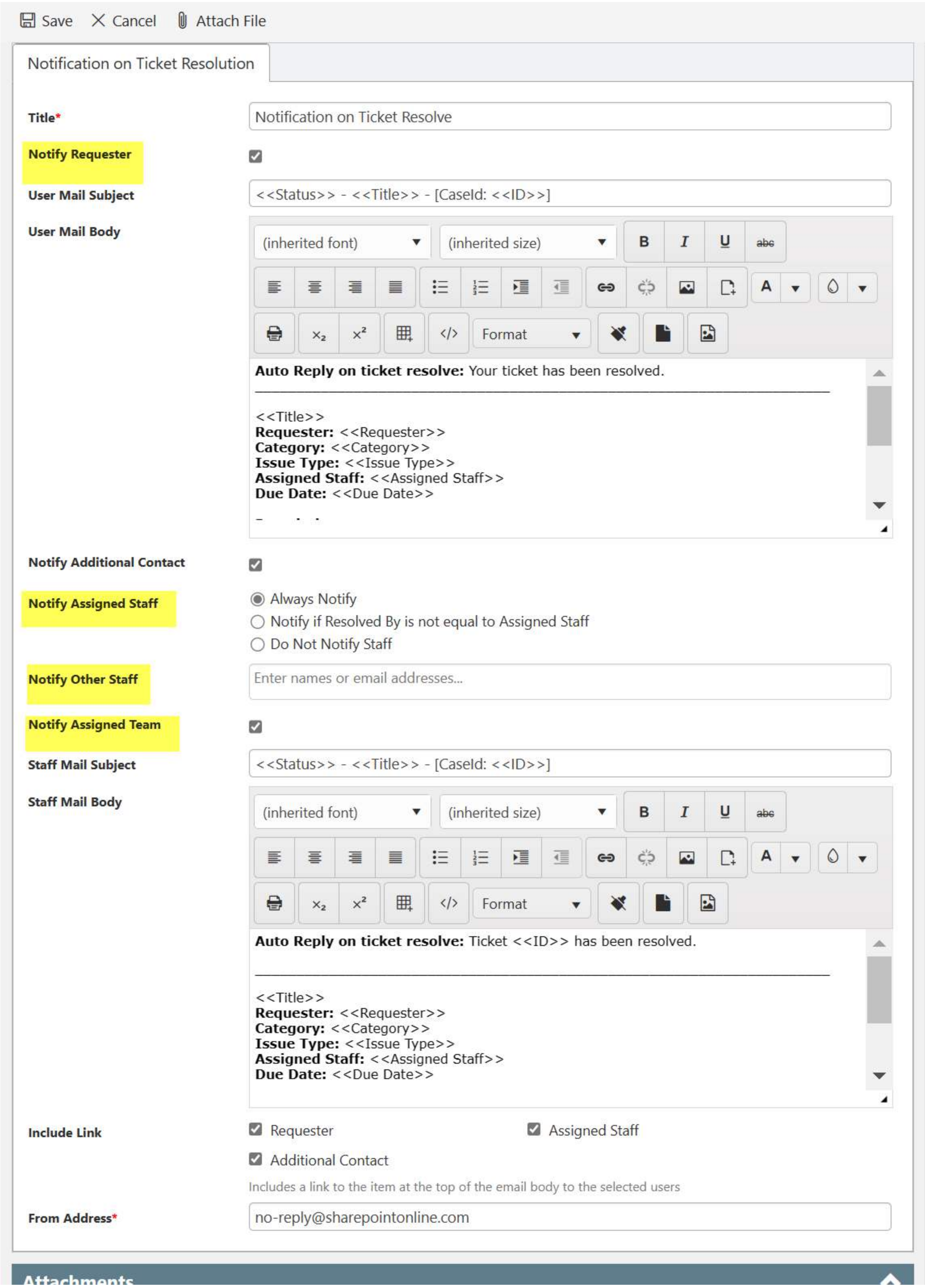


Notify Assigned Staff: Select an option provided in this column to notify assigned staff.
Notify Previous Staff: Select an option provided in this column to notify the previous staff on Ticket assignment.

Notify Other Staff: provide the name of other staff here to notify them when Ticket is assigned to a staff.
Notify Assigned team: Select this checkbox to notify team on Ticket assignment.

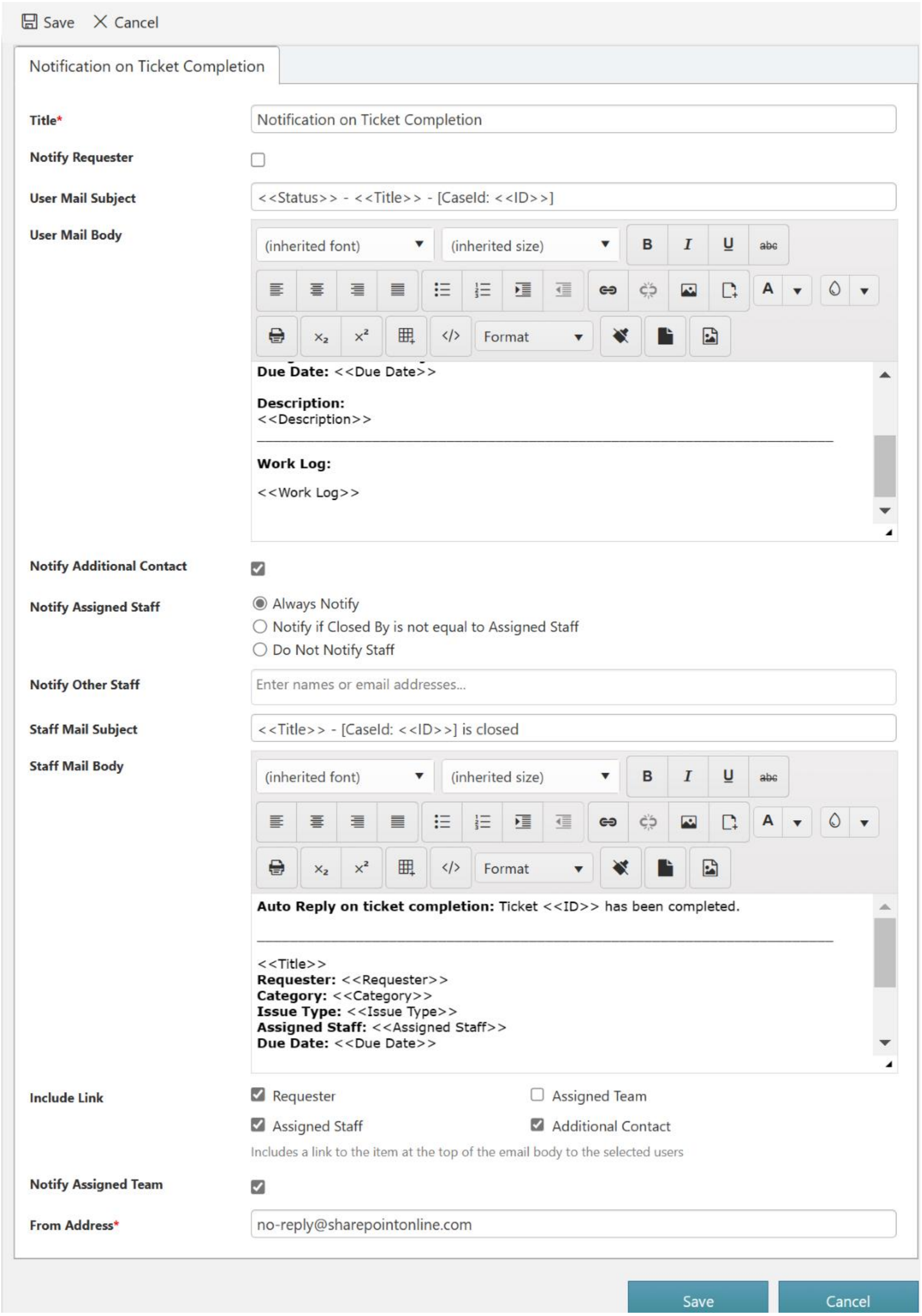
Notification on Ticket Resolution:

When Ticket Is resolved, send notification mail to requester and assigned staff.



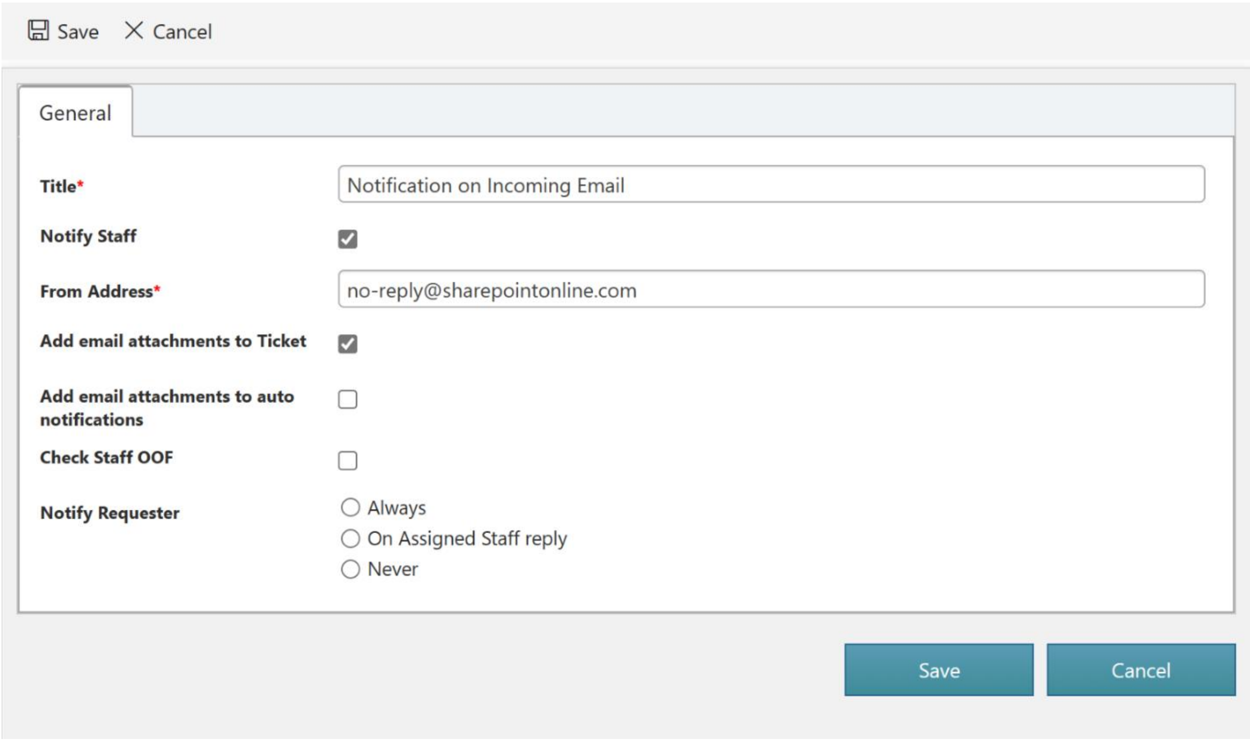
Notification on Ticket Completion:

- When Ticket is completed, notification is sent to assigned staff and assigned team.


Save
Cancel
Notification on Ticket Completion
Title*
Notification on Ticket Completion
Notify Requester
User Mail Subject
<<Status>> - <<Title>> - [CaseId: <<ID>>]
User Mail Body
(inherited font)
(inherited size)
Format
Due Date: <<Due Date>>
Description:
<<Description>>
Work Log:
<<Work Log>>
Notify Additional Contact
Notify Assigned Staff
Always Notify
Notify if Closed By is not equal to Assigned Staff
Do Not Notify Staff
Notify Other Staff
Enter names or email addresses...
Staff Mail Subject
<<Title>> - [CaseId: <<ID>>] is closed
Staff Mail Body
(inherited font)
(inherited size)
Format
Auto Reply on ticket completion: Ticket <<ID>> has been completed.
<<Title>>
Requester: <<Requester>>
Category: <<Category>>
Issue Type: <<Issue Type>>
Assigned Staff: <<Assigned Staff>>
Due Date: <<Due Date>>
Include Link
Requester
Assigned Team
Assigned Staff
Additional Contact
Includes a link to the item at the top of the email body to the selected users
Notify Assigned Team
From Address*
no-reply@sharepointonline.com
Save
Cancel

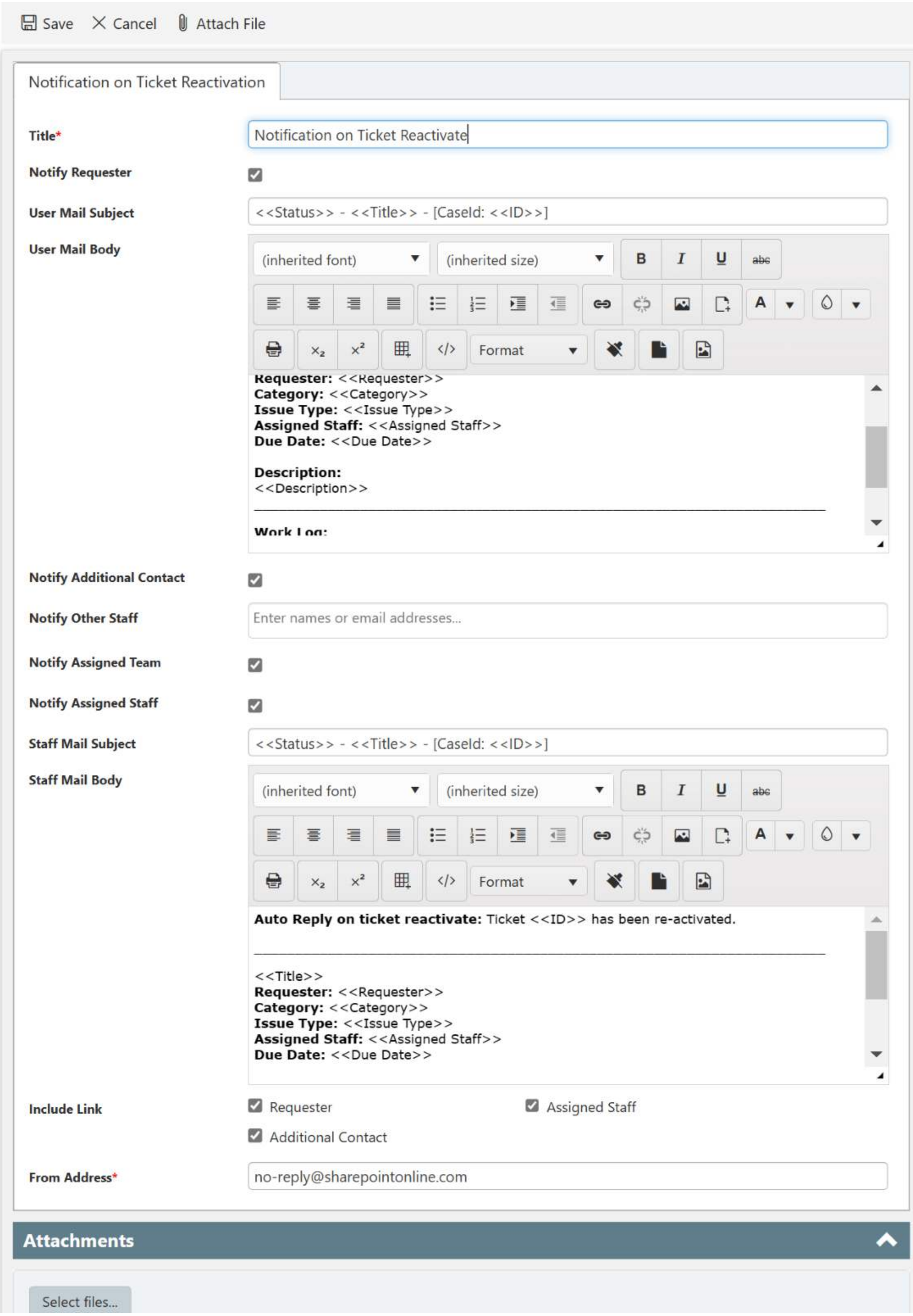
Notification on Incoming Email:

When user sends an email about an existing Ticket, notification is sent to staff.



Notification on Ticket Reactivation:

When Ticket is reactivated, notification is sent to requester, assigned staff, and assigned team.



Save
Cancel
Attach File
Notification on Ticket Reactivation
Title*
Notification on Ticket Reactivate
Notify Requester
User Mail Subject
<<Status>> - <<Title>> - [CaseId: <<ID>>]
User Mail Body
(inherited font)
(inherited size)
Format
Requester: <<Requester>>
Category: <<Category>>
Issue Type: <<Issue Type>>
Assigned Staff: <<Assigned Staff>>
Due Date: <<Due Date>>
Description:
<<Description>>
Work Log:
Notify Additional Contact
Notify Other Staff
Enter names or email addresses...
Notify Assigned Team
Notify Assigned Staff
Staff Mail Subject
<<Status>> - <<Title>> - [CaseId: <<ID>>]
Staff Mail Body
(inherited font)
(inherited size)
Format
Auto Reply on ticket reactivate: Ticket <<ID>> has been re-activated.
<<Title>>
Requester: <<Requester>>
Category: <<Category>>
Issue Type: <<Issue Type>>
Assigned Staff: <<Assigned Staff>>
Due Date: <<Due Date>>
Include Link
Requester
Assigned Staff
Additional Contact
From Address*
no-reply@sharepointonline.com
Attachments
Select files...

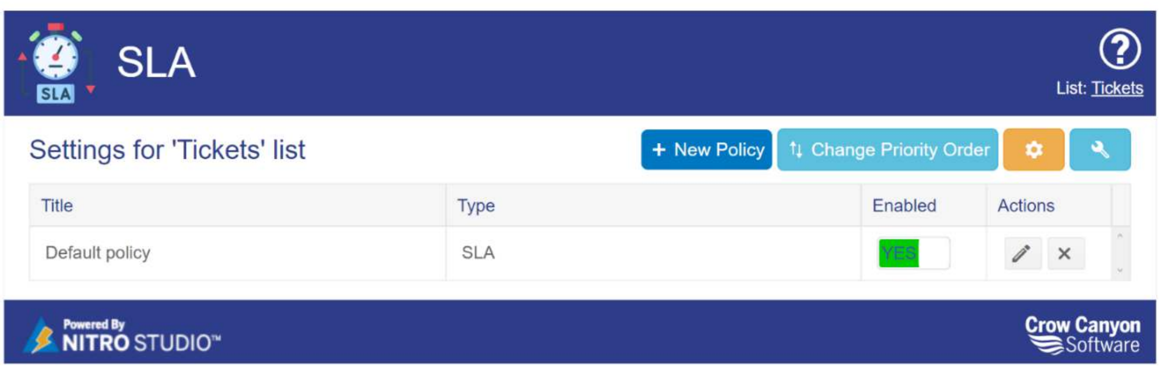
Service Level Agreements

Service Level Agreements can be set up based on any criteria desired. Out of the box, you can set SLAs by Category, Issue Type, and/or Priority. Notifications will be sent out when SLAs are breached. See also the SLA dashboard for SLA metrics.

- Response Hours - How many hours before a first response should go to the end user.
- Reminder Hours - How many hours before a reminder will go out. Usually less than the Resolution Hours
- Resolution Hours - How many hours the team has to close the Ticket.

SLA page is shown below:

Click SLA tile to configure SLAs. Below shown page will open:
Administrator can configure new policies or can edit old policies on this page.



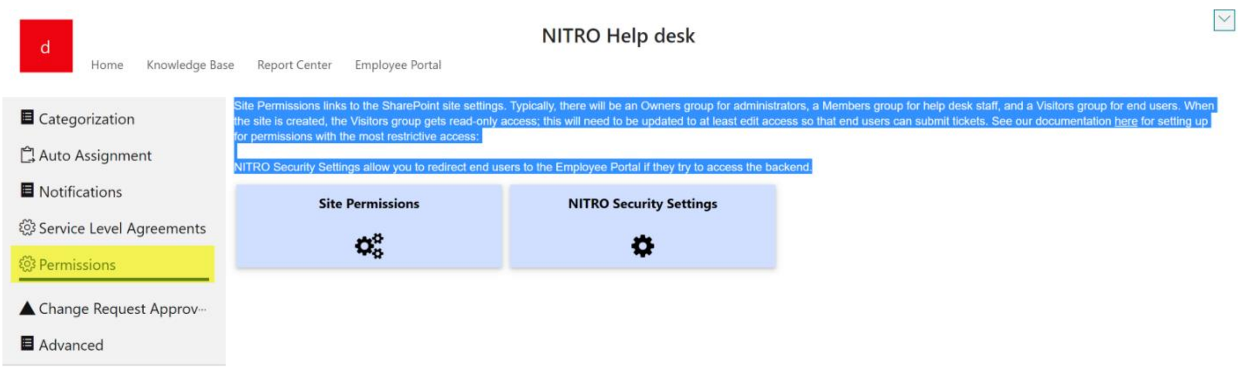
Please refer 'SLA' article for more detail on service level agreement.
SLA.docx (sharepoint.com)

Permissions

Site Permissions links to the SharePoint site settings. Typically, there will be an Owners group for administrators, a members group for help desk staff, and a Visitors group for end users. When the site is created, the Visitors group gets read-only access; this will need to be updated to at least edit access so that end users can submit tickets. See our documentation [here](#) for setting up for permissions with the most restrictive access:

NITRO Security Settings allow you to redirect end users to the Employee Portal if they try to access the backend.

Change



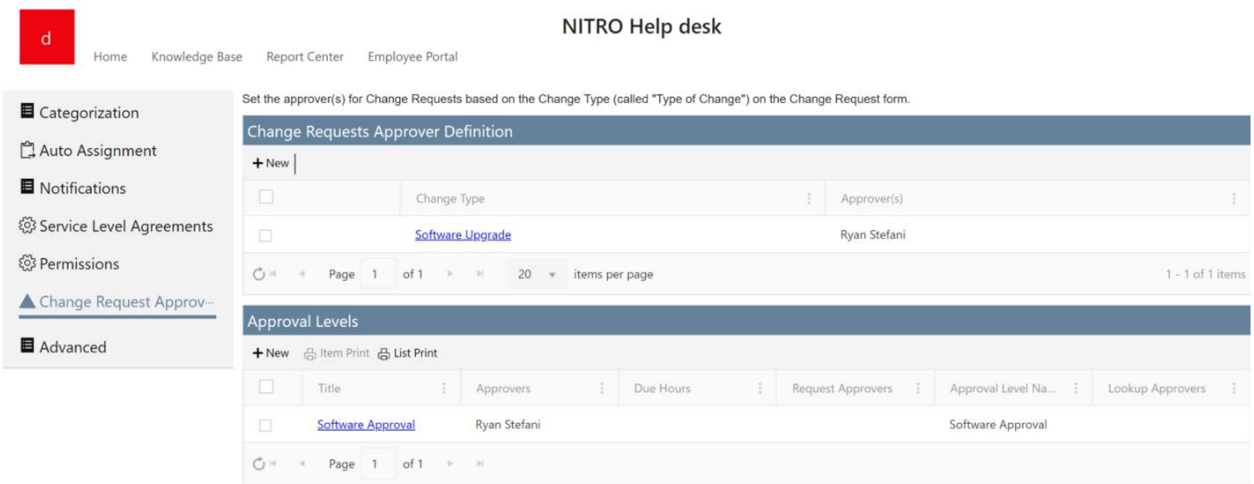
Change Request Approvers

A change request approval process is a series of steps that must be followed to approve and implement a change in the System, Hardware, or Application etc. At times, to provide the resolution for Tickets and to implement new requirements, changes are required in the System, Hardware, or Application etc. These changes are handled through 'Change Requests' process. Each 'Change Request' that is initiated must undergo change request approval process.

Change Request Approval Process typically goes through below mentioned steps

1. Create Change Request: A change request is initiated and submitted. This should include the details about the change required, the reason for the request and other relevant details that can help the approver understand its impact.
2. Approval: The change request is reviewed by the approver and approved/denied as per assessment done. There can be multiple levels of approval required based on the impact of the change. Once approved, the change request is assigned to the appropriate team to implement it.
3. Implementation: Approved change requests are assigned to the team. Team makes appropriate changes and implements it.
4. Close: Once implemented successfully or if denied then Change Request is closed.

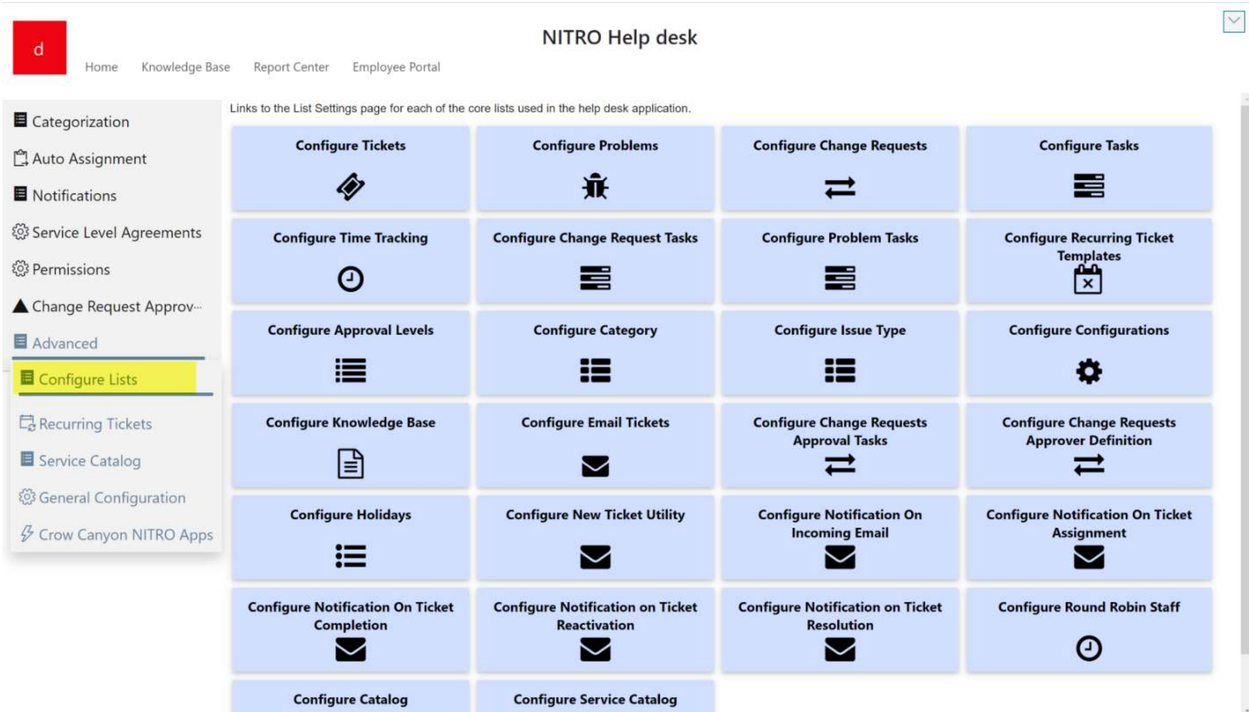
Change Request Approvers page is shown below:



Advanced

Configure Lists:

Below page shows the link to list settings page for each of the core list used in NITRO Help Desk application

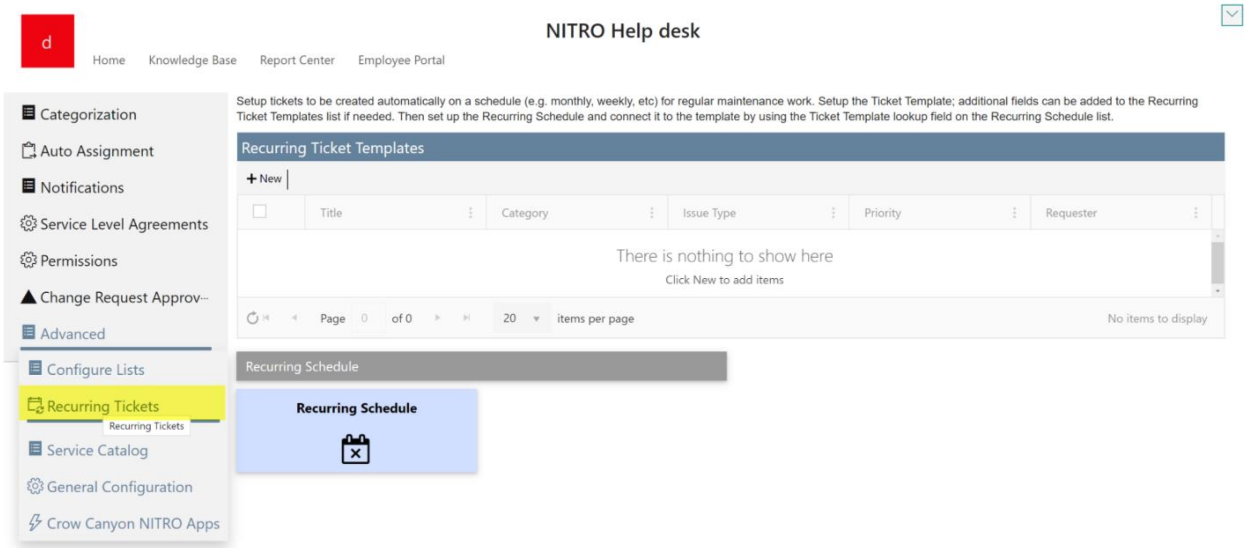


Click tile to configure the list.

Recurring Tickets

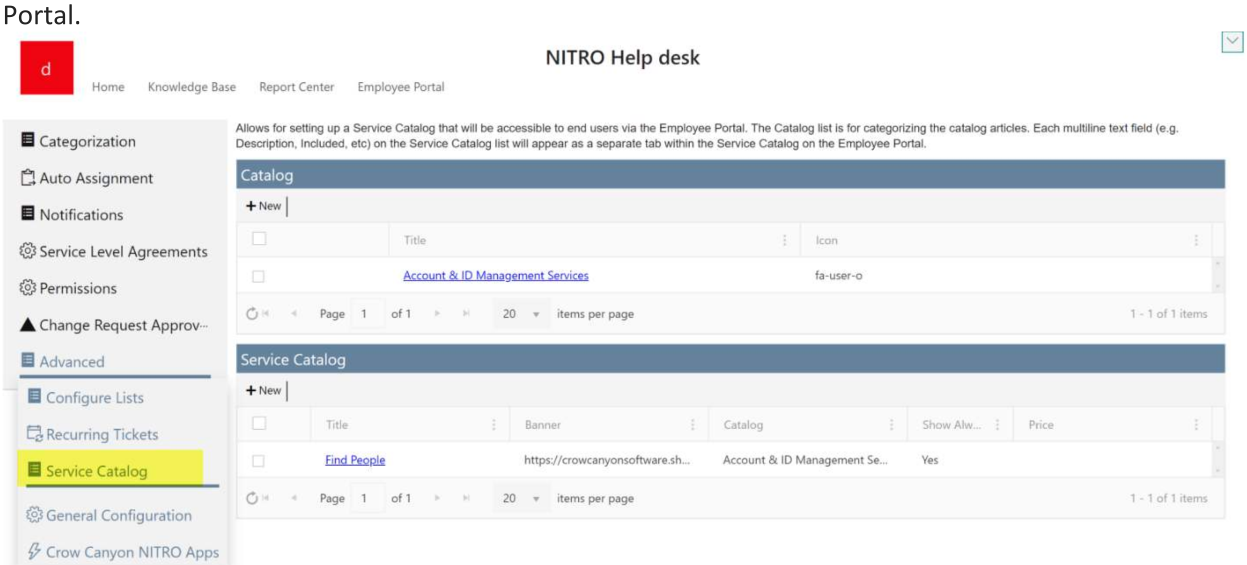
Setup Tickets to be created automatically on a schedule (e.g., monthly, weekly, etc) for regular maintenance work. Setup the Ticket Template; additional fields can be added to the Recurring Ticket

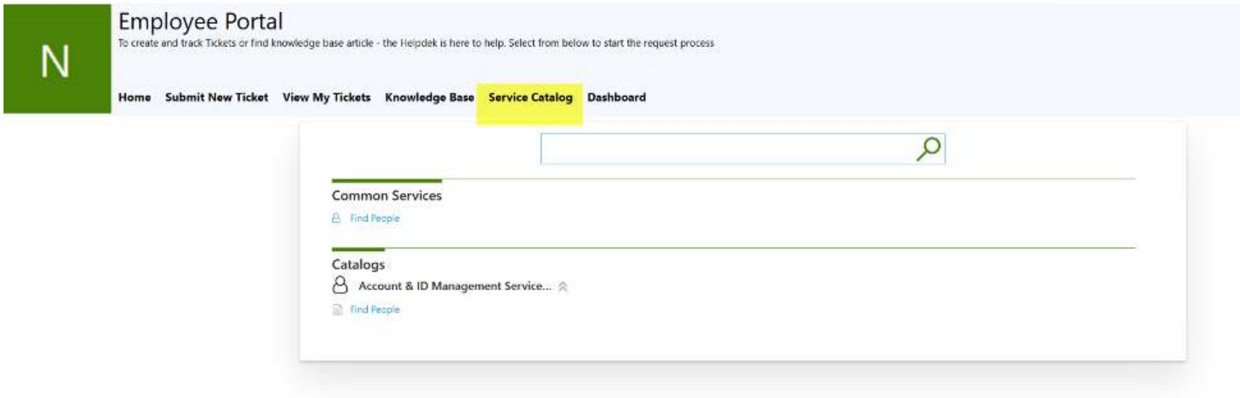
Templates list if needed. Then set up the Recurring Schedule and connect it to the template by using the Ticket Template lookup field on the Recurring Schedule list.



Service Catalog

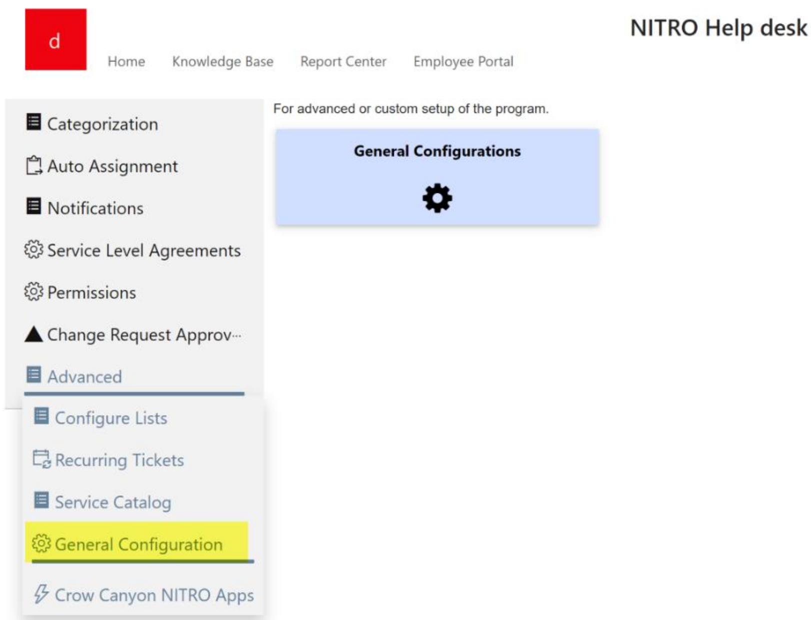
Allows for setting up a Service Catalog that will be accessible to end users via the Employee Portal. The Catalog list is for categorizing the catalog articles. Each multiline text field (e.g., Description, Included, etc) on the Service Catalog list will appear as a separate tab within the Service Catalog on the Employee Portal.



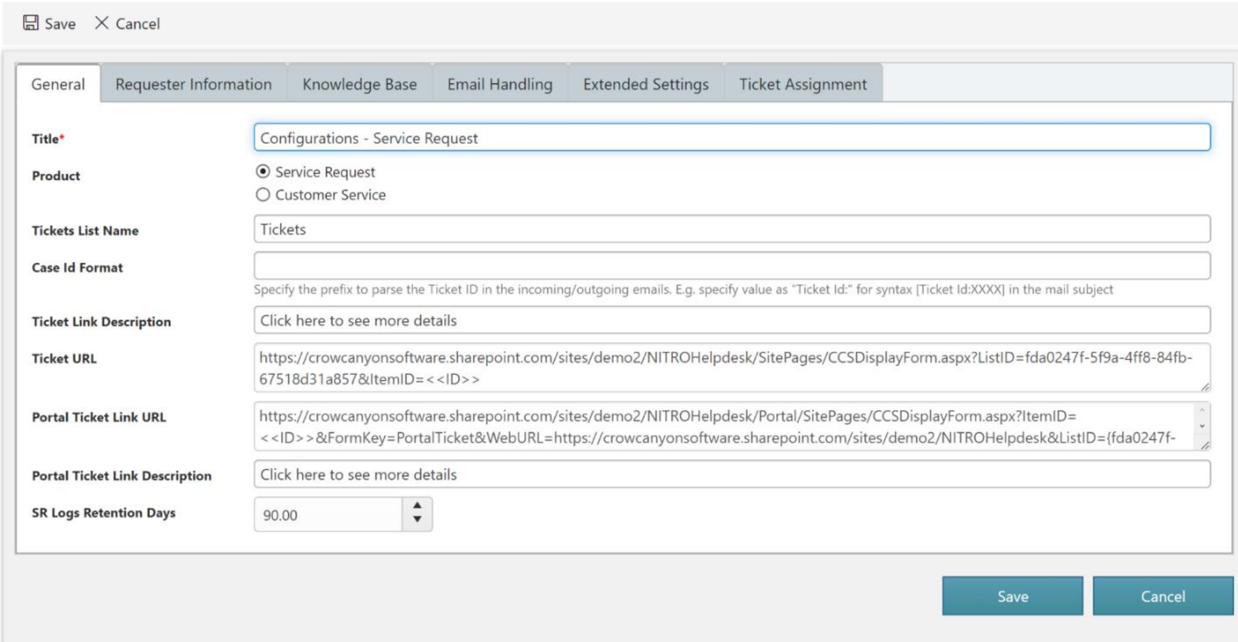


General Configuration

For advanced or custom setup of program, general configuration is provided.



Click ‘General Configuration’ tile to see settings as shown below:



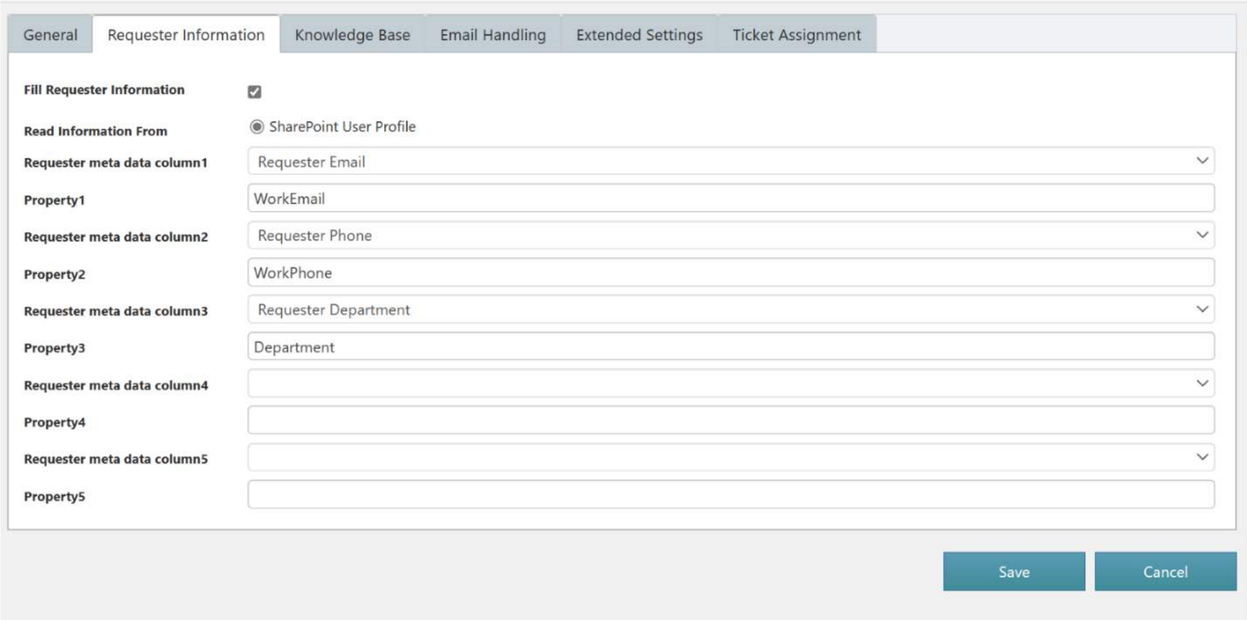
In General Configuration, configure settings or Ticket list. Product app will work according to these settings.

In General tab:

Title: Provide Title
Product: Select product type
Ticket list name: Provide name of Ticket list
Case Id Format: Specify the prefix to parse the Ticket ID in the incoming/outgoing emails.
Ticket Link Description: Provide Ticket link description
Ticket URL: provide Ticket Form URL here
Portal Ticket Link URL: Provide portal Ticket link URL here
Portal Ticket Link Description: provide Portal Ticket Link Description here
SR logs Retention Days: provide Retention days here

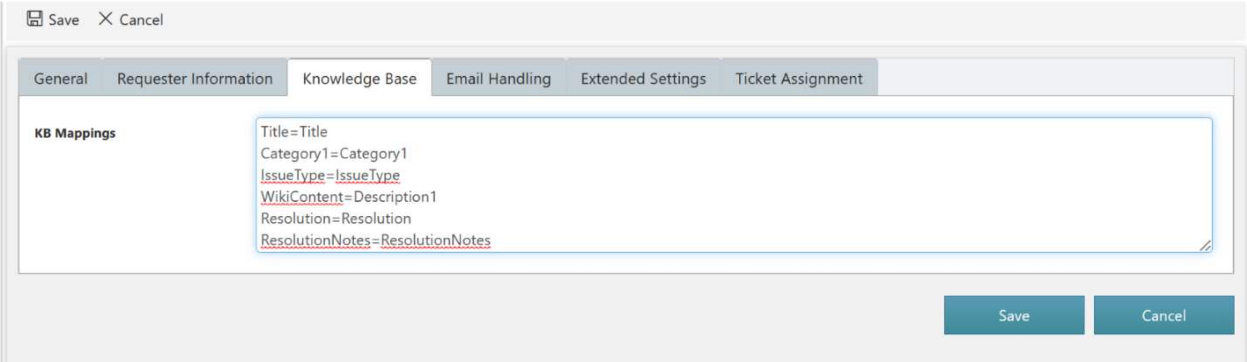
Requester Information Tab:

Provide Requester related information under this tab as shown below:



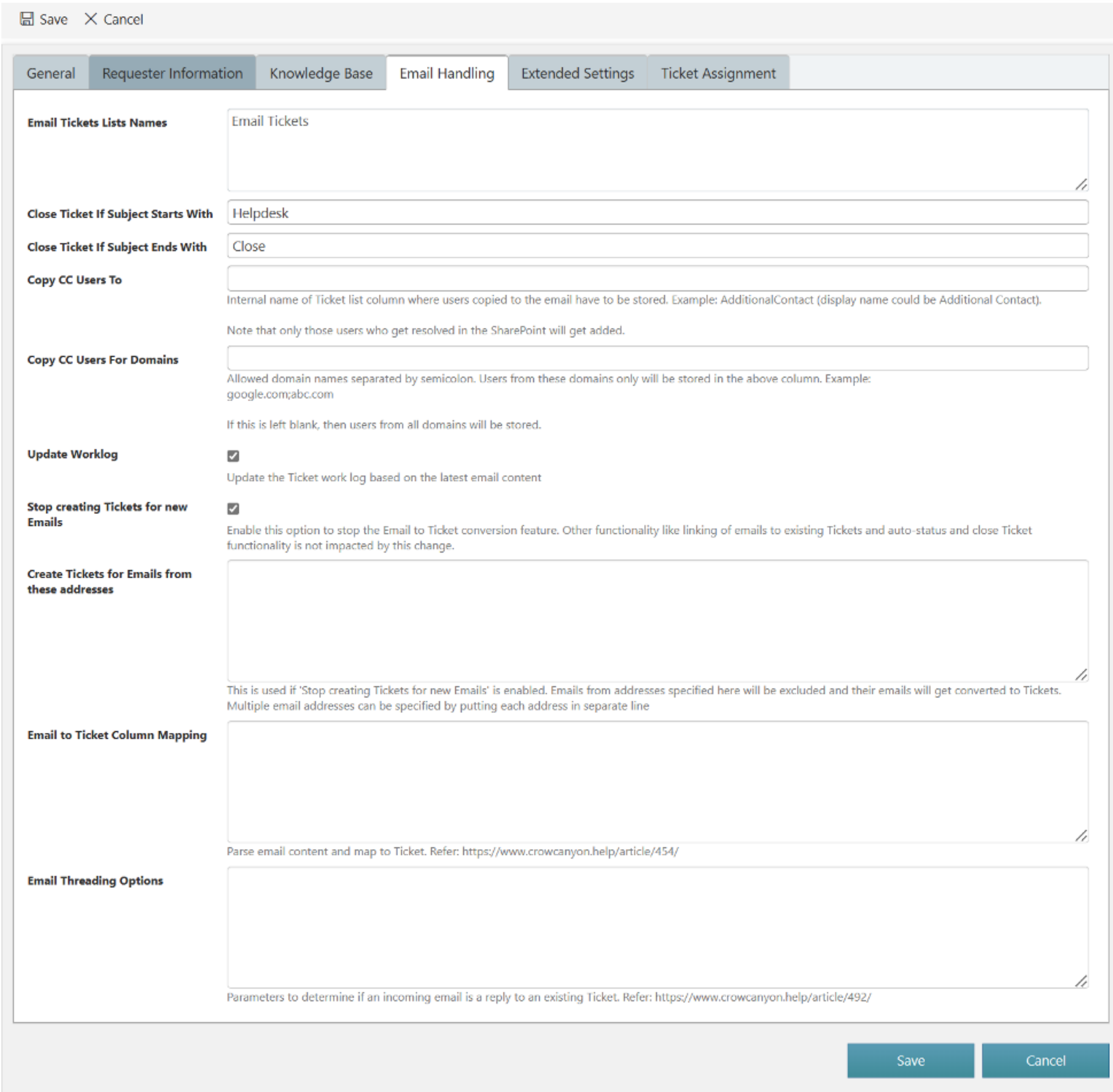
Knowledge Base Tab:

Provide knowledge base related mapping under this tab as shown below:



Email Handing:

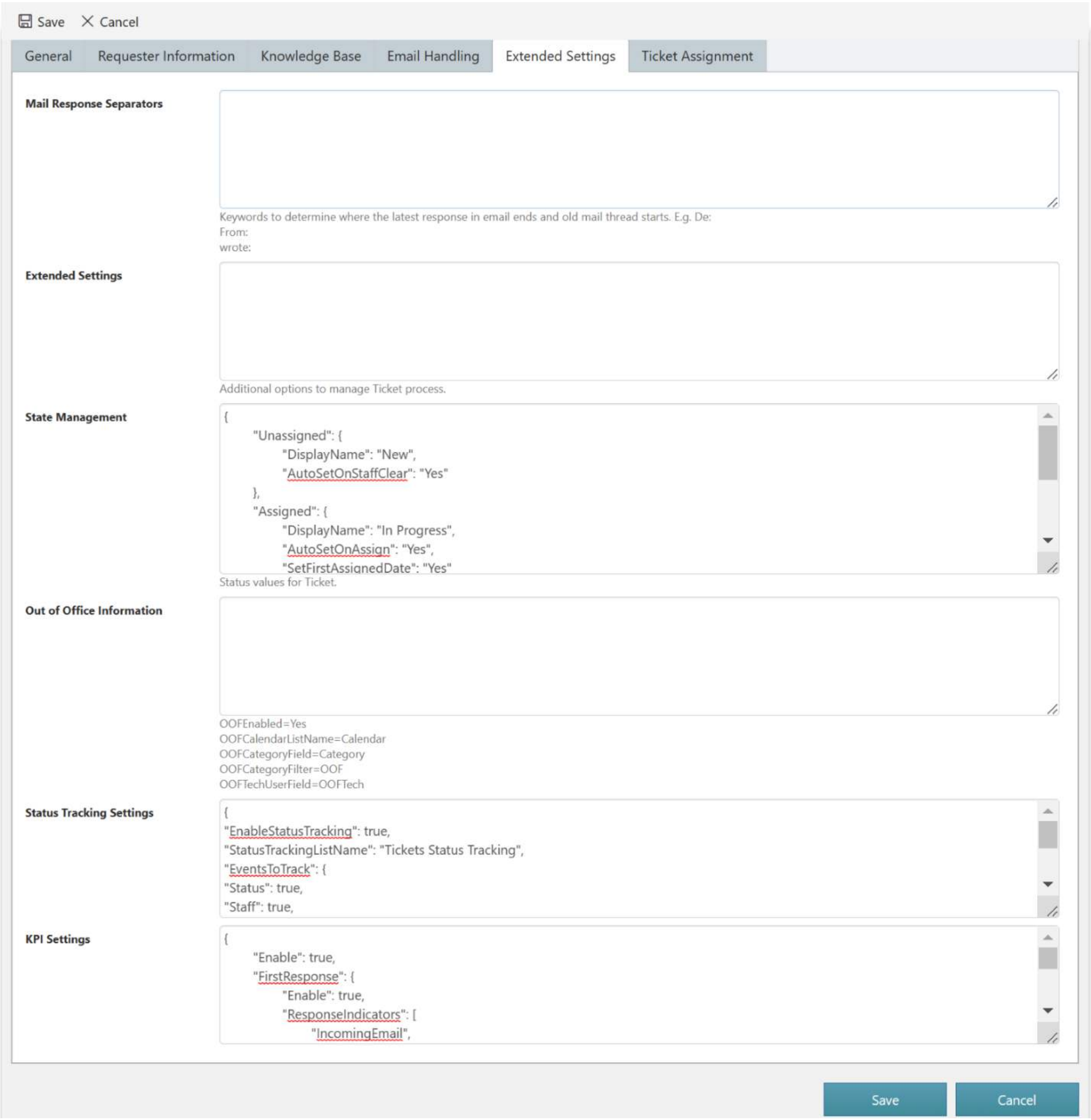
Configure settings in Email sync app for this. Provide settings for handling emails under this tab as shown below:



Email Tickets Lists Names: Provide name of Email Ticket list
Close Ticket if Subject starts with: If an email (with case id in subject) is send which starts with 'Helpdesk' in the subject, then it should close the Ticket.
Close Ticket If Subject Ends with: If an email (with case id in subject) is send which ends with 'Close' in the subject, then it should close the Ticket.
Copy CC Users To: Internal name of Ticket list column where users copied to the email have to be stored. Example: AdditionalContact (display name could be Additional Contact). Note that only those **users who get resolved in the SharePoint will get added.**
Copy CC Users to Domains: Allowed domain names separated by semicolon. Users from these domains only will be stored in the above column. Example: google.com; abc.com If this is left blank, then users from all domains will be stored.
Update Worklog: If an email is sent for existing Ticket (case id in subject), then it will add the email content to Ticket worklog.

Stop Creating Tickets for new Emails: Enable this option to stop the Email to Ticket conversion feature. Other functionality like linking of emails to existing Tickets and auto-status and close Ticket functionality is not impacted by this change.
Create Tickets for Emails from these addresses: This is used if 'Stop creating Tickets for new Emails' is enabled. Emails from addresses specified here will be excluded and their emails will get converted to Tickets. Multiple email addresses can be specified by putting each address in separate line
Email to Ticket Column Mapping: Parse email content and map to Ticket. Refer: https://www.crowcanyon.help/article/454/
Email Threading Options: Parameters to determine if an incoming email is a reply to an existing Ticket. Refer: https://www.crowcanyon.help/article/492/

Extended Settings Tab:



Mail Response Separators: Keywords to determine where the latest response in email ends and old mail thread starts. E.g., De: From: wrote:
Extended Settings: Additional options to manage Ticket process.
State Management: Status values for Ticket.

```
{
	"Unassigned": {
		"DisplayName": "New",
		"AutoSetOnStaffClear": "Yes"
	},
	"Assigned": {
```

```
                "DisplayName": "In Progress",
                "AutoSetOnAssign": "Yes",
                "SetFirstAssignedDate": "Yes"
        },
        "Resolved": {
                "DisplayName": "Resolved"
        },
        "Closed": {
                "DisplayName": "Closed"
        }
}
```

For example:
Here, ‘Unassigned’ can be changed to ‘New’ (DisplayName will remain same ‘New’)
‘Assigned’ can be changed to ‘In Progress’ (Display Name will remain same’ In Progress’)

Status Tracking Settings: Provide bellow settings in this column for Status tracking of Ticket

```
{
"EnableStatusTracking": true,
"StatusTrackingListName": "Tickets Status Tracking",
"EventsToTrack": {
"Status": true,
"Staff": true,
"Team": true,
"Priority": true,
"Team and Staff": true
},
"AdditionalColumnMappings": []
}
```

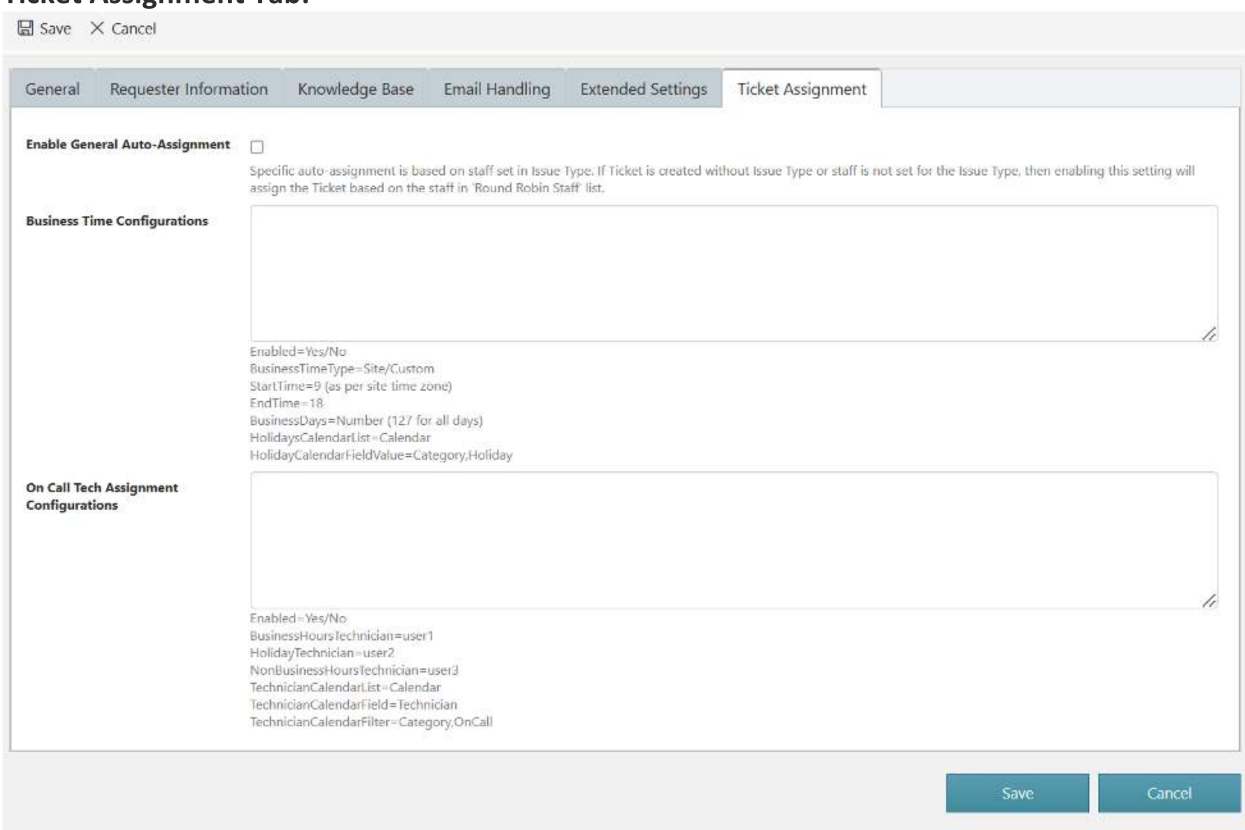
- If ‘Request Status’ of Ticket is changed then an entry gets created in ‘Tickets Status Tracking’ list with ‘Type of change' column value ‘Status’, show ‘Previous Status and ‘New Status’ value of Ticket
- If ‘Assigned Staff’ of Ticket is changed then an entry gets created in ‘Tickets Status Tracking’ list with ‘Type of change’ column value ‘Staff’
- If ‘Assigned Team’ of Ticket is changed then an entry gets created in ‘Tickets Status Tracking’ list with ‘Type of change’ column value ‘Team’
- If ’Priority’ of Ticket is changed then an entry gets created in ‘Tickets Status Tracking’ list with ‘Type of change’ value ‘Priority’
- If ’Assigned Staff’ and ‘Assigned Team’ of Ticket is changed altogether then an entry gets created in ‘Tickets Status Tracking’ list with ‘Type of change’ value ‘Team and Staff’.

KPI Settings: Key Performance Indicators (KPI) settings are as shown below:

```
{
        "Enable": true,
        "FirstResponse": {
                "Enable": true,
                "ResponseIndicators": [
                        "IncomingEmail",
```

```
                    "ItemUpdate",
                    "OutgoingEmail"
                ]
        },
        "FirstAssignTime": {
                "Enable": true
        },
        "TimeToFirstAssign": {
                "Enable": true,
                "BusinessTime": true
        },
        "FirstResponseTime": {
                "Enable": true,
                "BusinessTime": true
        },
        "TimeToRespondAfterAssign": {
                "Enable": true,
                "BusinessTime": true
        }
}
```

Ticket Assignment Tab:



Enable General Auto-Assignment: Specific auto-assignment is based on staff set in Issue Type. If Ticket is created without Issue Type or staff is not set for the Issue Type, then enabling this setting will assign the Ticket based on the staff in 'Round Robin Staff' list.

Business Time Configuration: configure business time configuration as shown below:

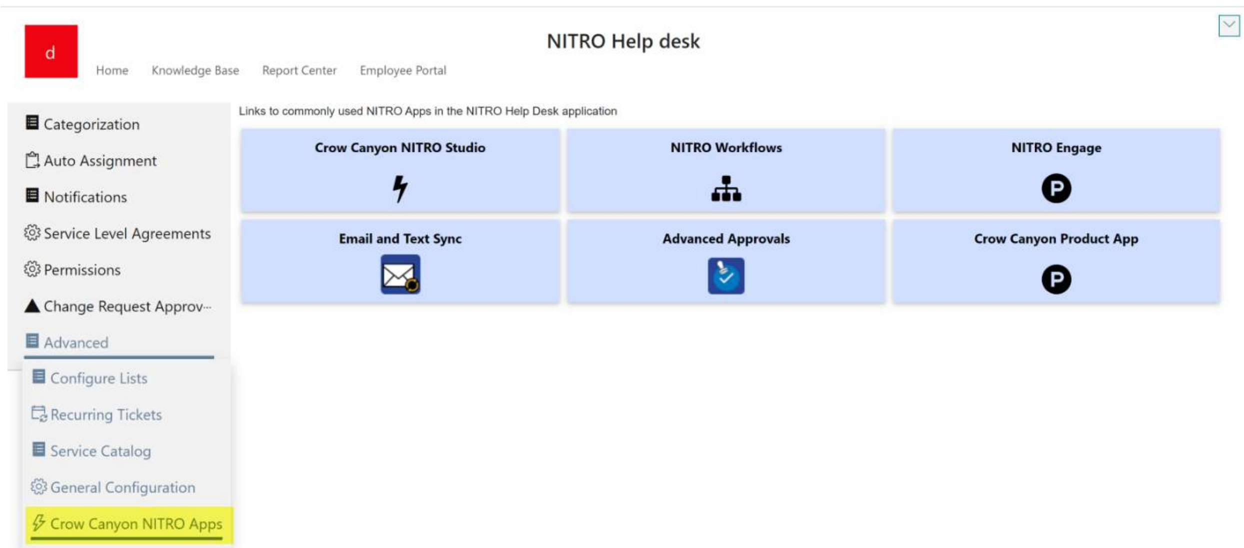
Enabled=Yes/No
BusinessTimeType=Site/Custom
StartTime=9 (as per site time zone)
EndTime=18
BusinessDays=Number (127 for all days)
HolidaysCalendarList=Calendar
HolidayCalendarFieldValue=Category,Holiday

On Call Tech Assignment Configurations: Configure this setting as shown below:

Enabled=Yes/No
BusinessHoursTechnician=user1
HolidayTechnician=user2
NonBusinessHoursTechnician=user3
TechnicianCalendarList=Calendar
TechnicianCalendarField=Technician
TechnicianCalendarFilter=Category,OnCall

Crow Canyon NITRO Apps

Administrators have access to commonly used NITRO apps in NITRO Help Desk application as shown below:



- Crow Canyon NITRO Studio: Crow Canyon NITRO Studio is an **easy-to-use no-code solution** that provides the components to build highly configurable applications in SharePoint online.
- NITRO Workflows: NITRO Workflows allows you to automate your business processes by creating complex workflows that execute based on changing data conditions or times. It has powerful, robust features that will enhance the productivity of your developers yet can also be simple enough for process automation by power users. All workflows are comprised of a name, a source list, a triggering event, optional conditions to streamline or restrict the

workflow, and one or more actions that can create, update, or delete list data, send emails, and manage list permissions.

- NITRO Engage: NITRO Engage App can be installed in MS teams. It provides an easy to use and interactive chat-based interface for using NITRO applications. It enhances overall customer experience and is highly convenient for users.
- Email and Text Sync: **Email Sync** creates a connection between an Exchange or Office 365 mailbox and a SharePoint list. Emails sent to the specified mailbox are converted to SharePoint list items. The emails can come from internal users or external customers. One use of Email Sync is that if employees are used to sending to a certain mailbox for support or other services, they can continue to do this while a new SharePoint or Office 365 application is used by staff to manage those requests, issues, inquiries, etc. Another use is with a web form where users or customers enter information; the web form then sends an email to the mailbox with the form data, where it is converted to a SharePoint list item.

New emails can be converted into SharePoint list items (Tickets, requests, etc.).
Emails about an existing Ticket can be linked to that Ticket and become part of its Email History, making it easy to see the chain of communication. These emails need some identifier in the subject or body to know that the email is related to a specific ticket, such as [CASEID: 123] in the Subject.
Text Sync creates a connection between a phone number (provided by Twilio during account setup) and a SharePoint list. Texts sent to the specified phone number are converted to SharePoint list items. The texts can come from internal users or external customers. Text Sync is used in conjunction with Action Verbs. The way it works is that the text is parsed, and words are mapped to columns in a SharePoint list. This could be mapping the Action Verb and the Ticket ID to columns in this list. A NITRO Workflow can run on that list using the "Item is Created" trigger. The Workflow reads the columns that have the Action Verb and ID in them and then runs that appropriate action (Update Item, Send Email, etc.). This process automates the application for text users and gives them a wide range of responses.
Text messages can be sent out to users and staff from the tickets via NITRO Workflows and Custom Actions.
Users and staff can respond by text using pre-defined "Action Verbs" that kick off a workflow, such as "APPROVE" or "CLOSE" a ticket or request. You can configure any number of Action Verbs using the Text Sync described below.

- Advanced Approval: NITRO Advanced Approvals allows new items to be approved, denied, or sent back via an automated email approval process.

Key Features

- Items can be approved, denied, or sent back
- Approval notification emails are configured through templates and automatically sent based on the approval action.
- An item can have multiple levels of approvals.

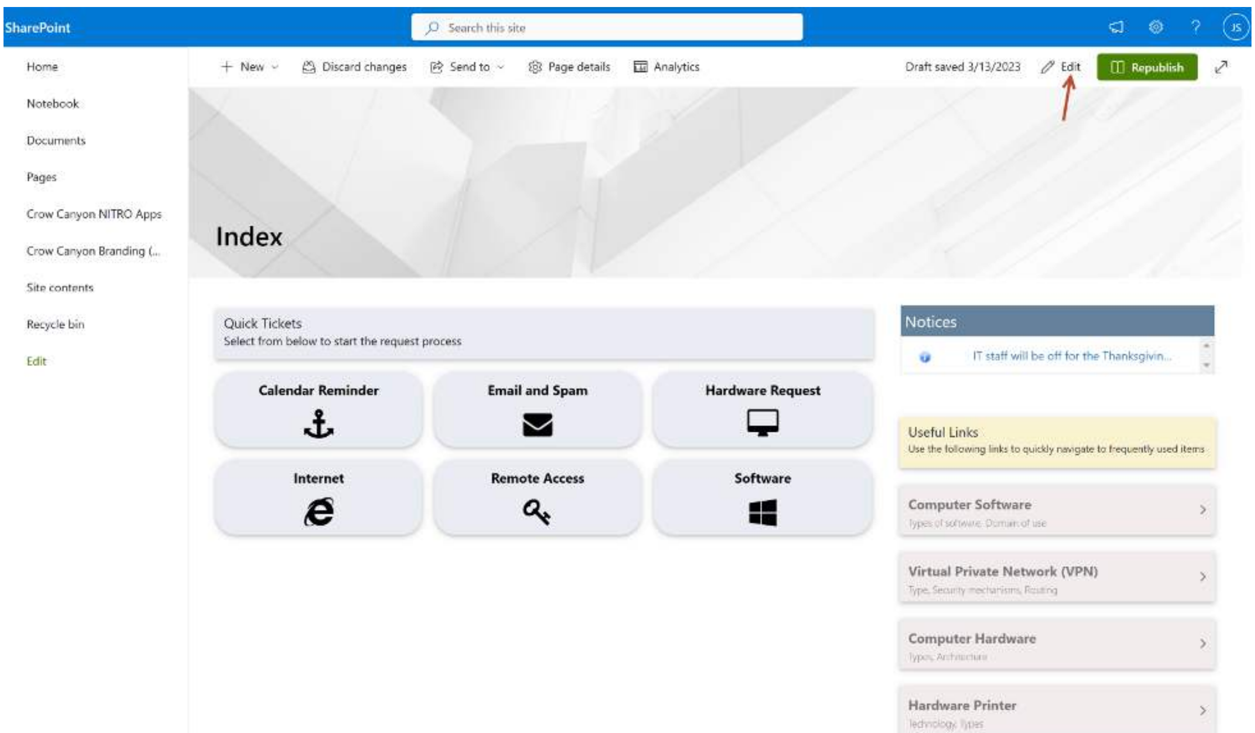
Crow Canyon Product App

All different features like **email to Ticket conversion, auto-notifications, auto-assignment, case-id generation** etc. are handled by Crow Canyon Product App. This app captures different events (Item Created, Item Updated) on Email Tickets and Tickets lists.
App Features
Enable/Disable conversion of incoming Emails to Tickets.

Enable/Disable notifications and other business processes on Ticket creation and update.
Enable/Disable above process to run in async process.
Please refer this article for more detail: [How to use Crow Canyon Product App to execute the functionality for the missing events on Email Tickets and Tickets list? - Crow Canyon Software Support]

Employee Portal

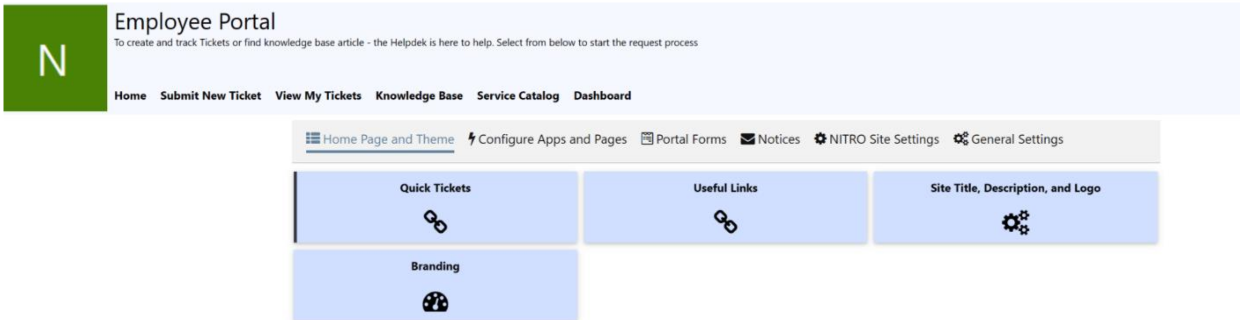
Administrator also have access to Employee portal site. Admin can make necessary changes in 'Portal' site like 'Background image',' Header', 'Theme', 'Forms' etc.
To modify page, click 'Edit' link as shown below:



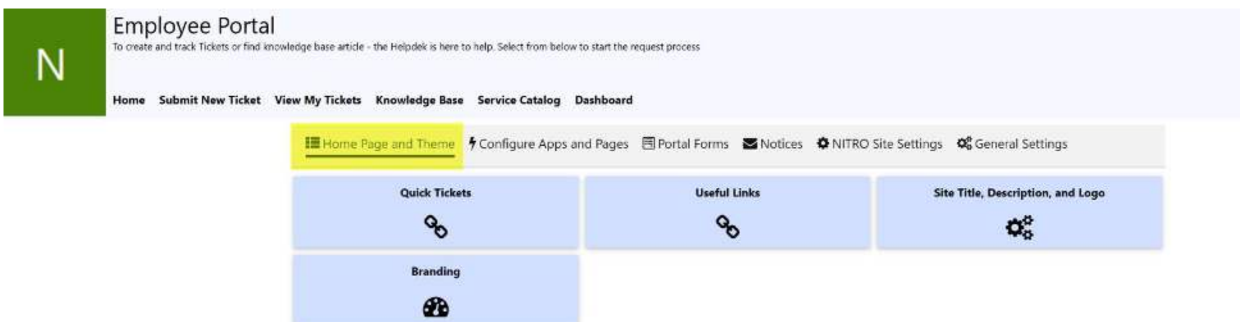
After editing the page, 'Republish' the page.
Accessing the Administration workspace page

Go to administration page by following below steps:
Site contents -> Site Pages -> Administration.aspx
This page allows the Administrator to configure following:

1. Home Page and Theme
2. Configure Apps and Pages
3. Portal Forms
4. Notices
5. NITRO Site Settings
6. General Settings



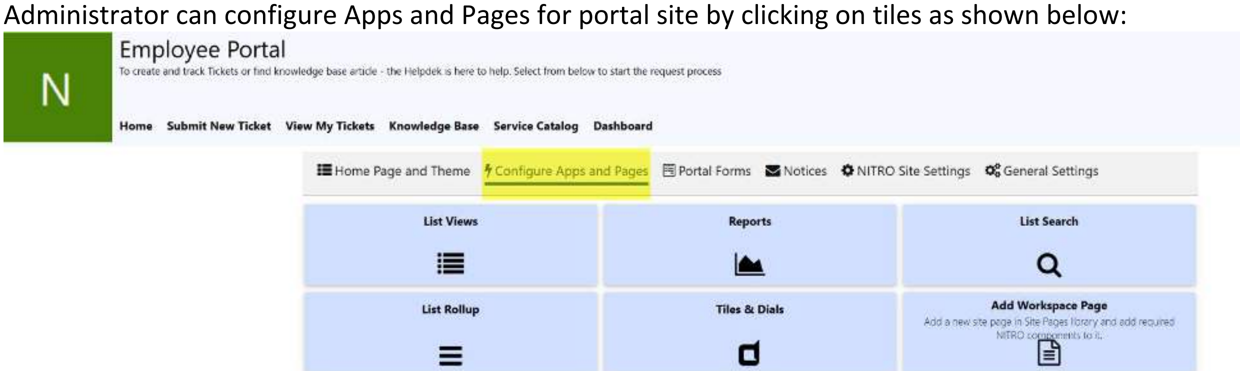
Home Page and Theme



Quick Tickets: Administrator can configure 'Quick Tickets' Tiles by clicking on this tile.
Useful Links: Administrator can configure 'Useful Links' tiles by clicking on this tile.
Site Title, Description and Logo: Administrator can provide Site Title, Description and Site Logo by clicking on this tile.
Branding: Administrator can select theme for site and other site UI settings by clicking on this tile.

Configure Apps and Pages

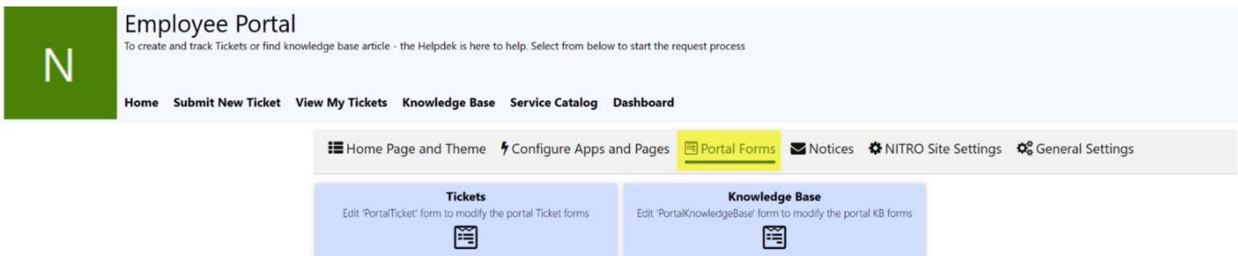
Administrator can configure Apps and Pages for portal site by clicking on tiles as shown below:



List Views: Administrator can configure 'Notices', logged in user 'Open Tickets', 'closed Tickets' by clicking on this tile.
Reports: Administrator can configure reports for Tickets by clicking on this tile.
List Search: Administrator can configure 'List Search' on Tickets by clicking on this tile.
List Rollup: To configure 'List Rollup' click this tile.
Tiles and Dials: By clicking this tile, configure 'Tile and Dials' for portal site.
Add Workspace Page: To add a new site page in Site pages library and add required NITRO components to it, click on this tile.

Portal Forms

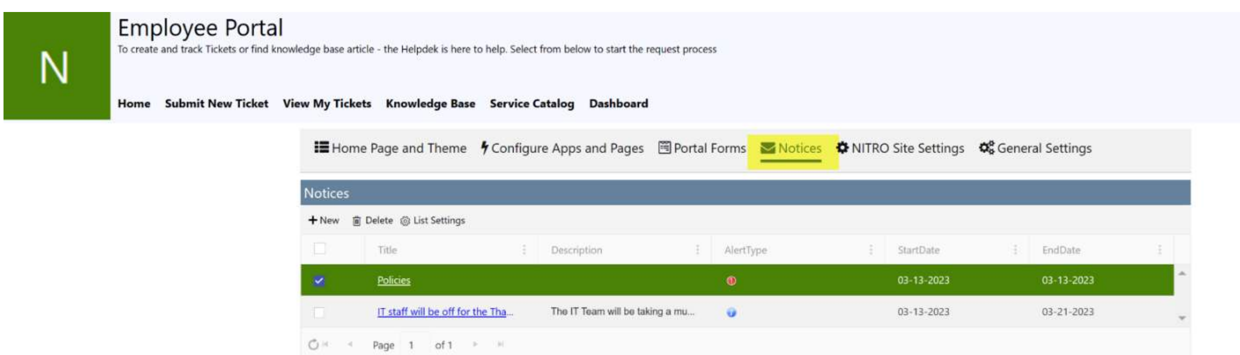
Administrator can configure portal forms by clicking on tiles as shown below:



Tickets: To modify Portal Ticket forms, edit 'PortalTicket' by clicking this tile.
Knowledge Base: To modify portal KB (Knowledge Base) forms, edit 'Portal knowledgebase form by clicking this tile.

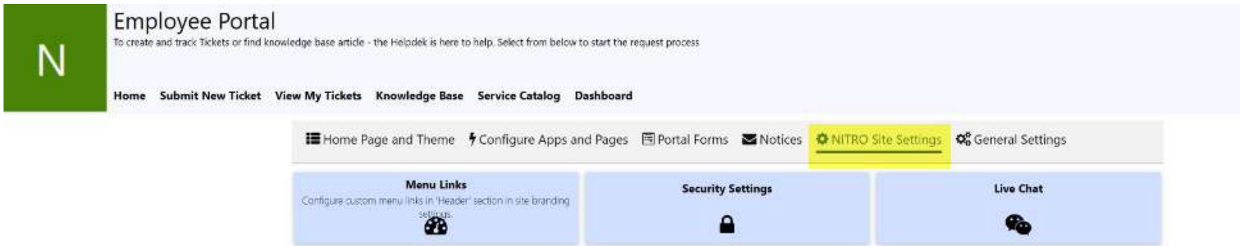
Notices

Administrator can create, edit, and delete Notices as shown below:

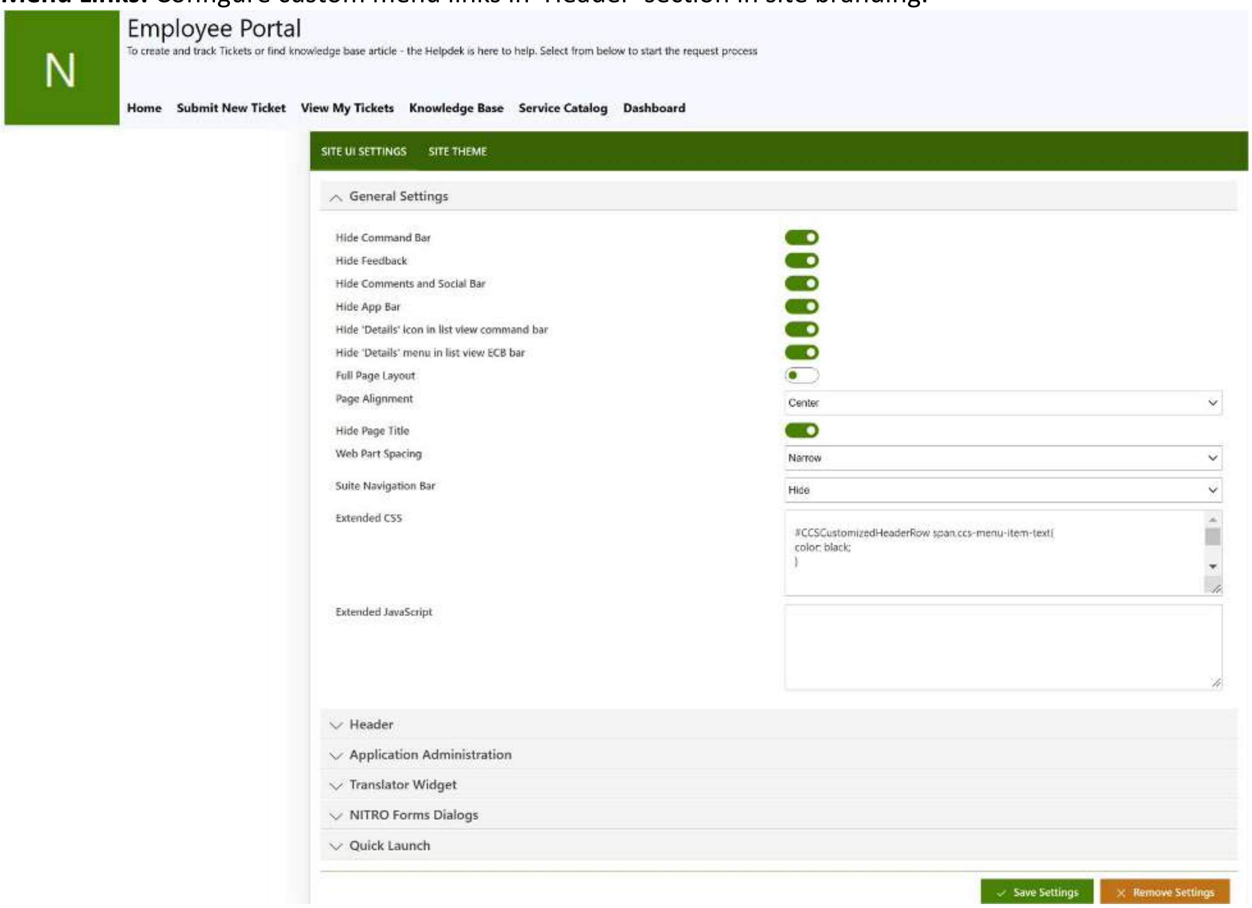


NITRO Site Settings

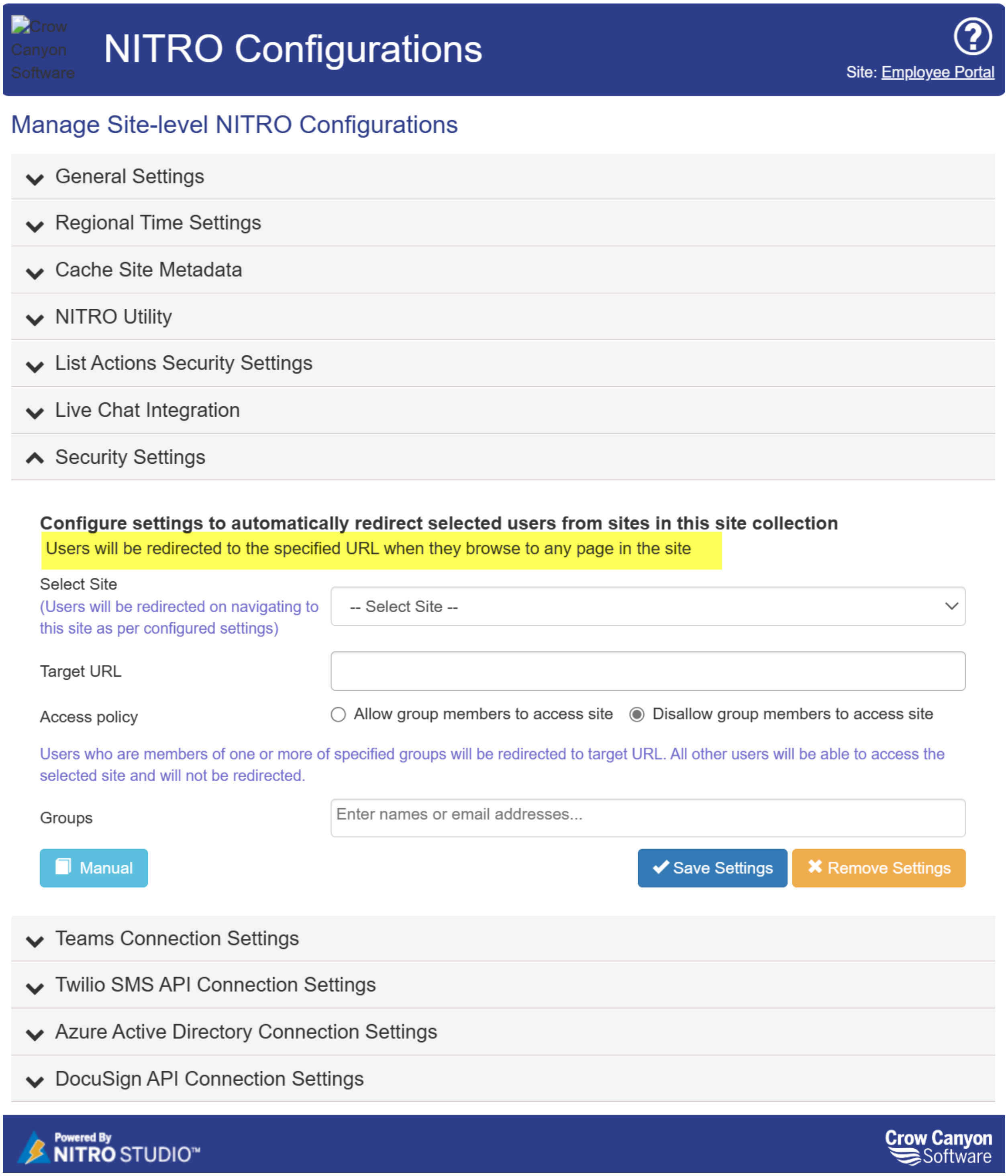
Administrator can configure 'Menu Links', 'Security Settings' and 'Live Chat' by clicking on tiles as shown below:



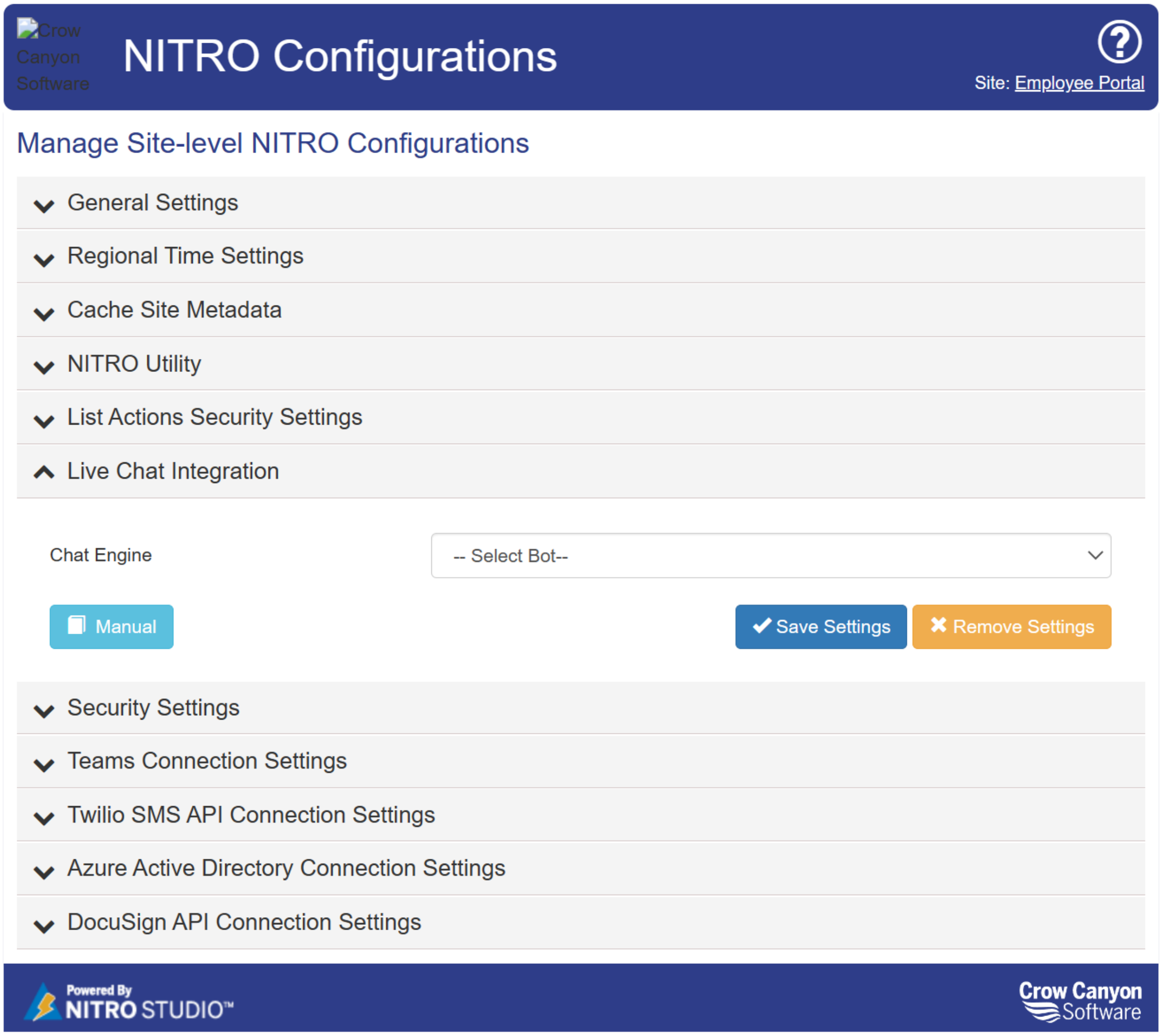
Menu Links: Configure custom menu links in ‘Header' section in site branding.



Security Settings: to configure security settings, click on ‘Security Settings’ tile.

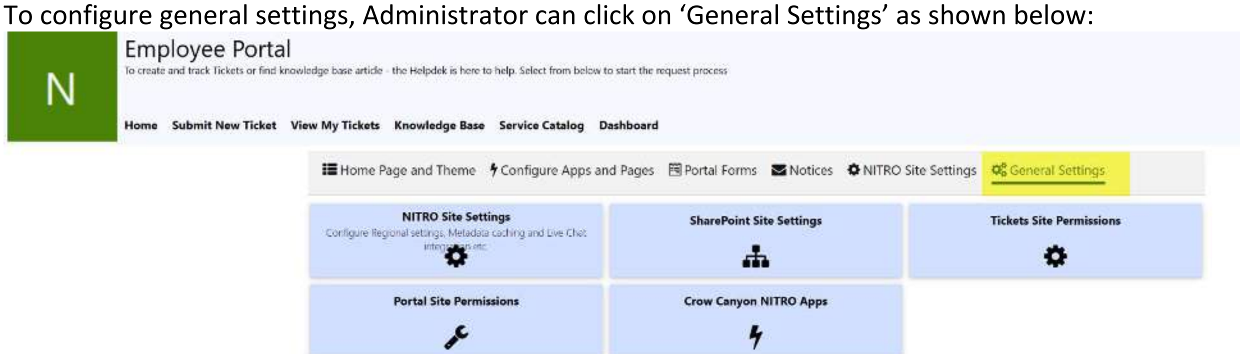


Live Chat: To configure 'Live Chat', click this tile as shown below:

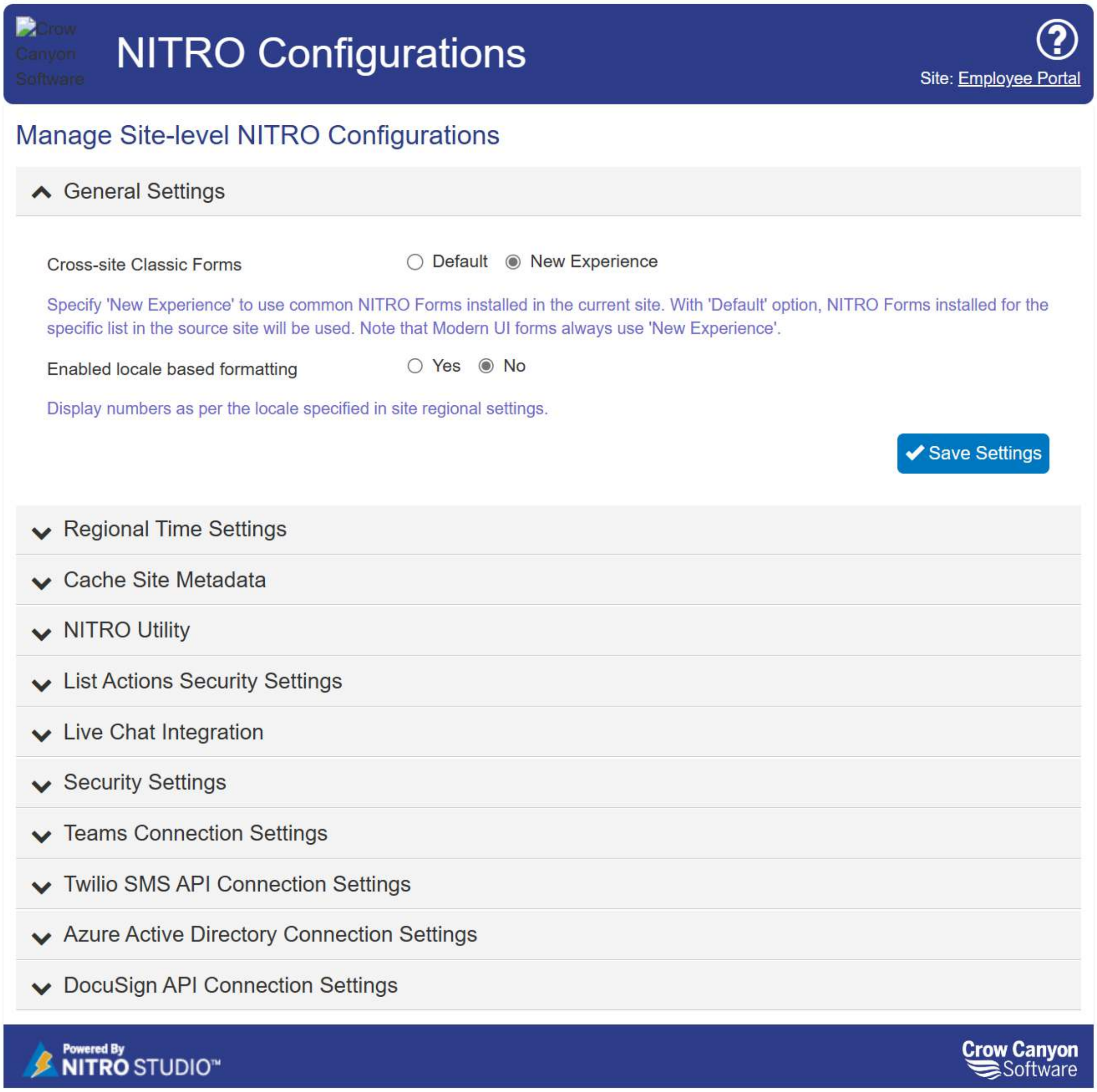


General Settings

To configure general settings, Administrator can click on ‘General Settings’ as shown below:

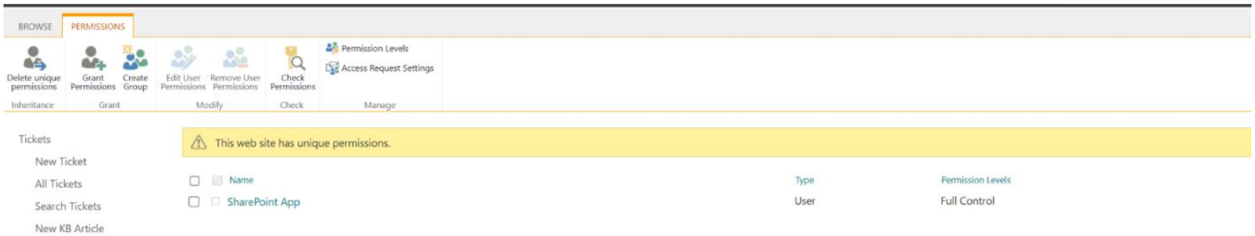


NITRO Site Settings: To configure regional settings, metadata caching, live chat integration etc, click this tile.



SharePoint Site Settings: Click this tile to configure SharePoint Site Settings as shown below

Tickets Site Permissions: To grant permission, delete unique permission and check permission on Tickets list, click this tile.



Portal Site Permissions: to configure Portal site permission, click this tile.
Crow Canyon NITRO Apps: Administrator have access to commonly used NITRO apps in Portal Site.

NITRO Help Desk: Manager Guide

NITRO Help Desk: Manager

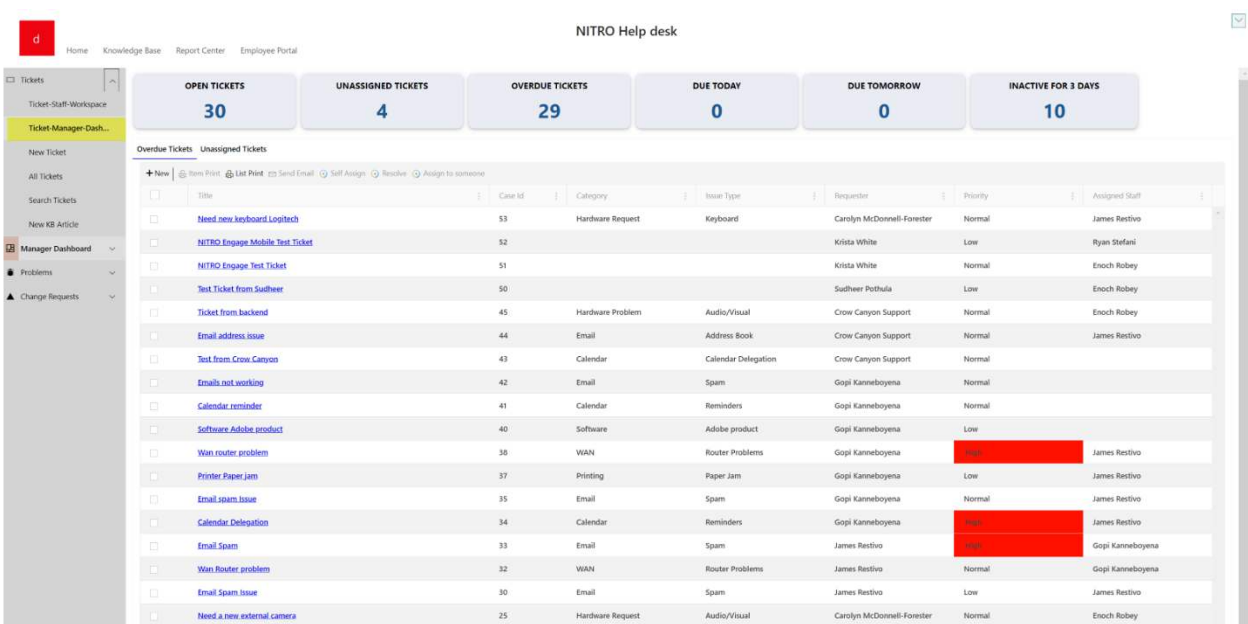
This guide explains how a manager can see the Manager Dashboard, act on overdue tickets, reassign tickets, and much more.

Workspace Pages for Managers

1. Ticket-Manager-Dashboard
2. Problem-Manager-Dashboard
3. CR-Manager-Dashboard

Ticket-Manager-Dashboard

To open Ticket-Manager-Dashboard page follow below steps:
Open Home page and go to Quick Launch in left side -> click Ticket-Manager-Dashboard in 'Tickets' dropdown
This will open a Ticket-Manager-Dashboard page as shown below:



This page has following sections:

- Clickable Tiles that show count of Tickets in different states
- Tabular Views to show Overdue Tickets and Unassigned Tickets

Clickable Tiles across the top show the following information:

- **OPEN TICKETS:** Click this tile to see all the open Tickets.
- **UNASSIGNED TICKETS:** Click this tile to see all unassigned Tickets.
- **OVERDUE TICKETS:** Click this tile to see all overdue Tickets.

- **DUE TODAY:** Click this tile to see the Tickets that are due for today.
- **DUE TOMORROW:** Click this tile to see all the Tickets that are due for tomorrow.
- **INACTIVE FOR 3 DAYS:** Click this tile to see all the Tickets that have not been modified in 3 days.

Tabular Views

In Tabular views we have –

Overdue Tickets

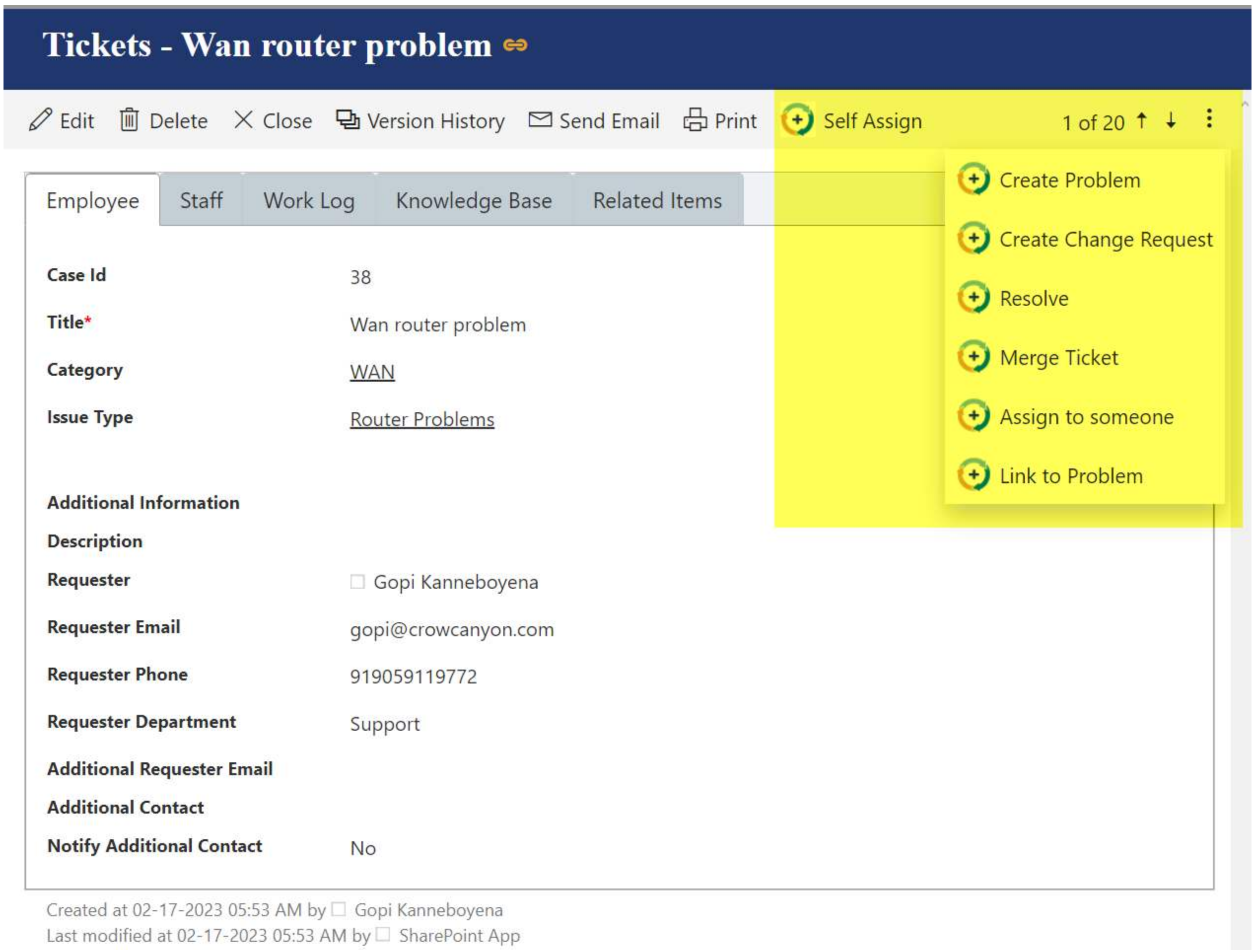
This view will show all the overdue Tickets.

Unassigned Tickets

This view will show all the unassigned Tickets.

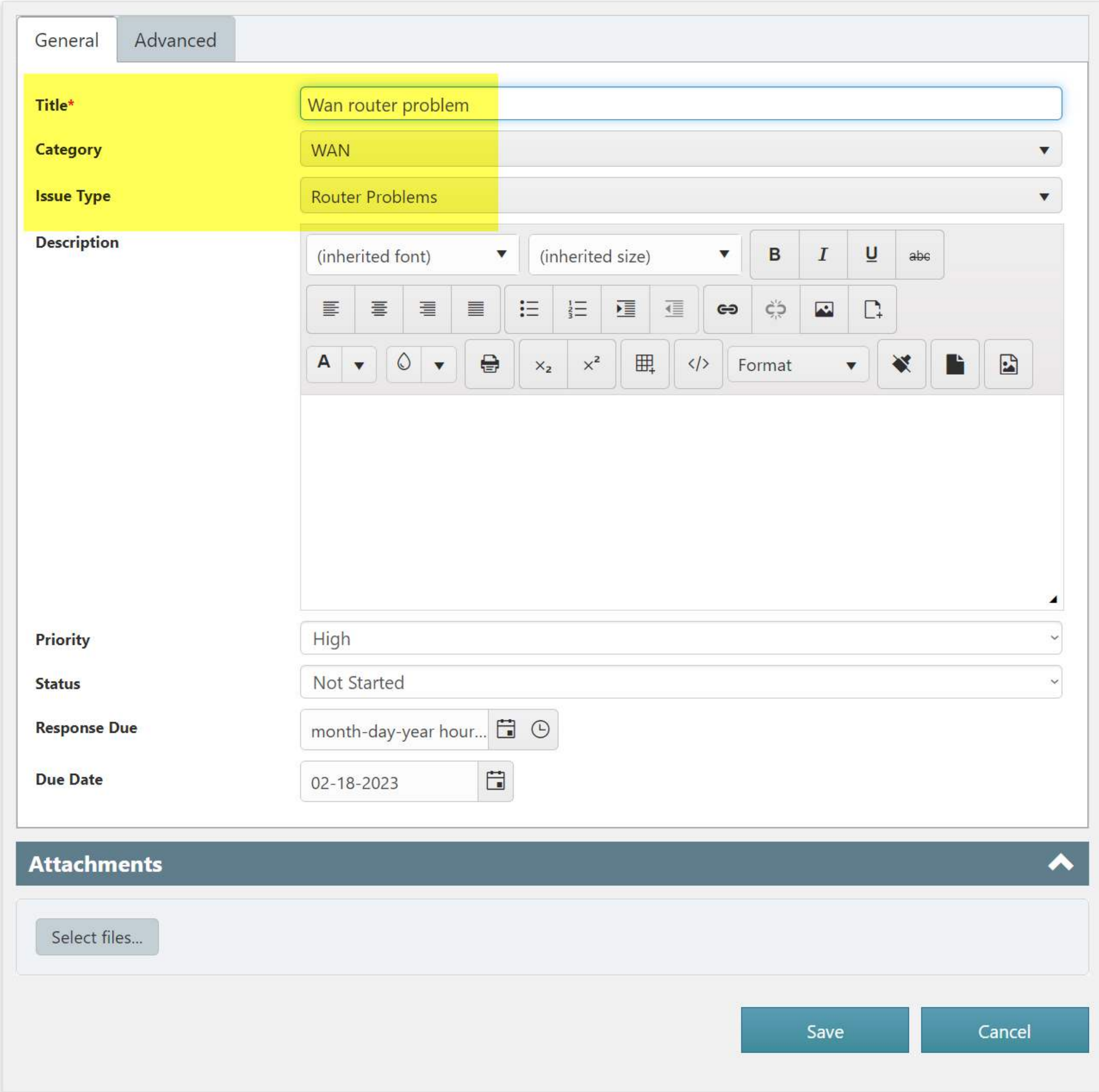
Custom Actions that a manager can perform on Ticket

Managers can act on Tickets either from the tabular view (List View) or by opening a ticket. Custom Actions available for the Manager to perform on a Ticket are shown below:

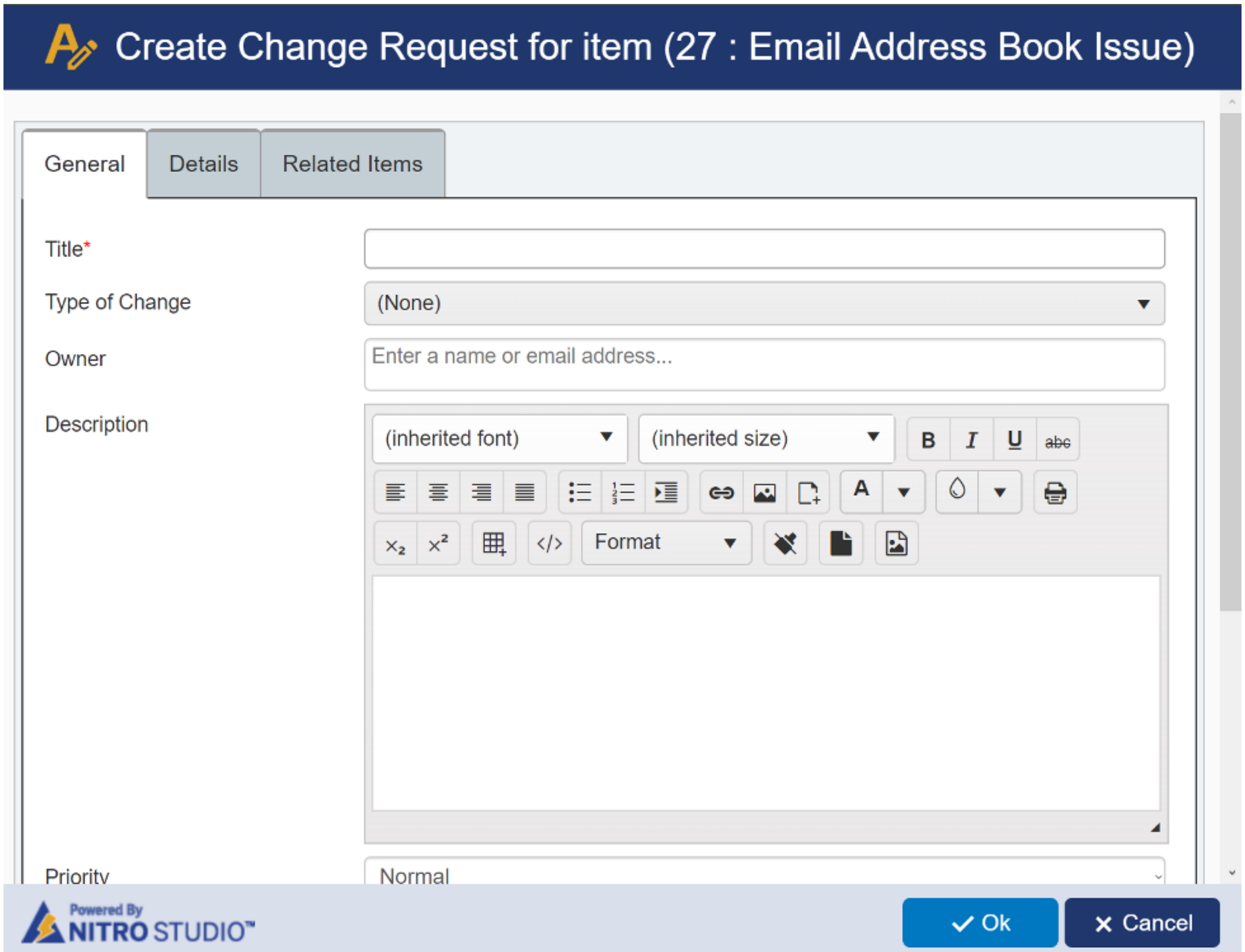


- **Self Assign:** Manager can Assign a Ticket to themselves by clicking "Self Assign" action Available in the Ticket.
- **Create Problem:** Manager can create a problem in the Problems list by clicking the "Create Problem" action. A form will open and, in this form, 'Title', 'Category' and 'Issue Type'

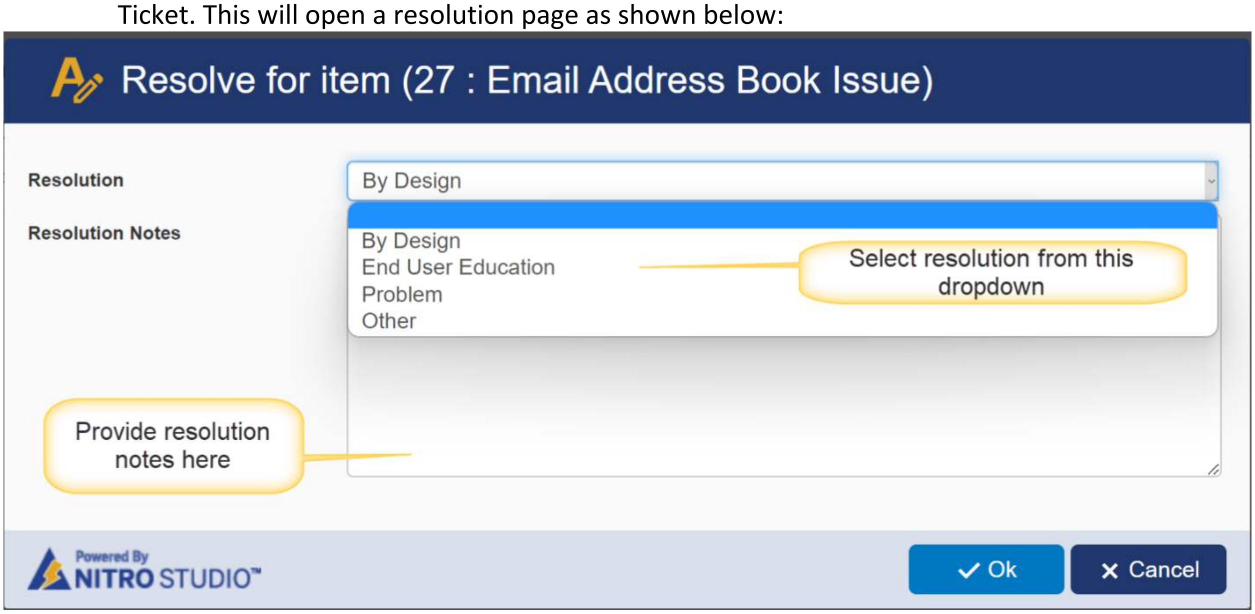
columns will automatically populate from the Ticket on which custom action has been invoked. Enter additional details and click the ‘Save’ button to create a problem as shown below:



- **Create Change Request:** Manager can create a Change Request in the Change Requests list for a Ticket By clicking “Create Change Request” action. A Change Request form opens in which Manager can fill details as shown below. On submission it creates a Change Request.

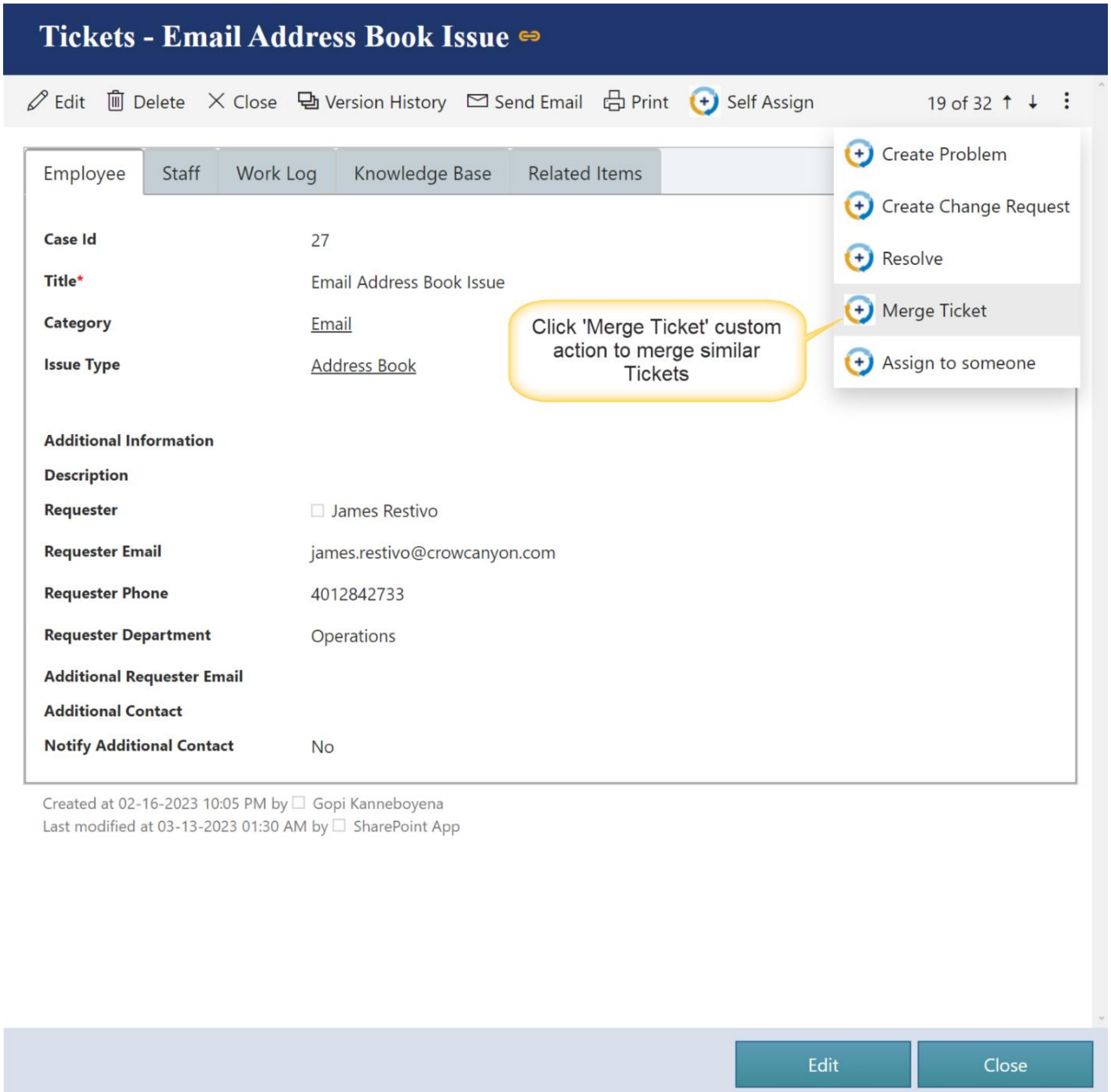


- **Resolve:** Manager can resolve the Ticket by clicking "Resolve" action available in the Ticket. This will open a resolution page as shown below:

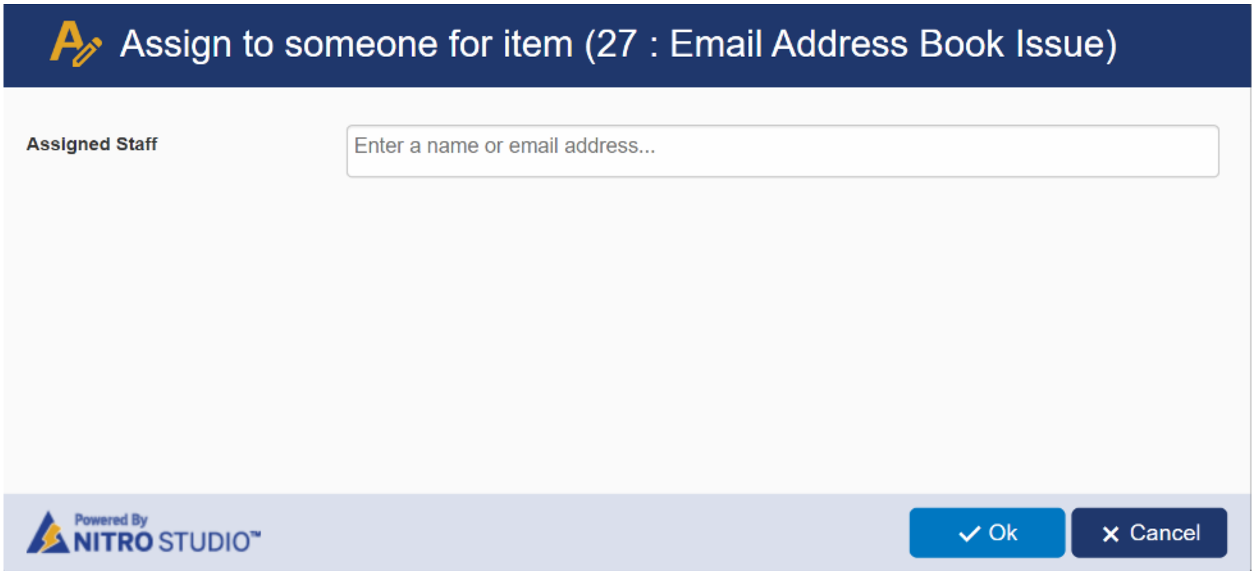


Submit after providing a "Resolution" and "Resolution Notes" to resolve a Ticket.

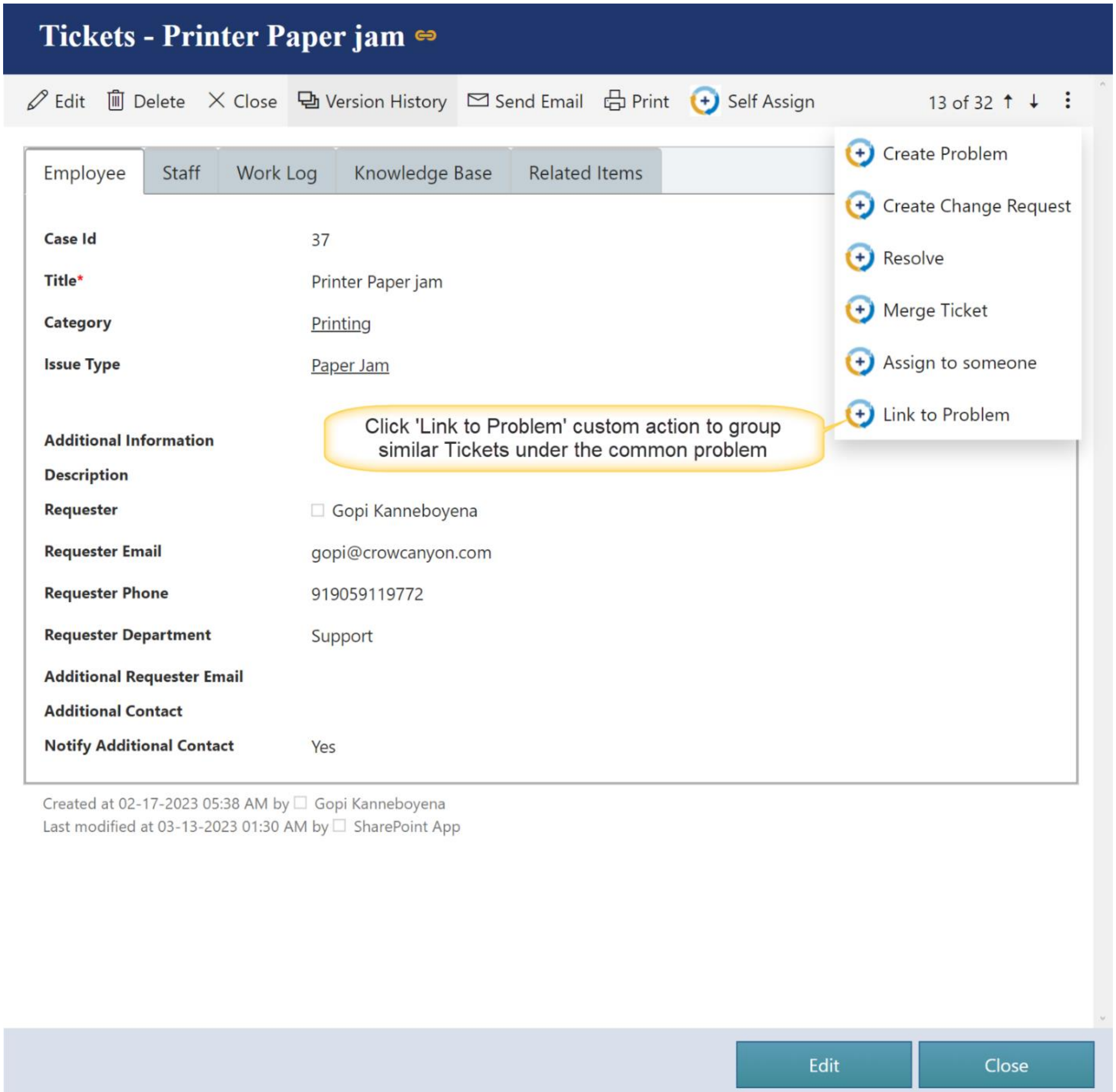
- **Merge Tickets:** Manager can merge Tickets when same user submits multiple Tickets for the same issue or different users submit Ticket for the same issue.



- **Assign to someone:** Manager can Assign Ticket to someone else by clicking “Assign to someone” action available in the Ticket. Manager will need to provide “Assigned Staff” name or email address to assign the Ticket as shown below:



- **Link to Problem:** Manager can link open Tickets to problems that have been already identified. This will help us in grouping of similar Tickets under the common problem.



Other Actions that a manager can perform on a Ticket are:

- **New**: Manager can create a new Ticket by clicking ‘New’ button available in upper left corner of ‘My Tickets’ views.
- **Item Print**: Manager can print an item by selecting the item and clicking on ‘Item Print’ button.
- **List Print:** Manager can print the list by clicking ‘List Print’ button available in the ribbon.
- **Send Mail**: Manager can also send mail by clicking ‘Send Mail’ button available in the item ribbon.
- **Delete**: Manager can delete a Ticket by selecting it and clicking ‘Delete’ button.

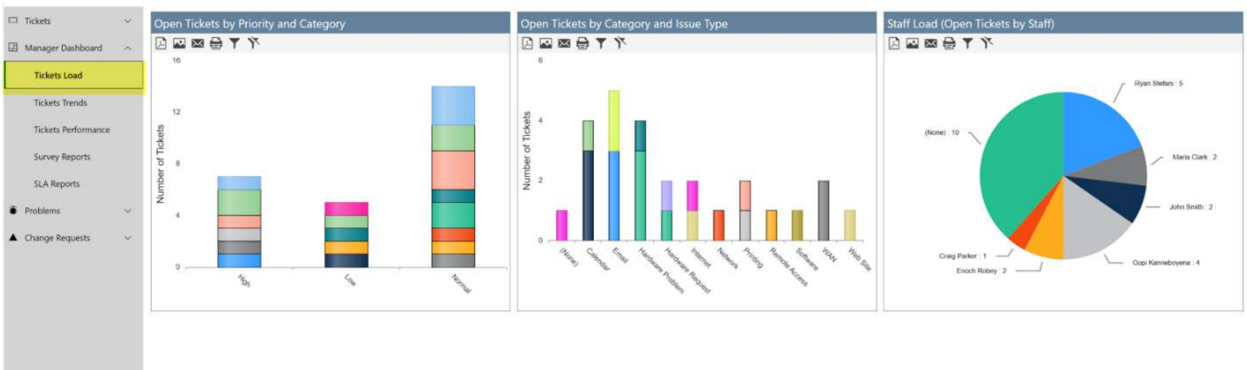
Graphical Reports

Manager Dashboard can also access additional pages showing detailed reports
In Home page go to left side Quick Launch -> expand Manager Dashboard -> this will show below pages where Reports are configured for different ticket states.

1. Tickets Load
2. Tickets Trends
3. Tickets Performance
4. Survey Reports
5. SLA Reports

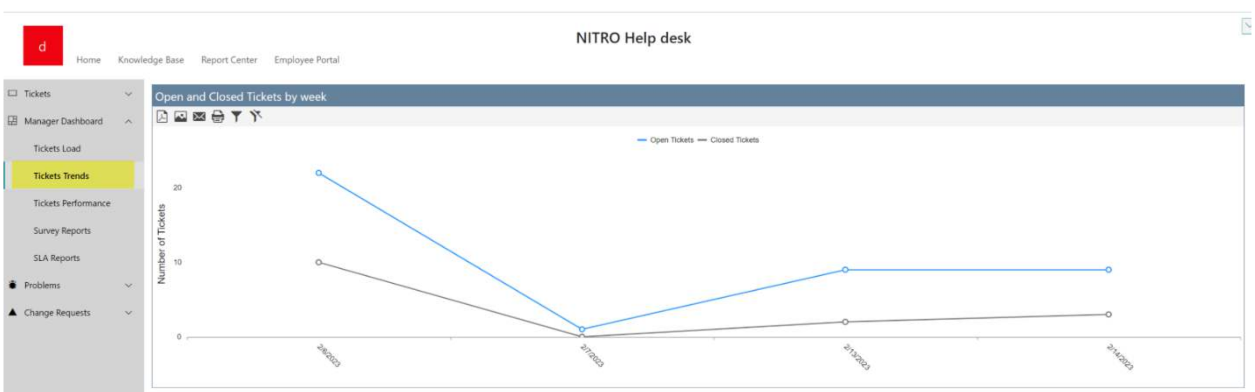
Tickets Load: This page shows the Manager how tickets are distributed by different parameters as listed below

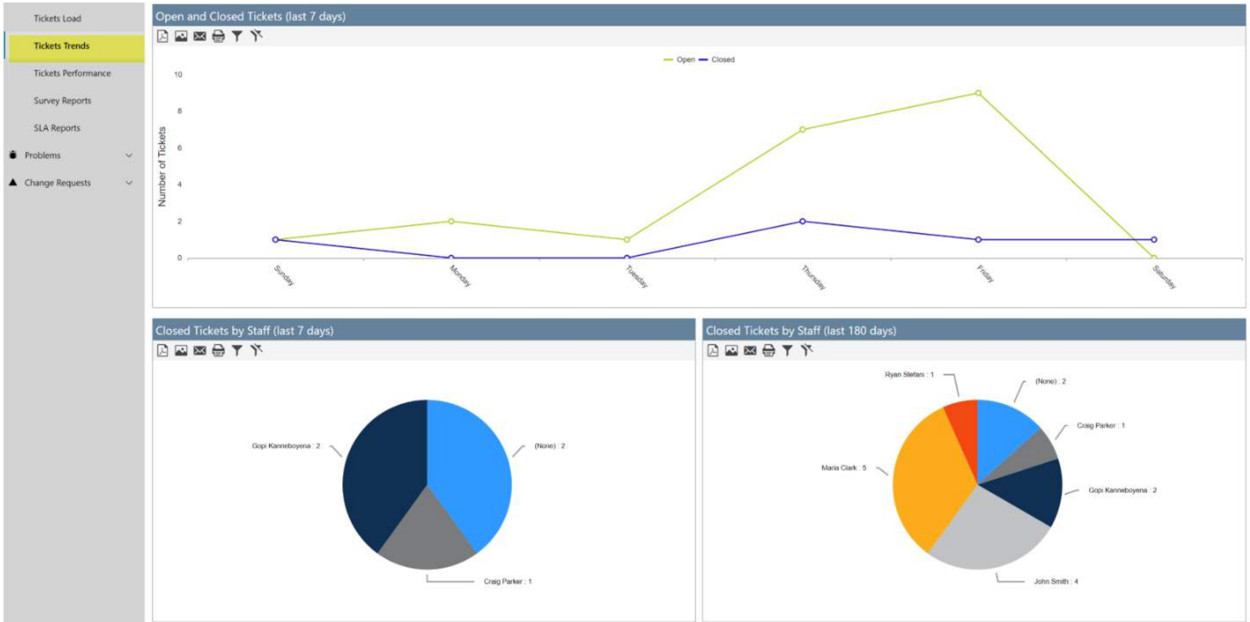
- Open Tickets by Priority and Category
- Open Tickets by Category and Issue Type
- Staff Load (Open Tickets by Staff)



Tickets Trends: This page shows the Manager various trends regarding Tickets as listed below

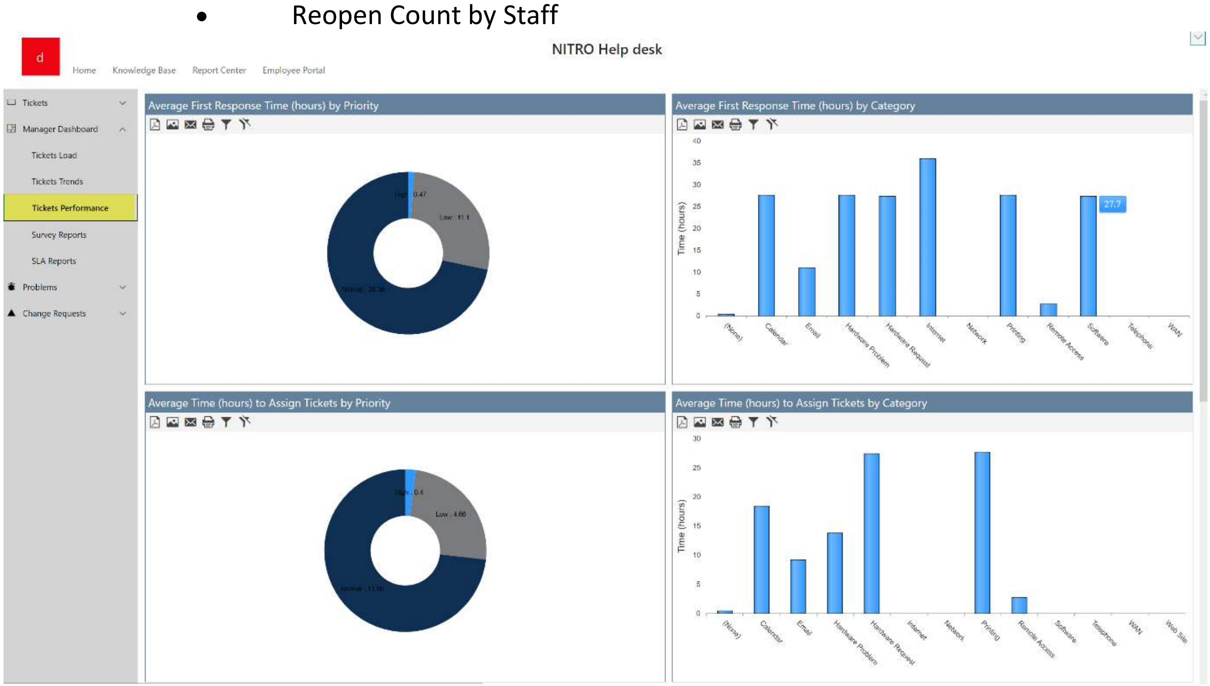
- Open and Closed Tickets by week
- Open and Closed Tickets (last 7 days)
- Closed Tickets by Staff (last 7 days)
- Closed Tickets by Staff (last 180 days)





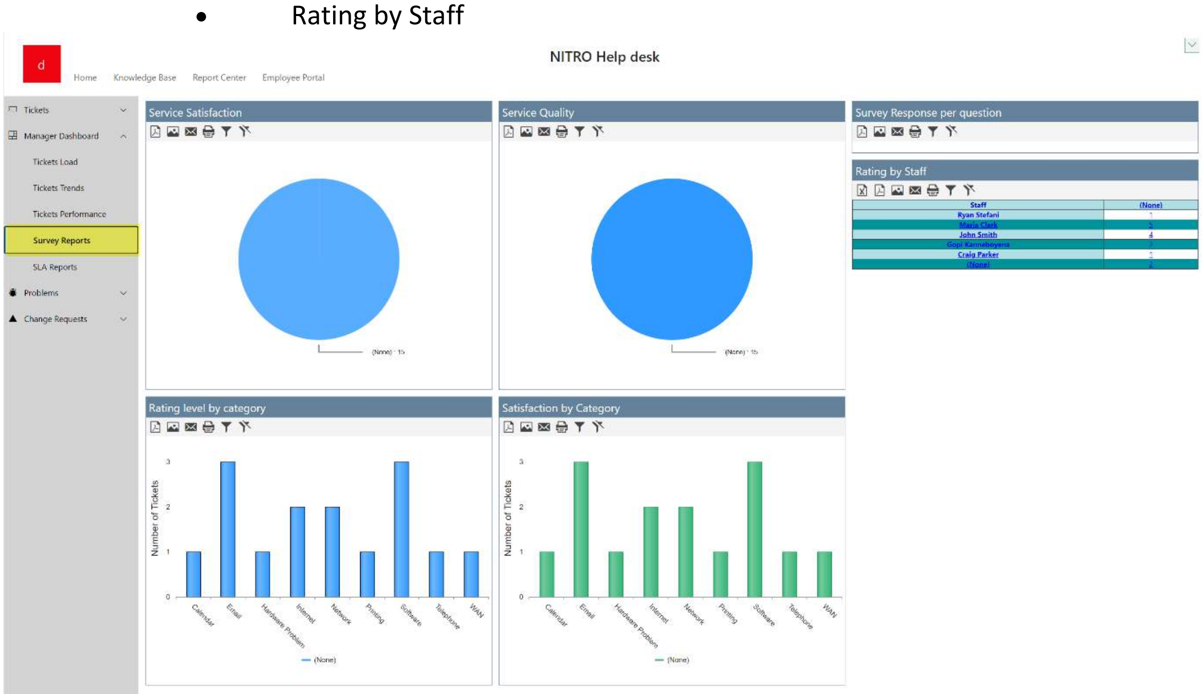
Tickets Performance: This page shows the Manager, performance of staff on Tickets based on various parameters as listed below

- Average First Response Time (hours) by Priority
- Average First Response Time (hours) by Category
- Average Time(hours) to Assign Tickets by Priority
- Average Time(hours) to Assign Tickets by Category
- Average Time(hours) to Resolve Tickets by Priority
- Average Time(hours) to Resolve Tickets by Category
- Average Time(hours) to Taken by Staff to Resolve Tickets
- Reopen Count by Staff



Survey Reports: This page shows the Manager various survey reports as listed below

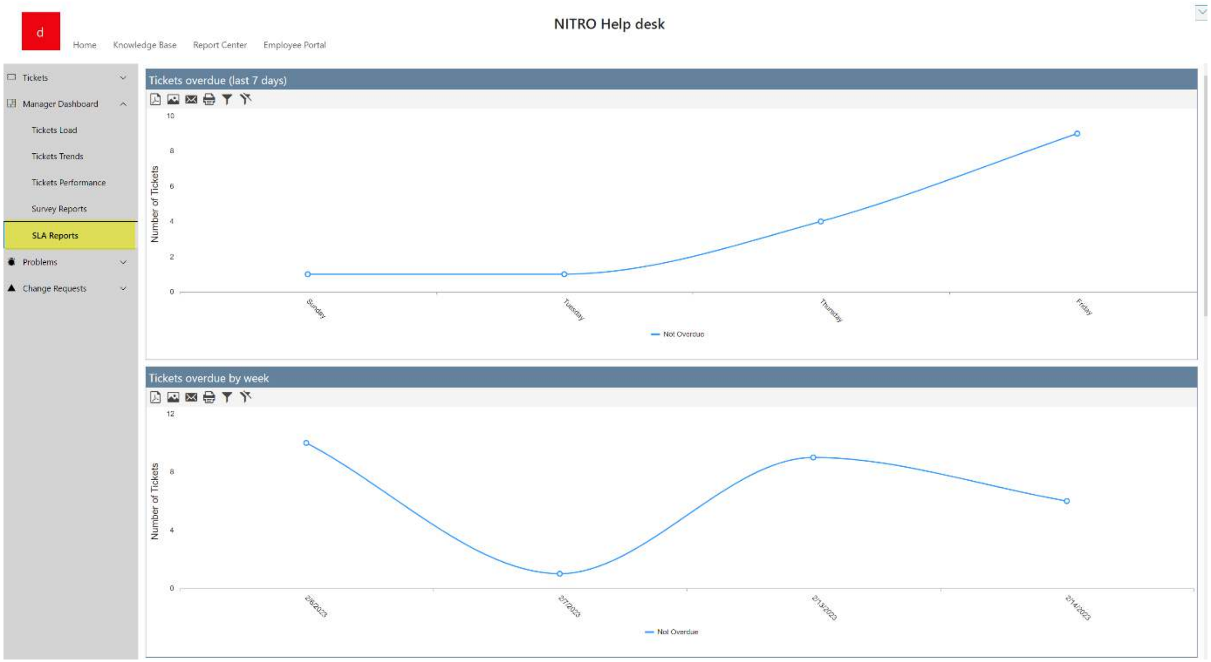
- Service Satisfaction
- Service Quality
- Rating Level by Category
- Satisfaction by Category
- Survey Response per question
- Rating by Staff

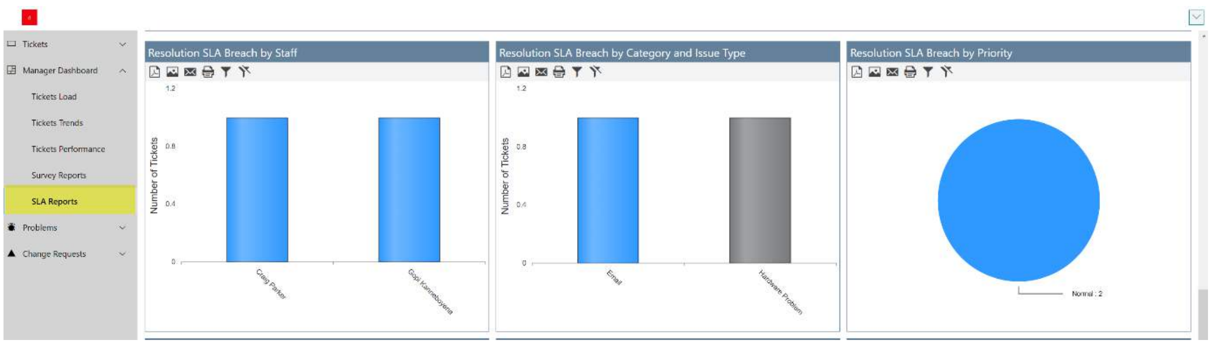


SLA Reports: This page shows the Manager SLAs reports under below mentioned categories

- Tickets Overdue (last 7 days)
- Tickets Overdue by week
- Resolution SLA Breach by Staff

- Resolution SLA Breach by Category and Issue Type
- Resolution SLA Breach by Priority
- Response SLA Breach by Staff
- Response SLA Breach by Category and Issue Type
- Response SLA Breach by Priority
- Resolution SLA Status
- Response SLA Status

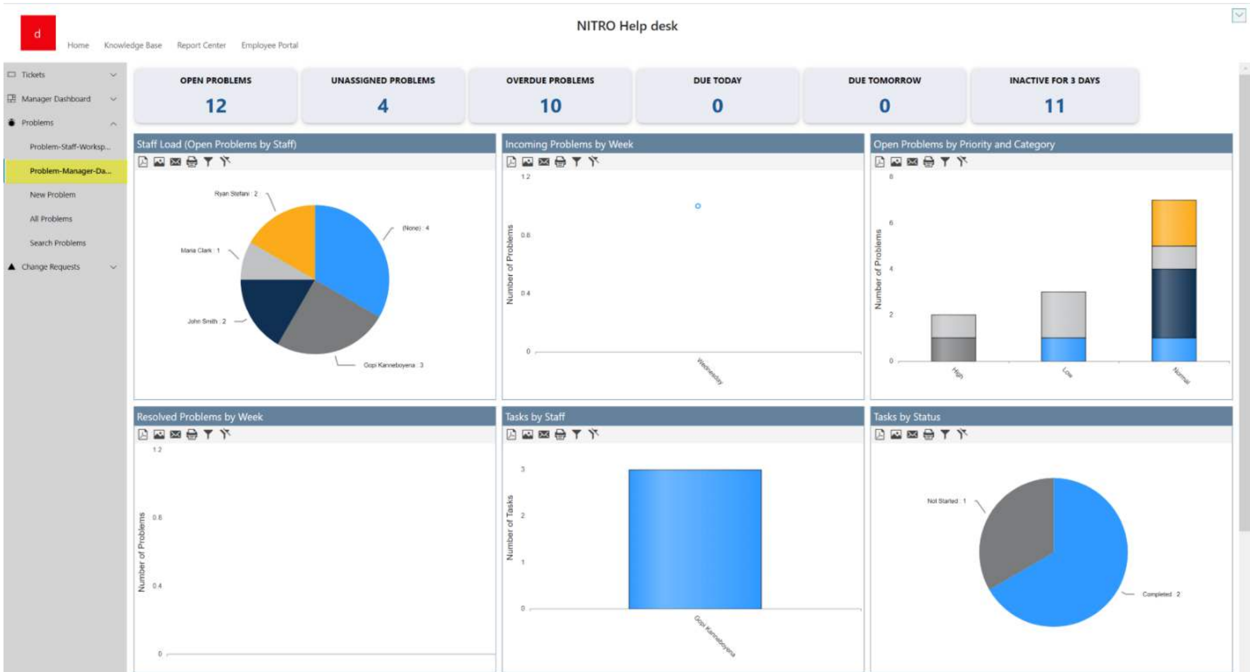


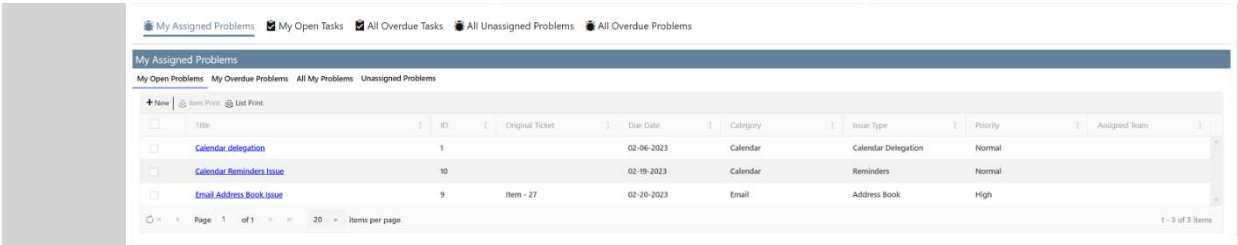


Problem-Manager-Dashboard

To open Problem-Manager-Dashboard page follow below steps:
Open Home page and go to Quick Launch in left side -> click Problem-Manager-Dashboard in 'Problems' dropdown

This will open a Problem-Manager-Dashboard page as shown below:





This page has following sections:

- Clickable Tiles that show count of Problems in different states
- Graphical Reports
- Tabular views to show My Assigned Problems, My Open Tasks and All Overdue Tasks etc.

Clickable Tiles across the top show the following information:

- **OPEN PROBLEMS:** Click this tile to see all the assigned open problems.
- **UNASSIGNED PROBLEMS:** Click this tile to see all unassigned problems.
- **OVERDUE PROBLEMS:** Click this tile to see all overdue problems.
- **DUE TODAY:** Click this tile to see the problems that are due for today.
- **DUE TOMORROW:** Click this tile to see all the problems that are due for tomorrow.
- **INACTIVE FOR 3 DAYS:** Click this tile to see all the problems that are inactive from 3 days.

Graphical Reports - Manager Dashboard can also access additional pages showing detailed reports

Problem Manager Dashboard page shows the below reports for problem

- Staff Load (Open Problem by Staff)
- Incoming Problems by week
- Open Problems by Priority and Category
- Resolved Problems by week
- Tasks by Staff
- Tasks by Status

Tabular Views

Below views are configured in Tabular view of Problem Manager Dashboard

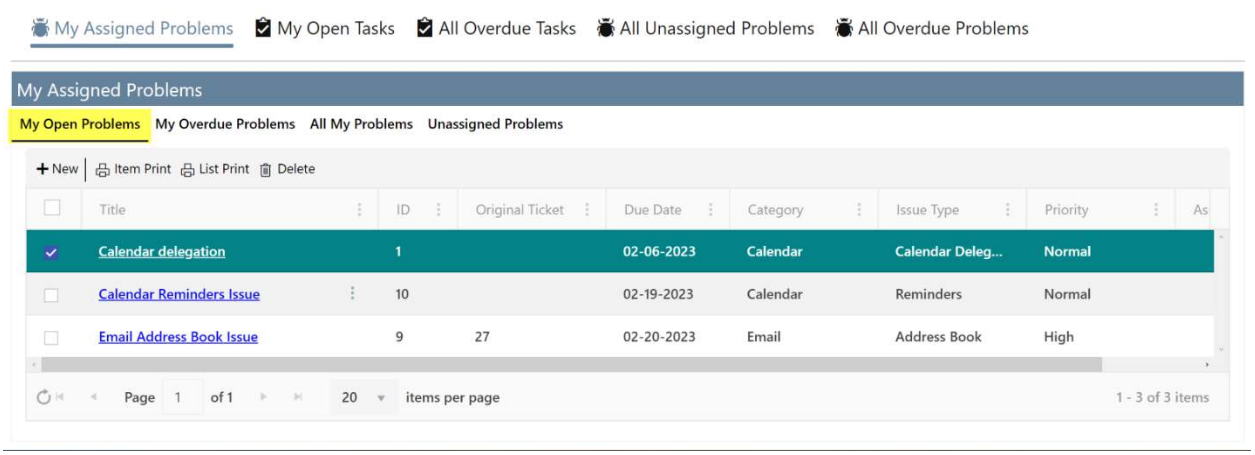
1. My Assigned Problems
2. My Open Tasks
3. All Overdue Tasks
4. All Unassigned Problems
5. All Overdue Problems

My Assigned Problems –

In My Assigned Problems we have

1. MY Open Problems

To view all Open Problems, click ‘My Open Problem’ as shown below:

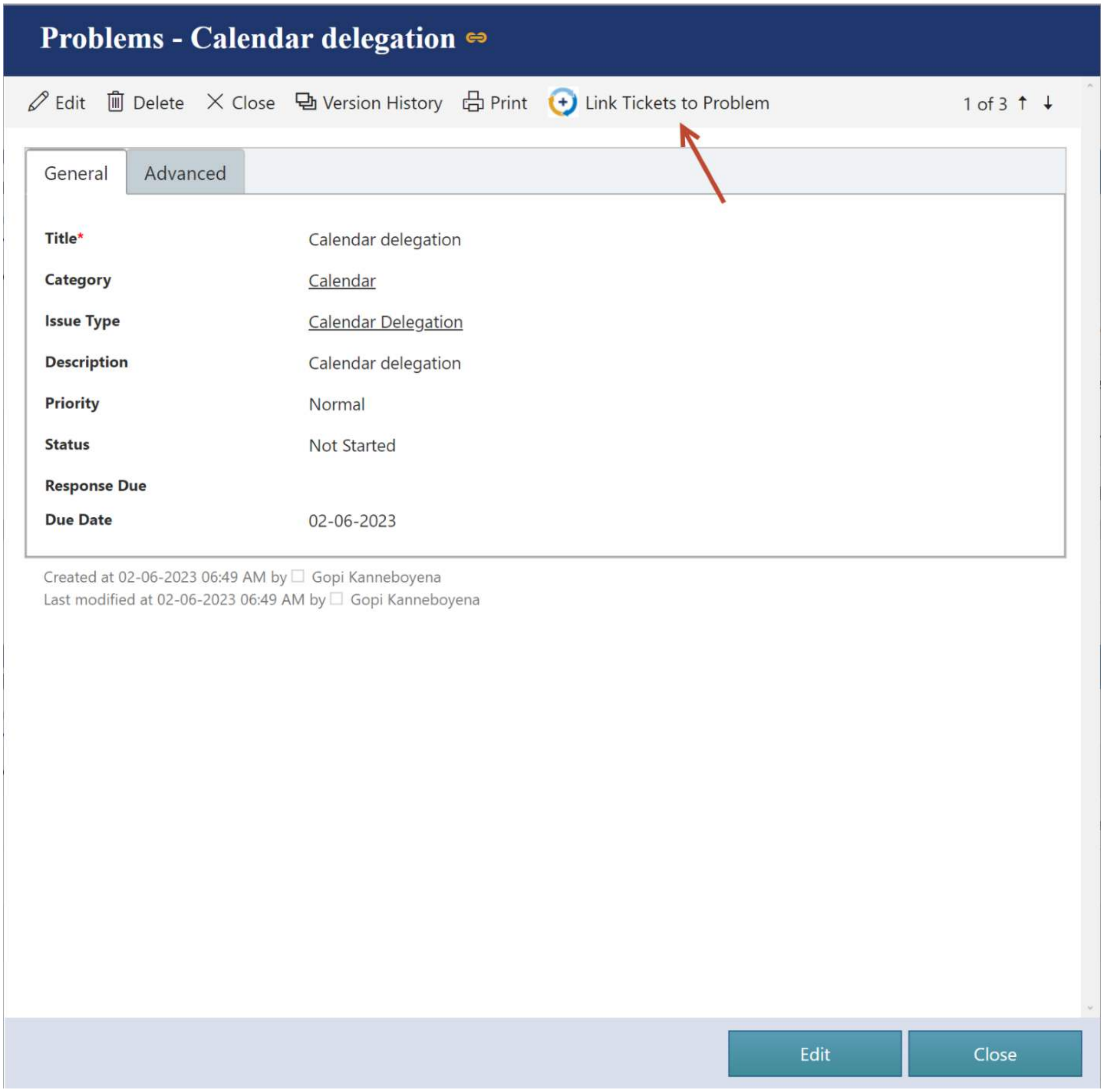


Manager can perform ‘Link Tickets to Problem’ action on ‘Problem’ by opening the problem.

- **Link Tickets to Problem:** Manager can link open Tickets to problems that have been already identified. This will help us in grouping of similar Tickets under the common problem.

Open a Problem by clicking on it.

Managers can act on problems either from the tabular view (List View) or by opening a Problem. Custom Actions available for the Manager to perform on a Problem are shown below:



- **Link Tickets to Problem:**
  - This custom action is configured on 'Problems' list and will be invoked on the Problem with which Tickets needs to be linked.
  - Custom Action is only visible in the Display form of the Problem. It will not show up in the Edit form of the Problem
  - When action is invoked, it will prompt the user to select the 'Open Tickets'.
  - Select single or multiple Tickets to link with Problem.
  - Selected Tickets will be linked to Problem on which custom action is invoked.

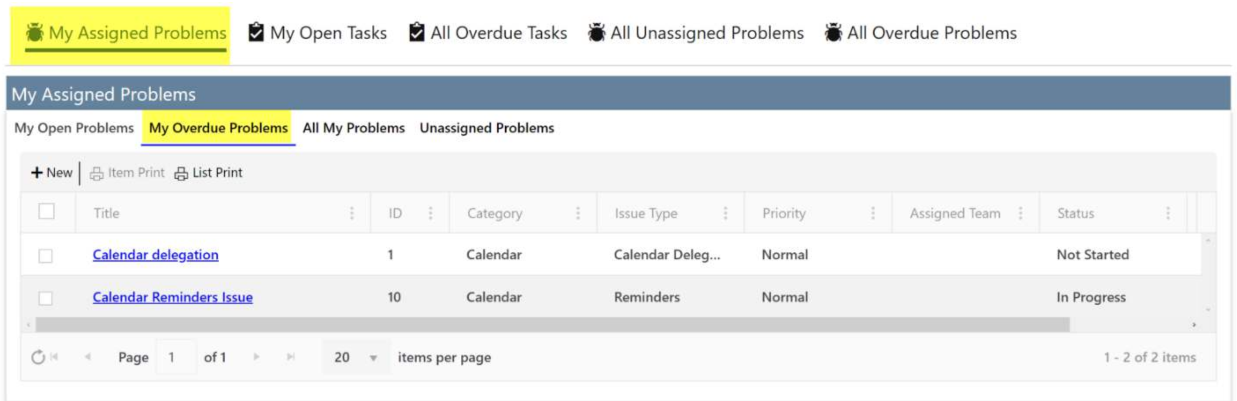
Other Actions that a manager can perform on a Problems are:

- **New**: Manager can create new Problem by clicking 'New' button available in upper left corner of 'My Tickets' views.

- **Item Print**: Manager can print an item by selecting the item and clicking on ‘Item Print’ button.
- **List Print:** Manager can print the list by clicking ‘List Print’ button available in the ribbon.
- **Delete**: Manager can delete a Problem by selecting it and clicking ‘Delete’ button.

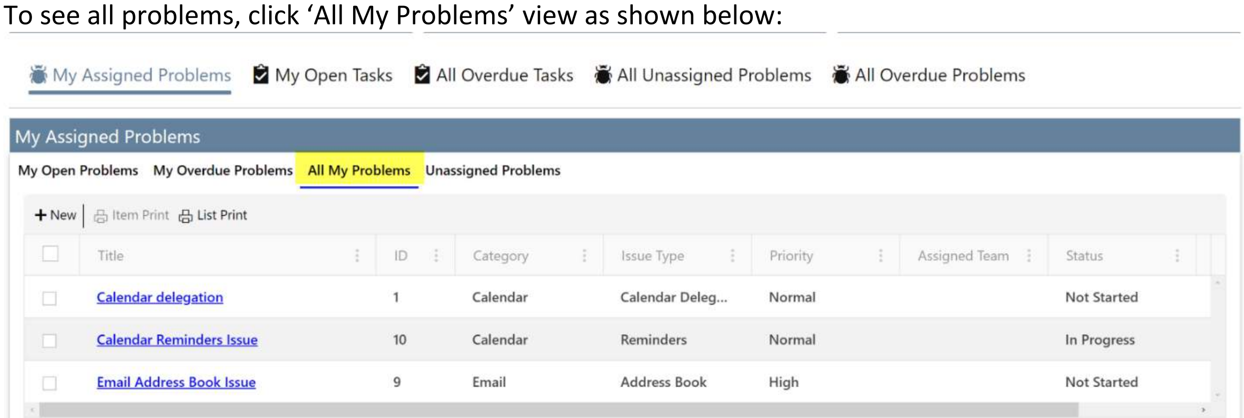
2. My Overdue Problems

To view overdue Problems, click “My Overdue Problems” as shown below:



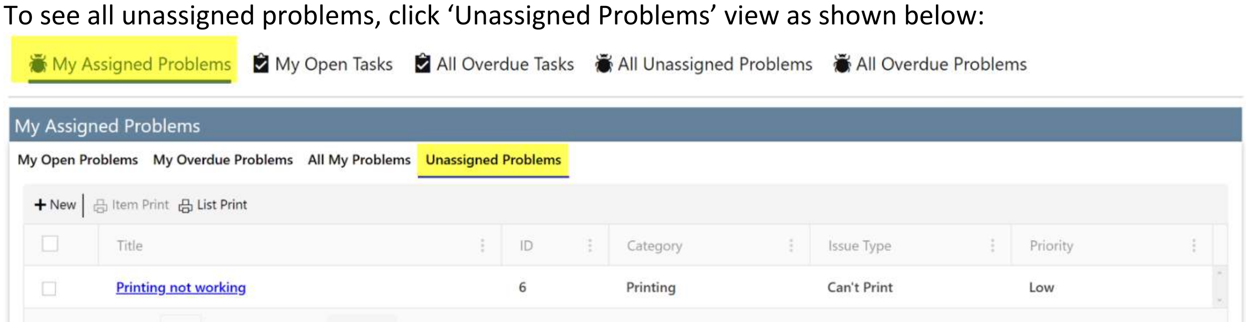
3. All My Problems

To see all problems, click ‘All My Problems’ view as shown below:



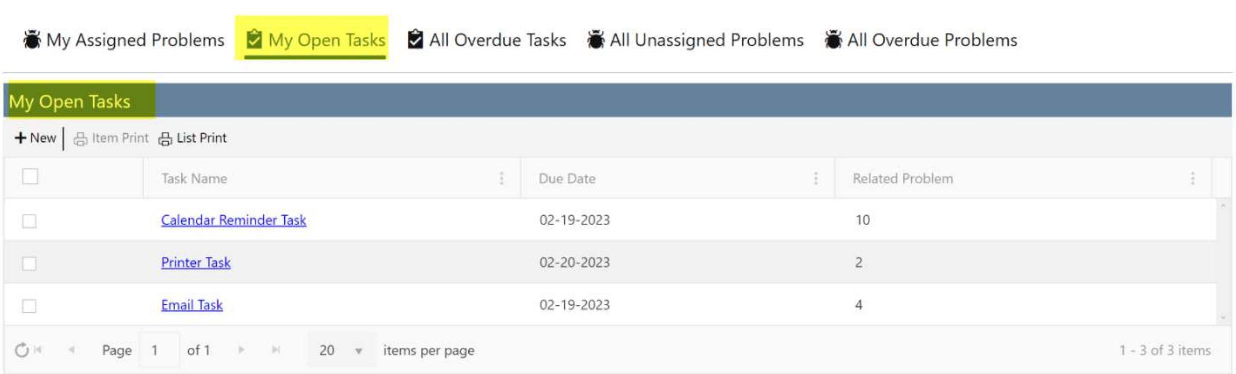
4. Unassigned Problems

To see all unassigned problems, click ‘Unassigned Problems’ view as shown below:



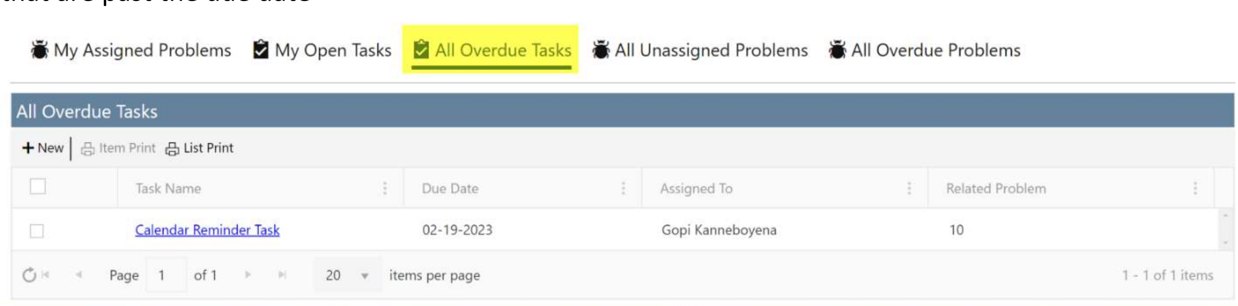
My Open Tasks

To see all open tasks, click ‘My Open Tasks’ view as shown below:



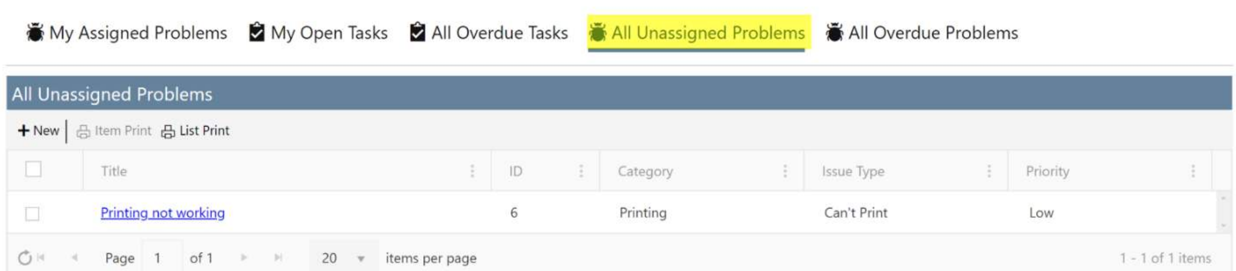
All Overdue Tasks

To see all overdue tasks, click ‘All Overdue Tasks’ view as shown below: This view will show all the tasks that are past the due date



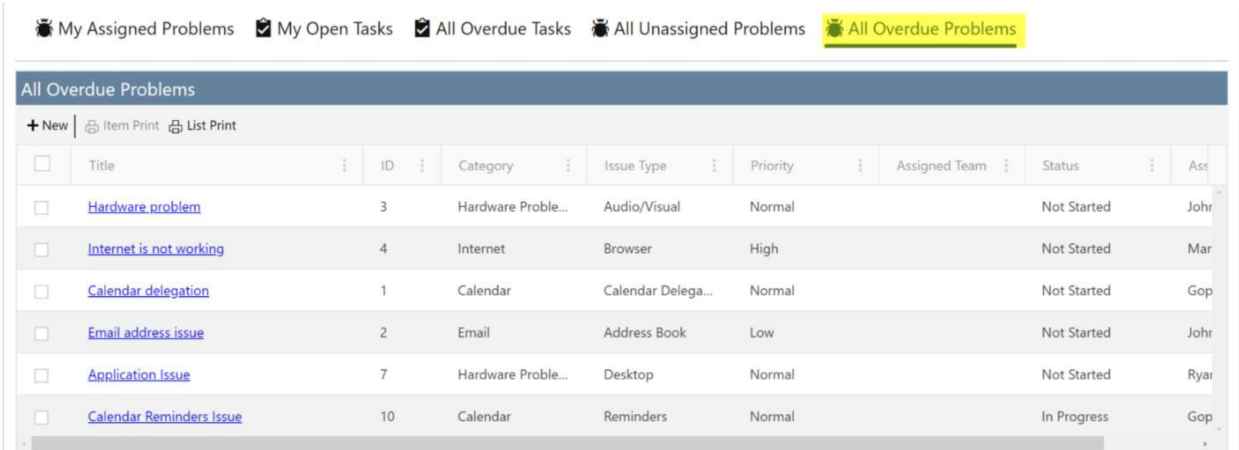
All Unassigned Problems

To see all unassigned problems, click ‘All Unassigned Problems’ view.



All Overdue Problems

To see all overdue problems, click ‘All Overdue Problems’ view.

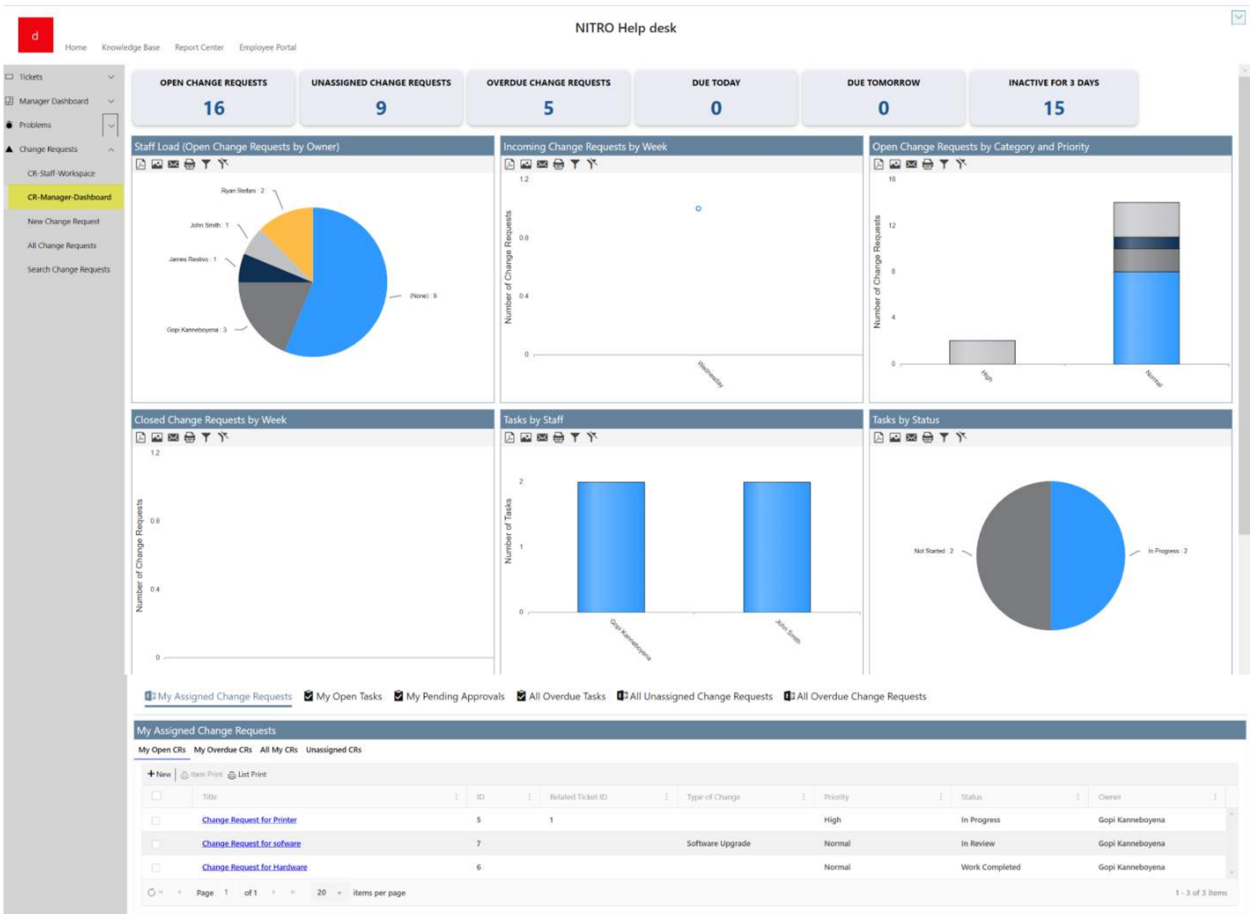


Title	ID	Category	Issue Type	Priority	Assigned Team	Status	Ass
Hardware problem	3	Hardware Proble...	Audio/Visual	Normal		Not Started	Johr
Internet is not working	4	Internet	Browser	High		Not Started	Mar
Calendar delegation	1	Calendar	Calendar Delega...	Normal		Not Started	Gop
Email address issue	2	Email	Address Book	Low		Not Started	Johr
Application Issue	7	Hardware Proble...	Desktop	Normal		Not Started	Ryar
Calendar Reminders Issue	10	Calendar	Reminders	Normal		In Progress	Gop

CR-Manager-Dashboard

To open CR-Manager-Dashboard page follow below steps:
Open Home page and go to Quick Launch in left side -> click CR-Manager-Dashboard in ‘Change Requests’ dropdown

This will open a CR-Manager-Dashboard page as shown below:



This page has following sections:

- Clickable Tiles that show count of Change Requests in different states
- Graphical Reports
- Tabular views to show My Assigned Change Requests, My Open Tasks and My Pending Approvals etc.

Clickable Tiles across the top show the following information:

- **OPEN CHANGE REQUESTS:** Click this tile to see all open change requests.
- **UNASSIGNED CHANGE REQUESTS:** Click this tile to see all unassigned Change Requests.
- **OVERDUE CHANGE REQUESTS:** Click this tile to see all overdue Change Requests.
- **DUE TODAY:** Click this tile to see the Change Requests that are due for today.
- **DUE TOMORROW:** Click this tile to see all the Change Requests that are due for tomorrow.
- **INACTIVE FOR 3 DAYS:** Click this tile to see all the Change Requests that are inactive from 3 days.

Graphical Reports - Manager Dashboard can also access additional pages showing detailed reports

Change Requests Manager Dashboard page shows the below reports for problem

- Staff Load (Open Change Requests by Owner)
- Incoming Change Requests by week

- Open Change Requests by Priority and Category
- Closed Change Requests by week
- Tasks by Staff
- Tasks by Status

Tabular Views

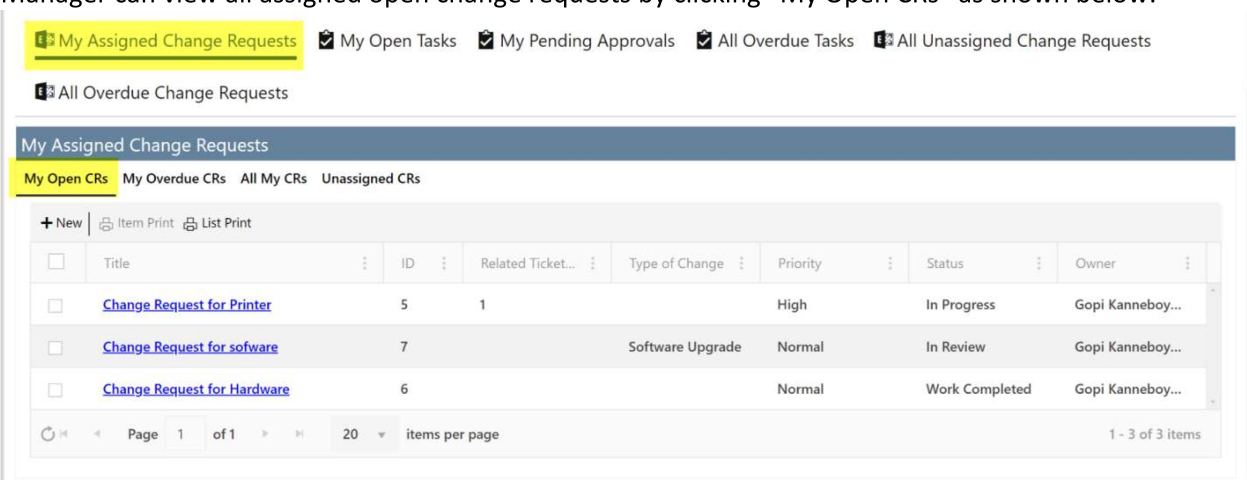
Below views are configured in Tabular view of Problem Manager Dashboard

1. My Assigned Change Requests
2. My Open Tasks
3. My Pending Approvals
4. All Overdue Tasks
5. All Unassigned Change Requests
6. All Overdue Change Requests

My Assigned Change Requests

1. My Open CRs

Manager can view all assigned open change requests by clicking “My Open CRs” as shown below:



To create a new change request, click ‘New’ button available Upper right corner. A new change request undergoes an approval process.
Change Request Approval Process typically goes through below mentioned steps

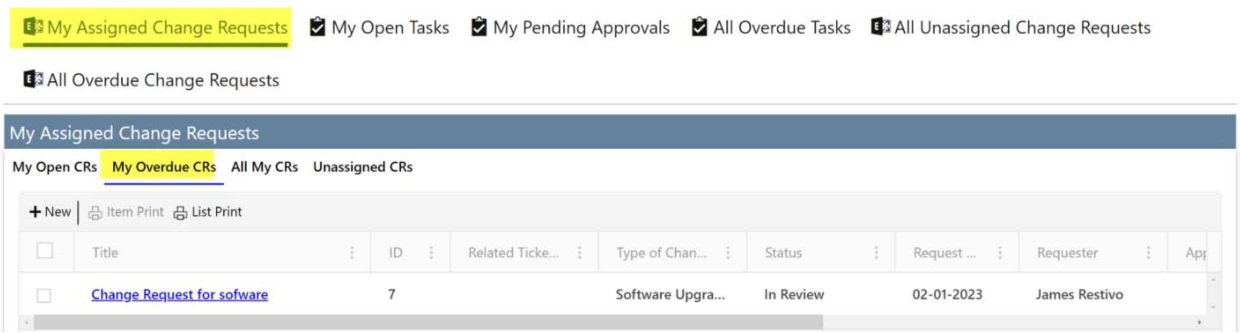
1. **Create Change Request**: A change request is initiated and submitted. This should include the details regarding the change that is required, the reason for the request and other relevant details that can help understand the approver the impact of change.
2. **Approval:** The change request is reviewed by the approver and approved/denied as per assessment done. There can be multiple level of approvals required based on impact of the change. Once approved, the change request is assigned to the appropriate team to implement it.
3. **Implementation:** Approved change requests are assigned to the team. Team makes appropriate changes and implements it.
4. **Close:** Once implemented successfully or if denied then Change Request is closed.

Other Actions that a manager can perform on a Ticket are:

- **New**: Manager can create new Ticket by clicking ‘New’ button available in upper left corner of ‘My Tickets’ views.
- **Item Print**: Manager can print an item by selecting the item and clicking on ‘Item Print’ button.
- **List Print:** Manager can print the list by clicking ‘List Print’ button available in the ribbon.
- **Send Mail**: Manager can also send mail by clicking ‘Send Mail’ button available in the item ribbon.
- **Delete**: Manager can delete a Ticket by selecting it and clicking ‘Delete’ button.

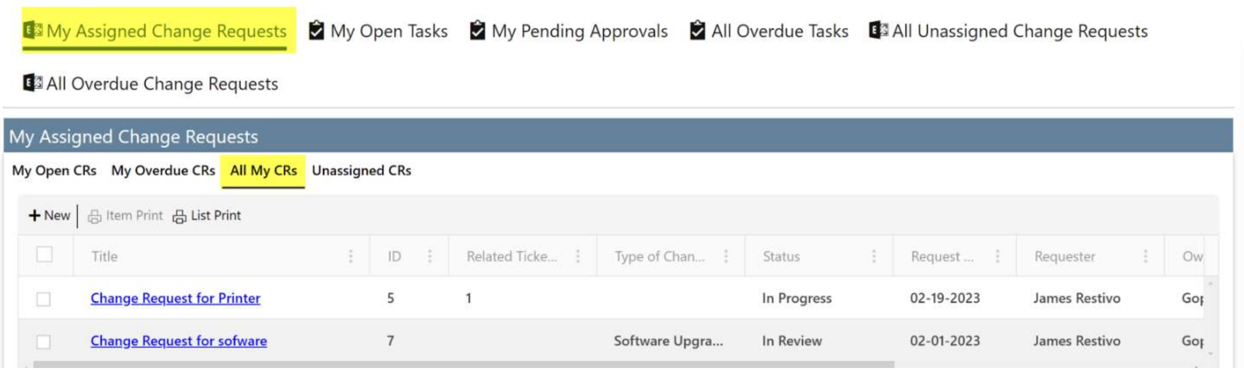
2. My Overdue CRs

Manager can view all overdue CRs by clicking ‘My Overdue CRs’ as shown below:



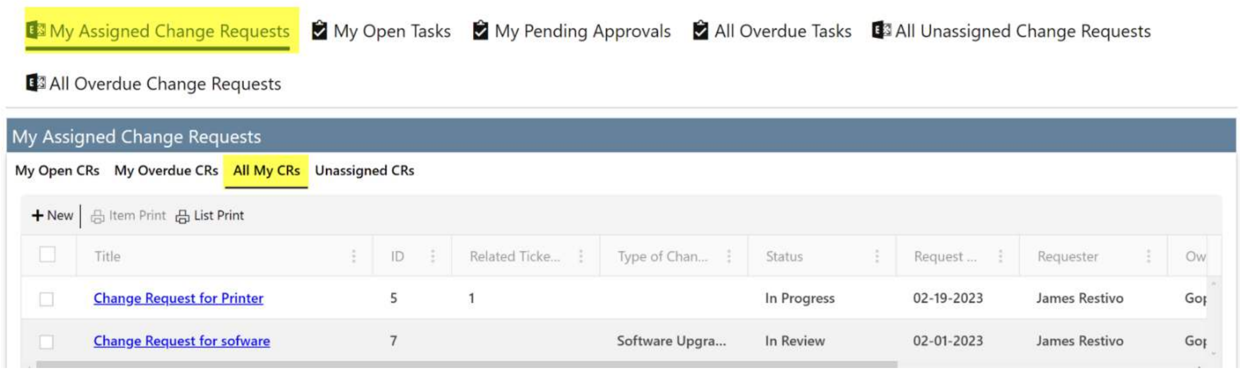
3. All My CRs

Manager can view all assigned CRs by clicking ‘All My CRs’ as shown below:



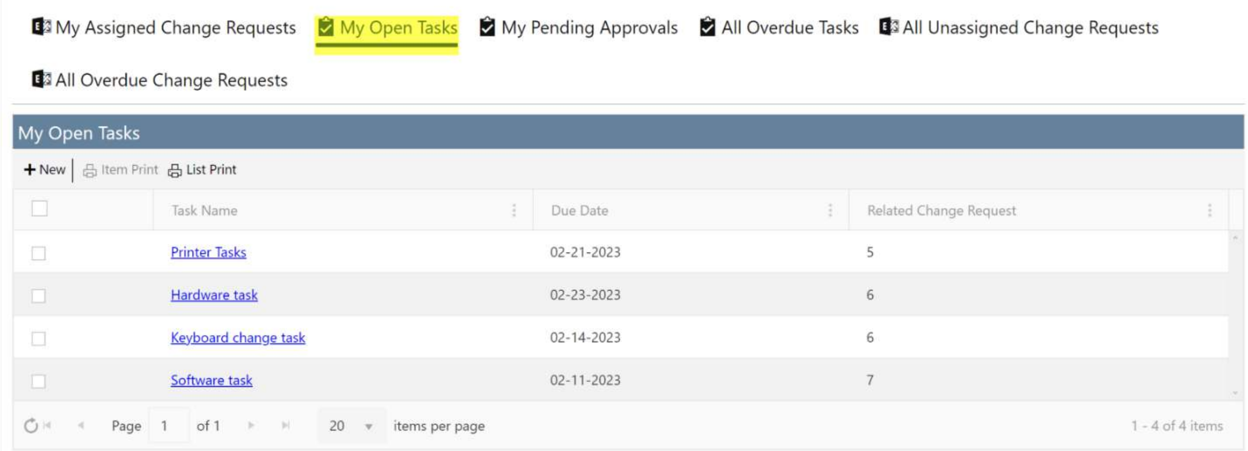
4. Unassigned CRs

Manager can view all unassigned CRs by clicking ‘Unassigned CRs’ as shown below:



My Open Tasks

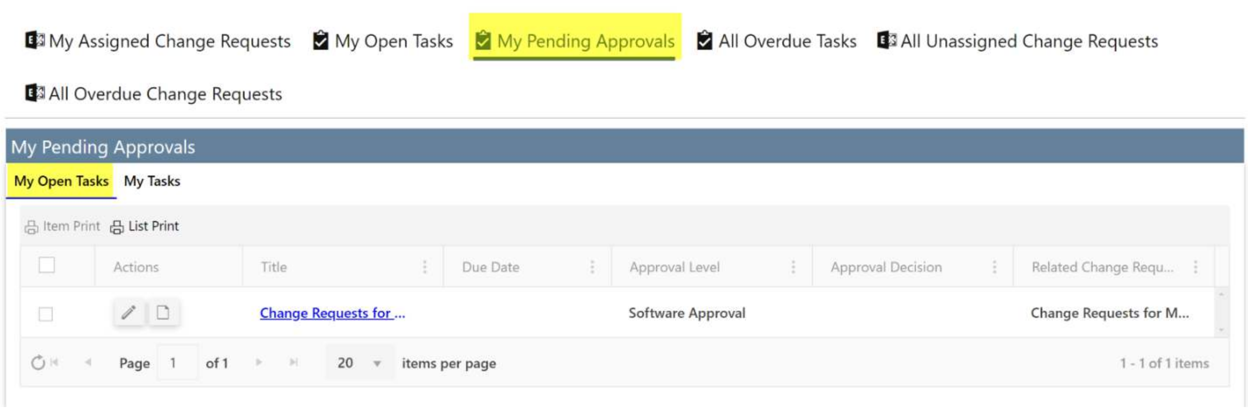
To see all open tasks, click 'My Open Tasks' view as shown below:



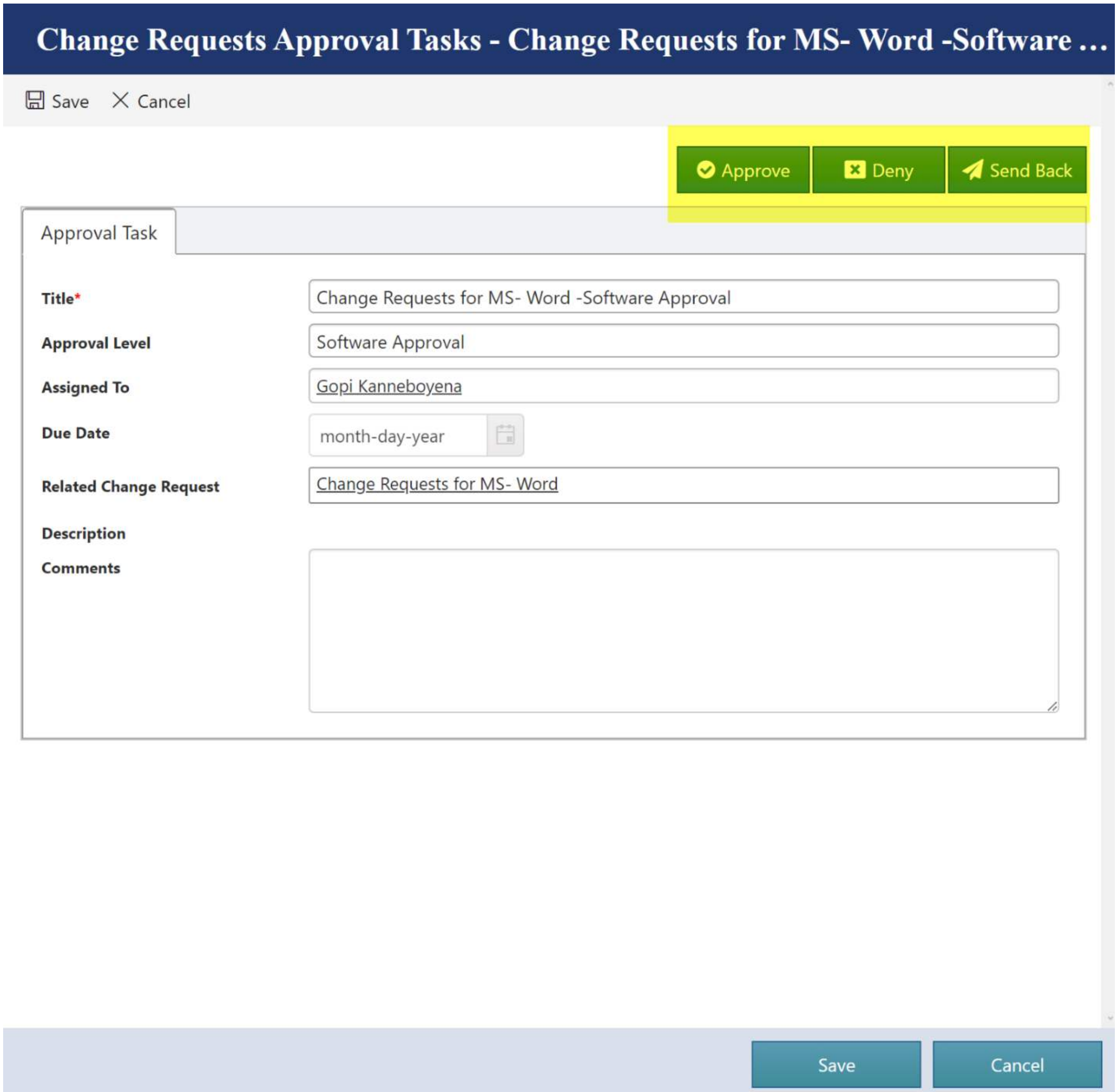
My Pending Approvals

1. My Open Tasks

To see all tasks which are pending for approval, click 'My Open Tasks' in 'My Pending Approvals'.

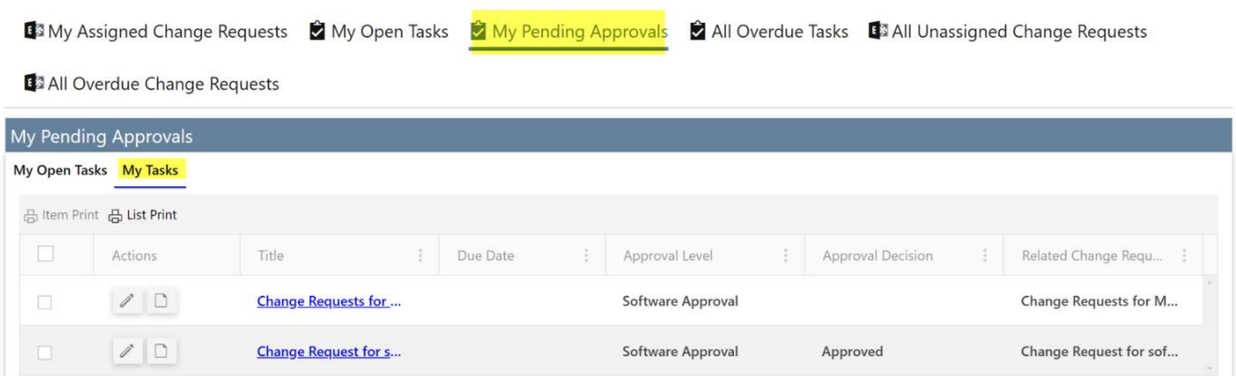


Manager can Approve, deny, or sent back the Ticket by clicking button available in edit form of Ticket as shown below:



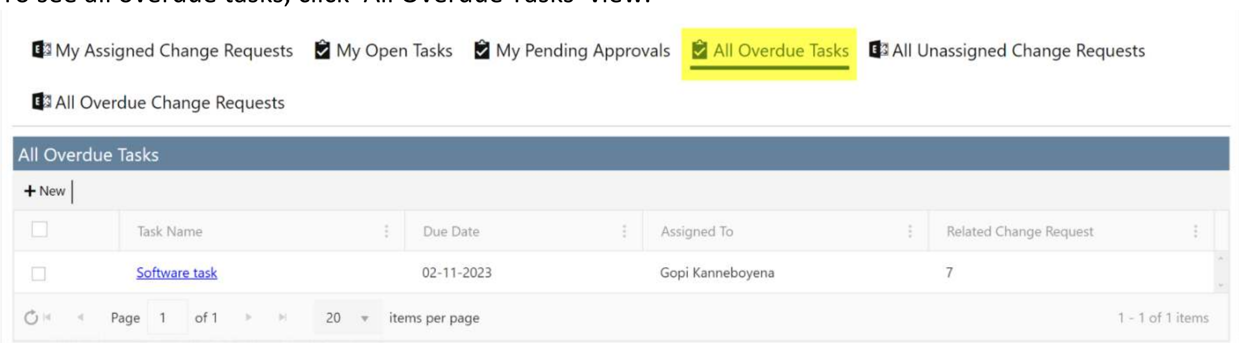
2. My Tasks

To see all tasks with approval status, click ‘My Tasks’ in ‘My Pending Approvals’.



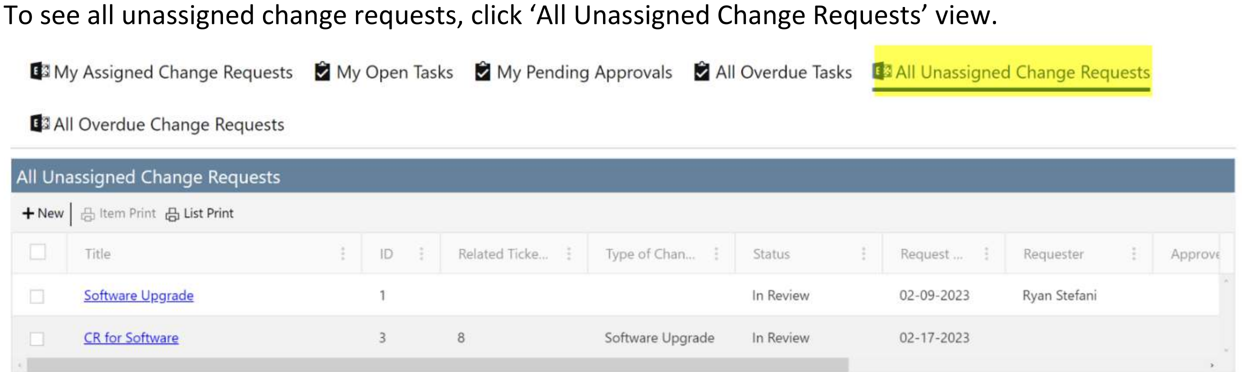
All Overdue Tasks

To see all overdue tasks, click ‘All Overdue Tasks’ view.



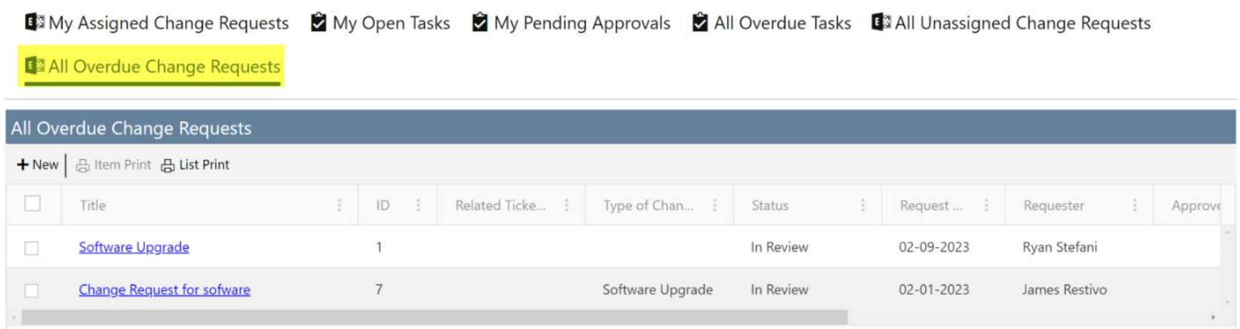
All Unassigned Change Requests

To see all unassigned change requests, click ‘All Unassigned Change Requests’ view.



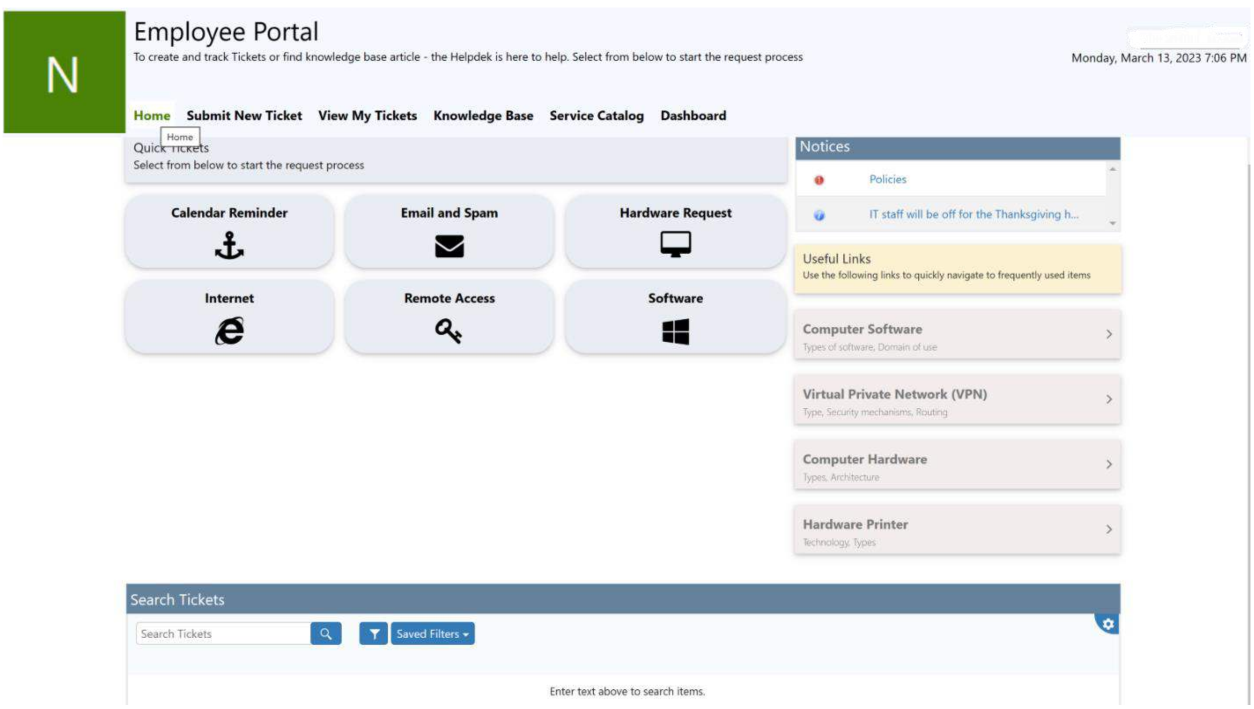
All Overdue Change Requests

To see all overdue change requests, click ‘All Overdue Change Requests’ view.



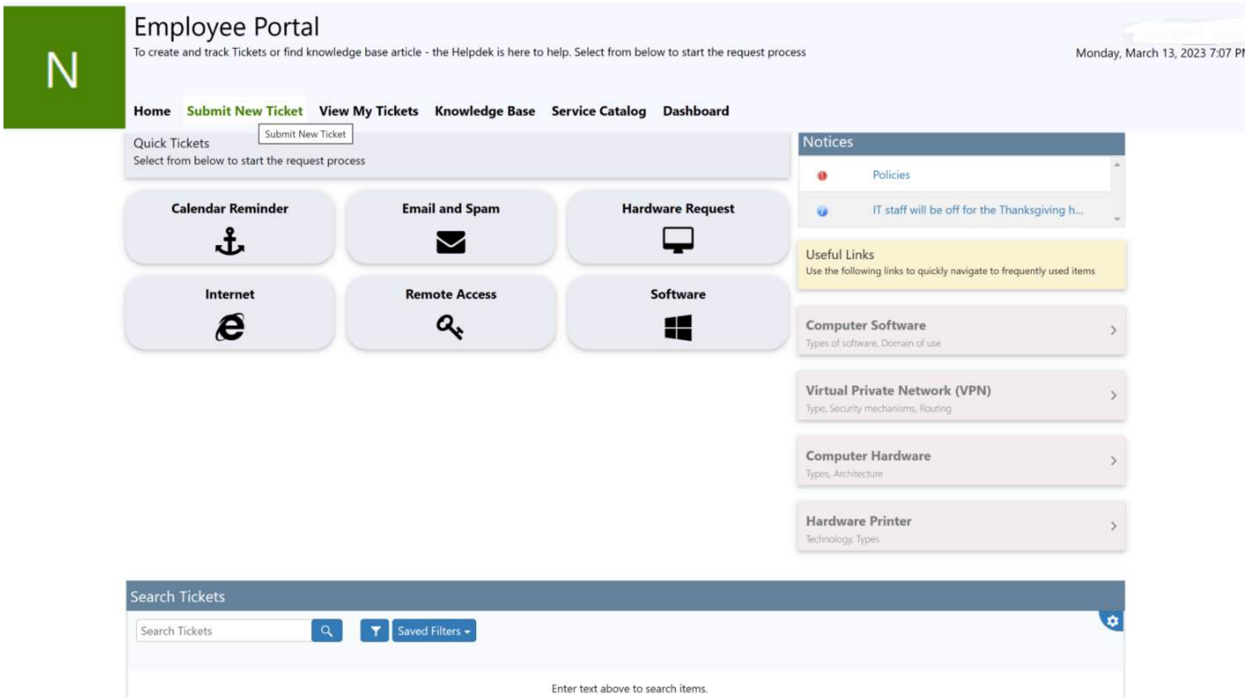
Employee Portal

The Employee Portal is your best way to create Tickets, Requests, or Work Orders, view Tickets, Requests, or Work Orders and Search Knowledge Base articles. The Employee Portal home page is as shown below:



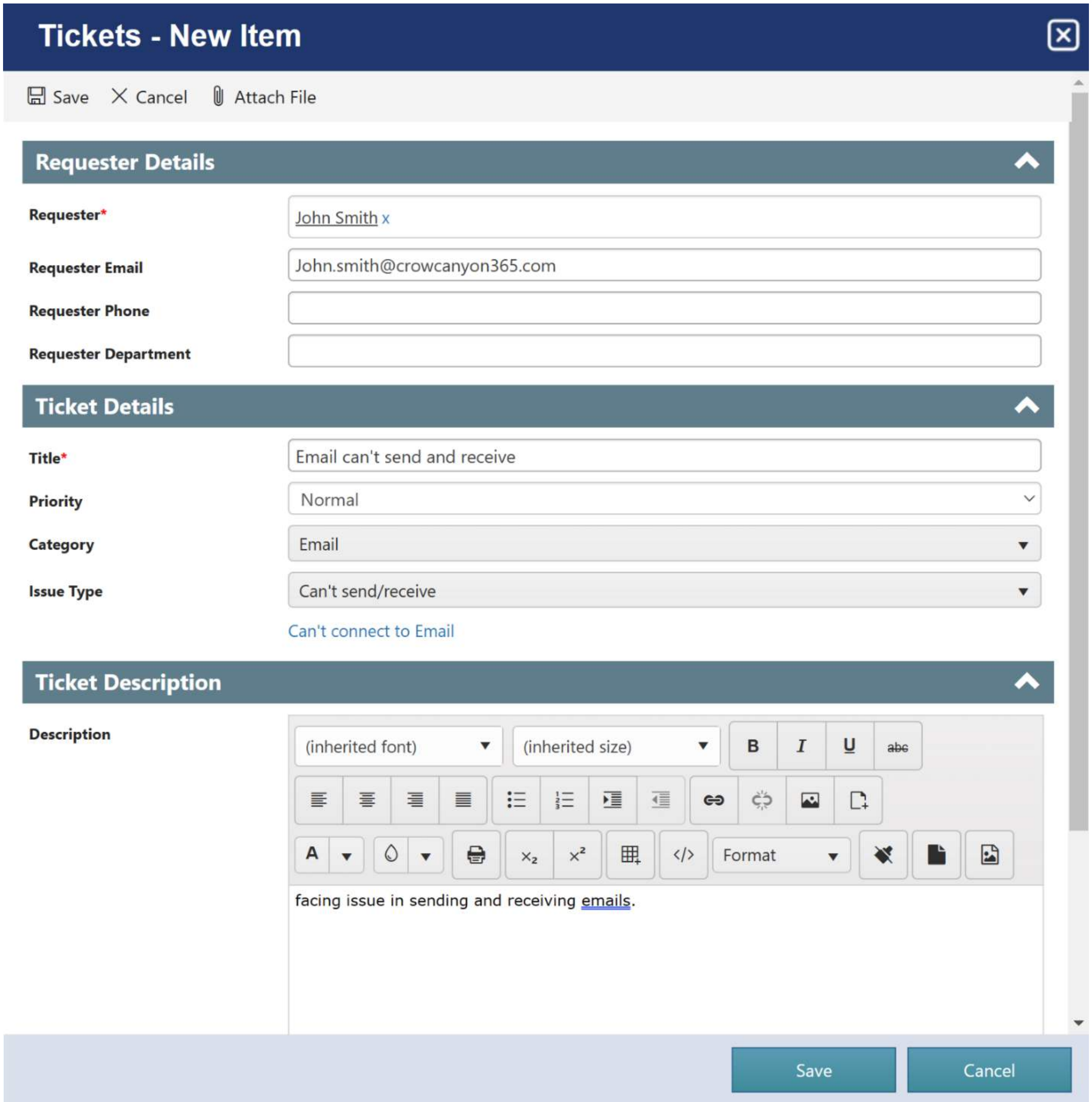
Submit Ticket, Request, or Work Order

From the Employee Portal you can create Tickets, Requests, or Work Orders using the 'Submit New Ticket' button on the home page.



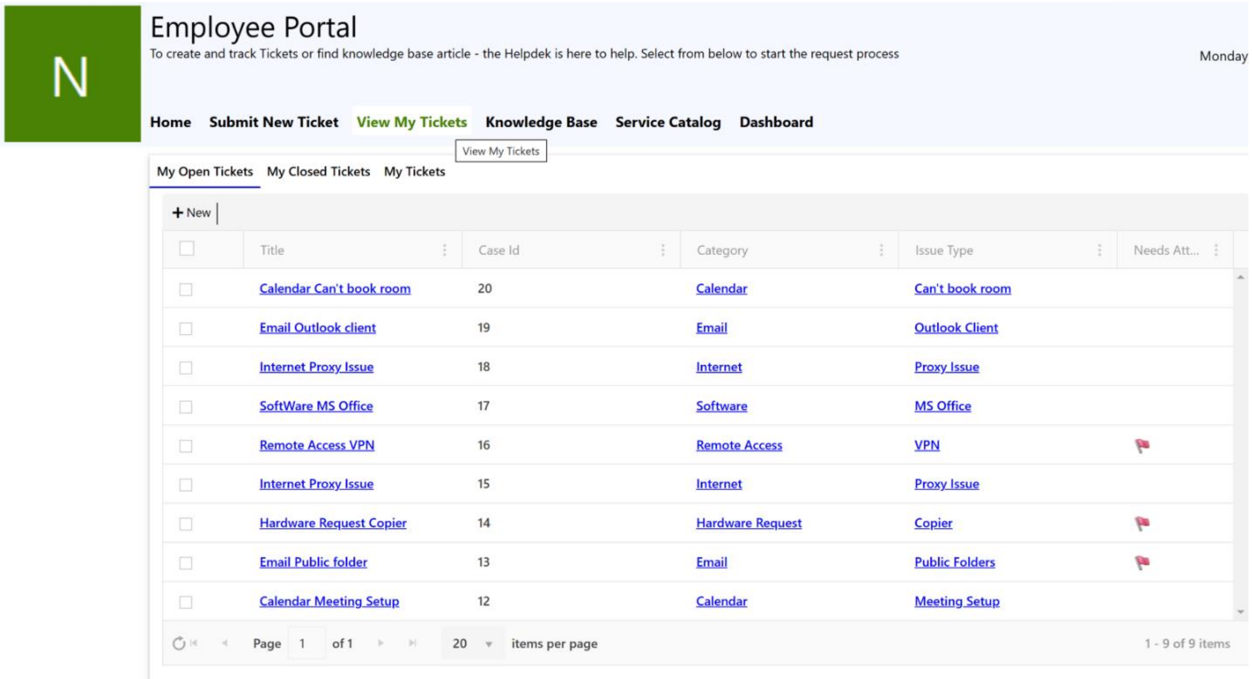
Tickets -New Item Form

After clicking ‘Submit New Ticket’, ‘Tickets-New Item’ form will open.
In this form we can give details about new Ticket.
Title: Title is used to identify the purpose of the new Ticket. It helps provide the context of the issue and makes it easier for the user to understand.
Category: A category can be chosen from the drop down which will appropriately classify the issue in an appropriate group. Based on the issue/problem user can choose a category. If no relevant category is found, then we can choose ‘Other’ as the category.
Issue Type: For the category chosen there will be a list of relevant issue types. From the issue type drop down choose an appropriate issue type that appropriately describes the issue.
Description: The issue should be described in detail in the description section. Any relevant information, errors, screenshots, attachments etc. can be provided here. This description helps the team to properly understand the issue and provide a resolution.



View My Tickets, Request, or Work Order

View My Tickets will display all the Tickets in the list as shown below.
By default, when invoked, this shows all the open Tickets that the logged in user has submitted.

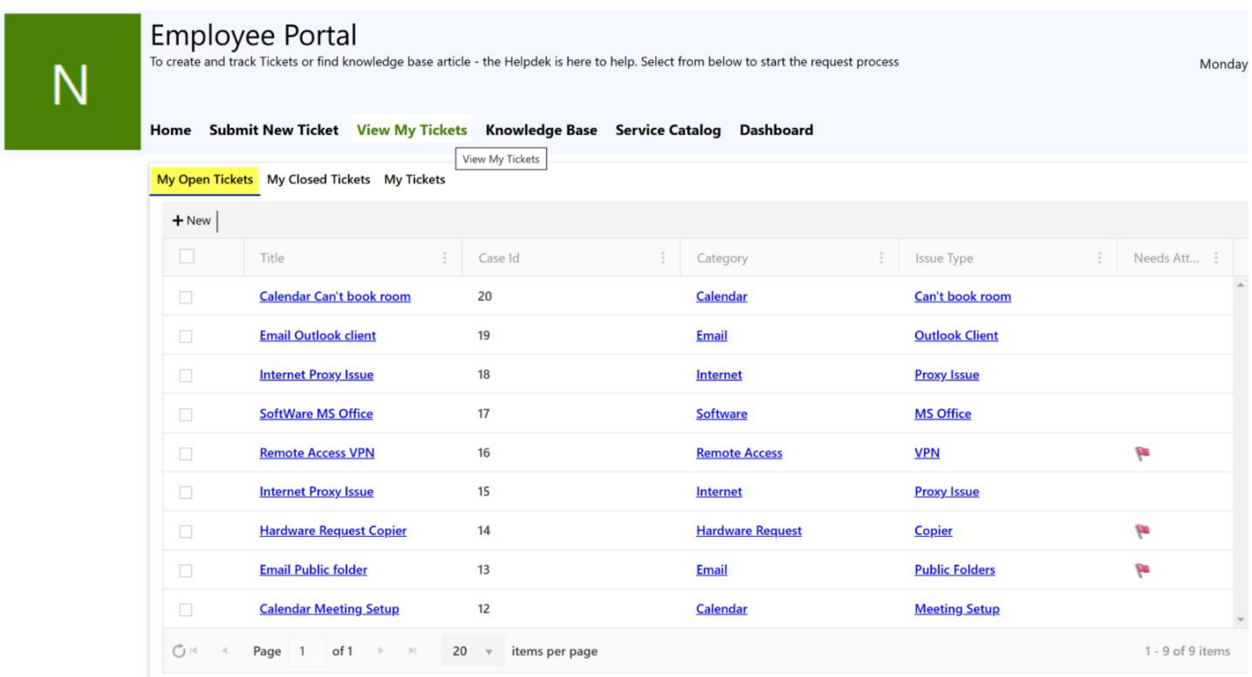


There are 3 views.

1. My Open Tickets
2. My Closed Tickets
3. My Tickets

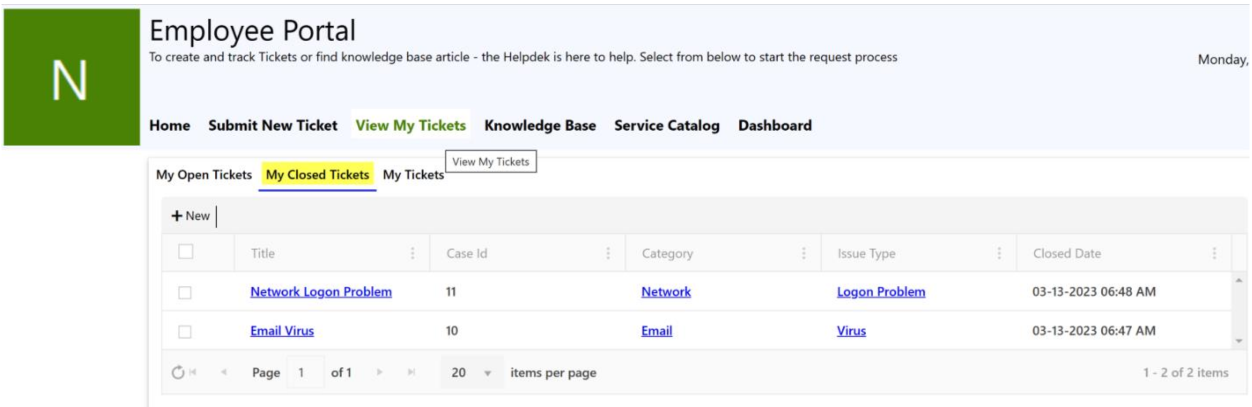
1. My Open Tickets

This view when clicked will show Tickets of logged-in user that are not yet closed and are still active.



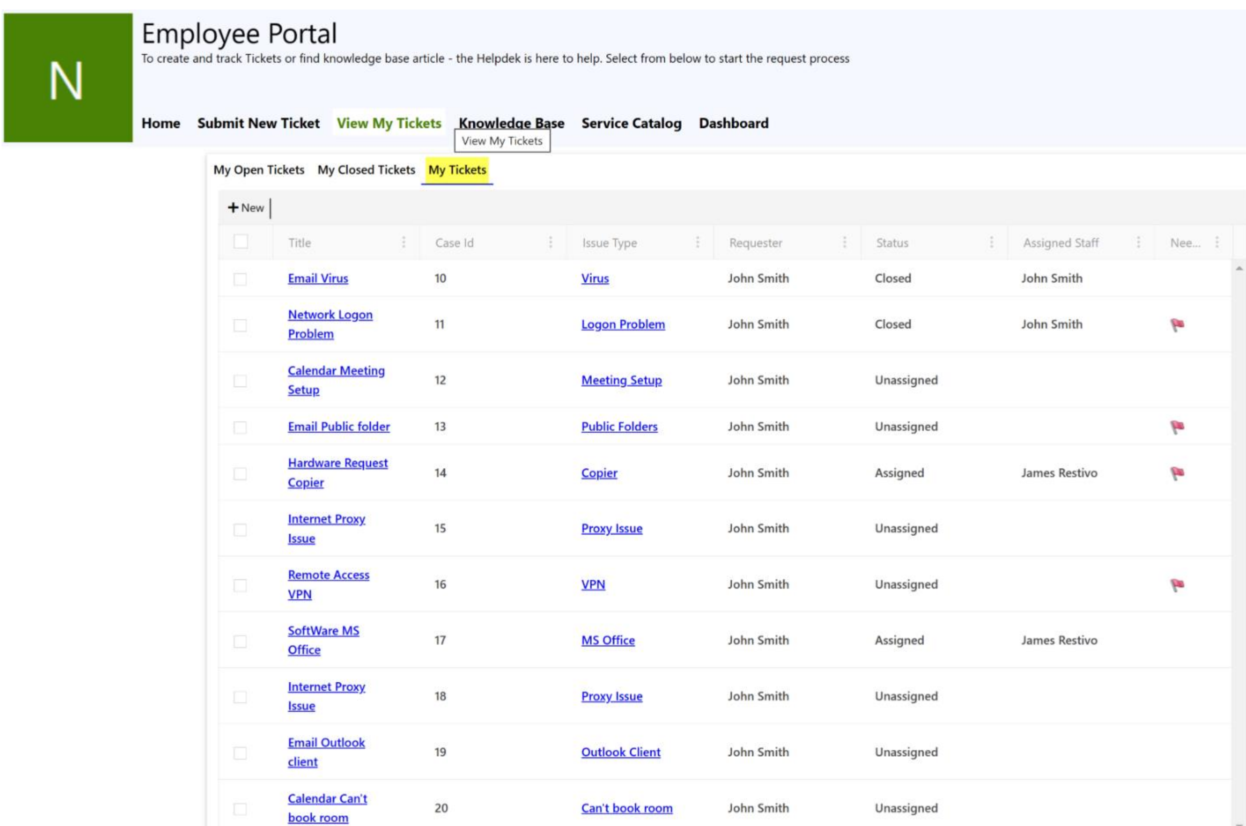
2. My Closed Tickets

This view when clicked will show Tickets of logged-in user that are closed and are not active.



3. My Tickets

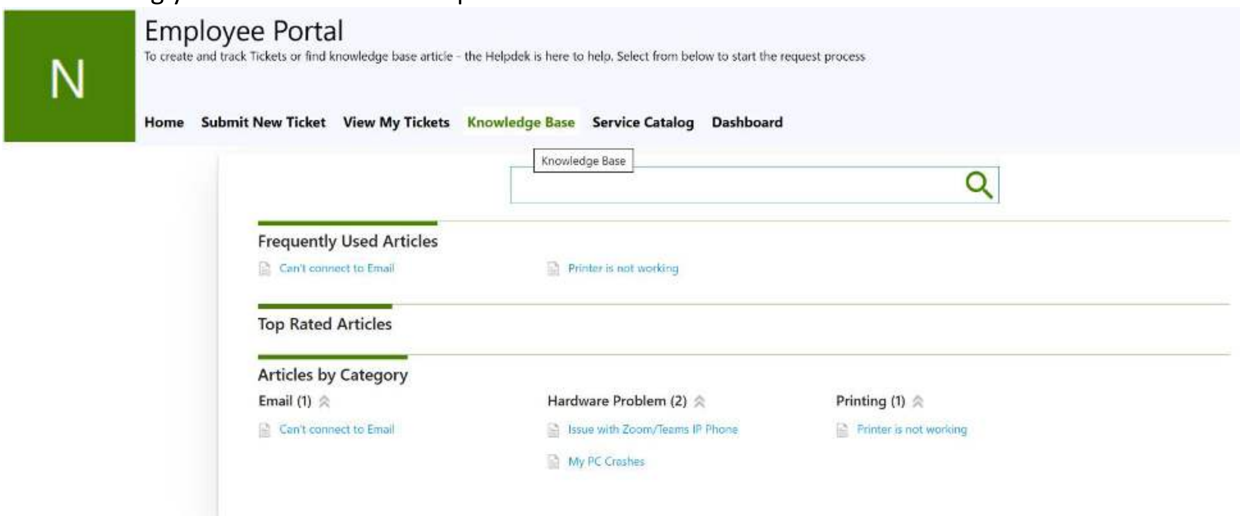
This view when clicked will show all the Tickets of logged-in user irrespective of the 'Request Status'.



Note: Your administrators may change the views here. If they are different than what is present in this documentation, please contact your administrator for a description of the views.

Knowledge Base

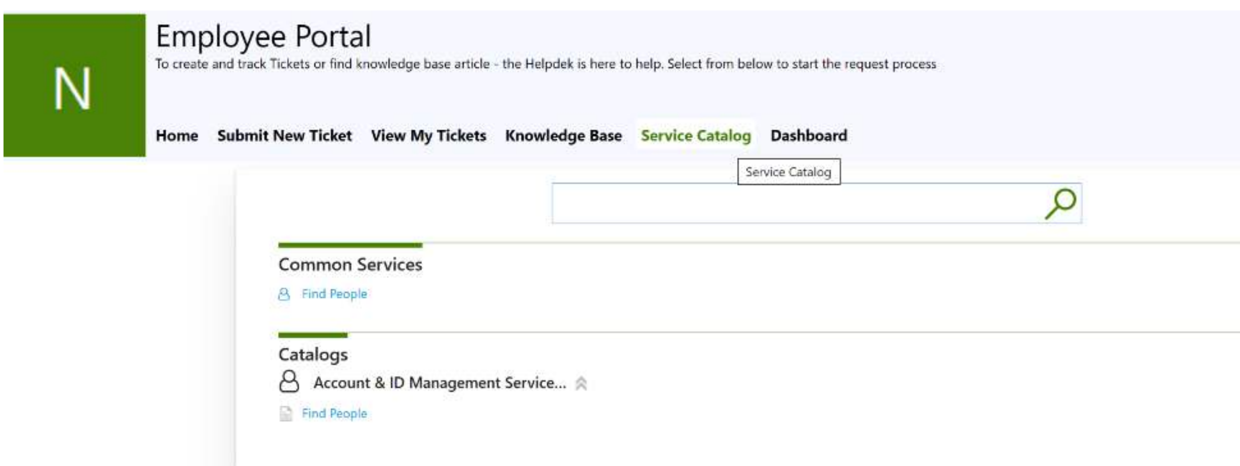
You can search a repository of articles specific to your organization by clicking the Knowledge Base link, and then entering your search term in the provided search box.



Frequently Used Articles: This section is for the ease of the user. Here one can see the frequently accessed articles. Users can click on the articles and read more about the topic.
Articles by Category: This section will show articles grouped by the category. As shown in the screenshot, there are 2 categories – Internet and Printing. Users can click on the category to see all the knowledge base articles related to that category. To further read an article in detail, the user can click on it.

Service Catalog

Service catalog provides links to common services within the organization.

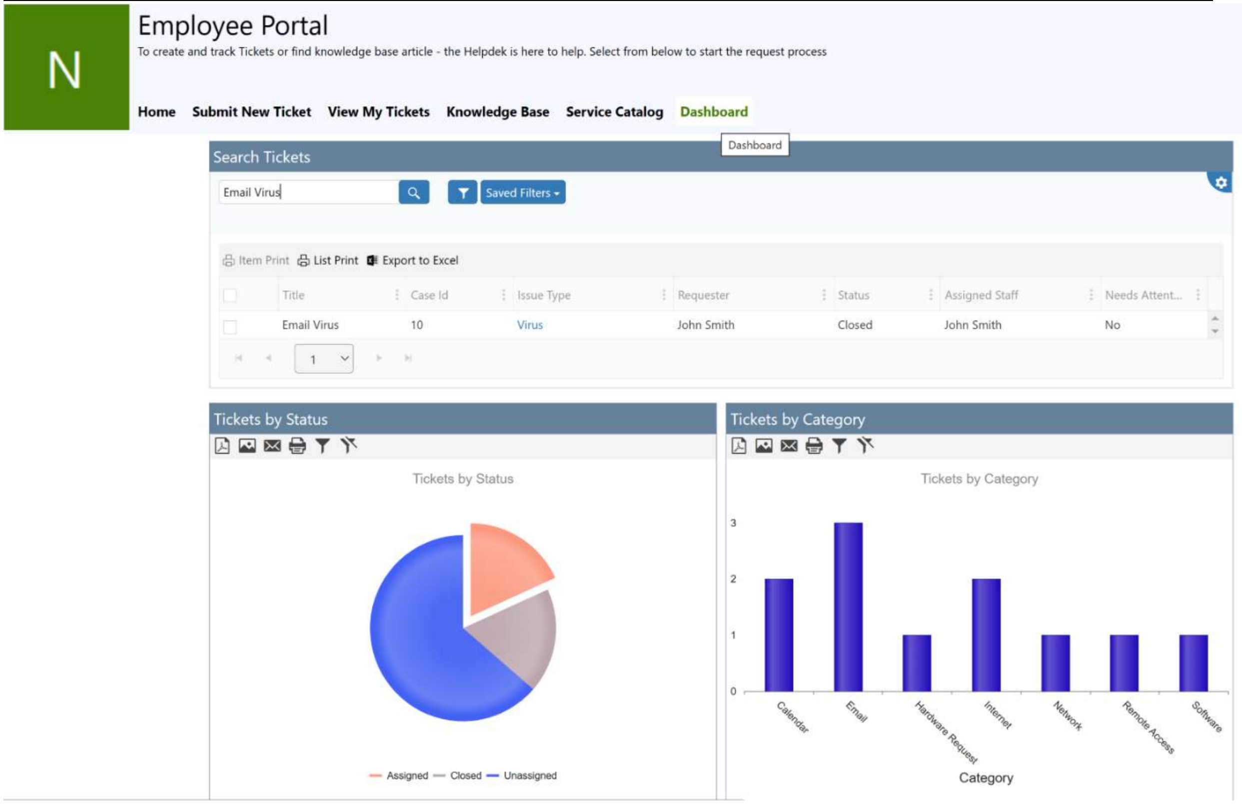


Dashboard

On the Dashboard users can search for Tickets and see their Ticket metrics in the graphical form. These reports help the user to identify the category in which a higher number of issues are being reported.

<u>Search Tickets:</u> User can search for the Tickets by putting the search text in the search box. It will list down all the related Tickets as per the search text.

<u>Ticket by Status: This section will graphically depict the Tickets categorized by status in a pie-chart.</u>
<u>Ticket by Category: This section will graphically depict the Tickets grouped by category as a bar graph.</u>

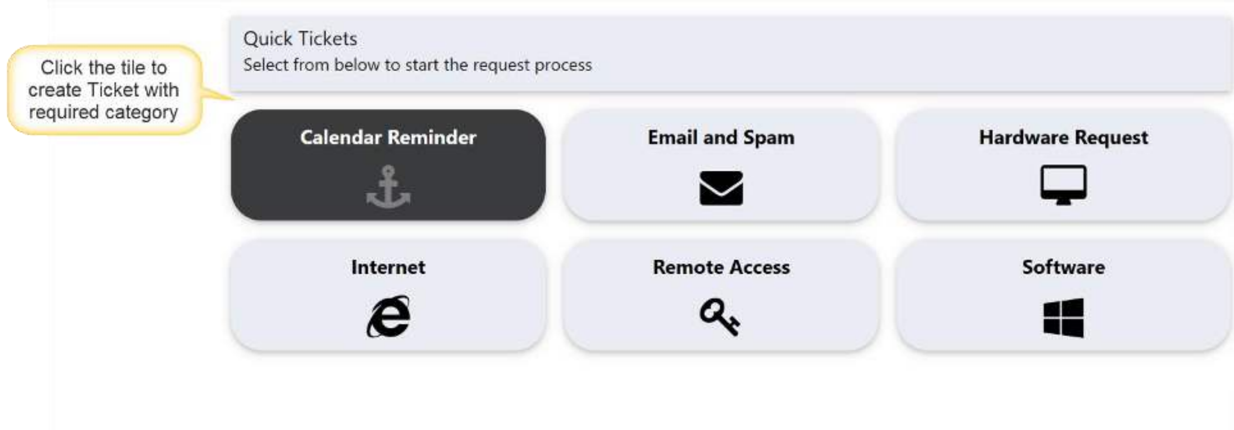


On The Home tab we have 3 sections

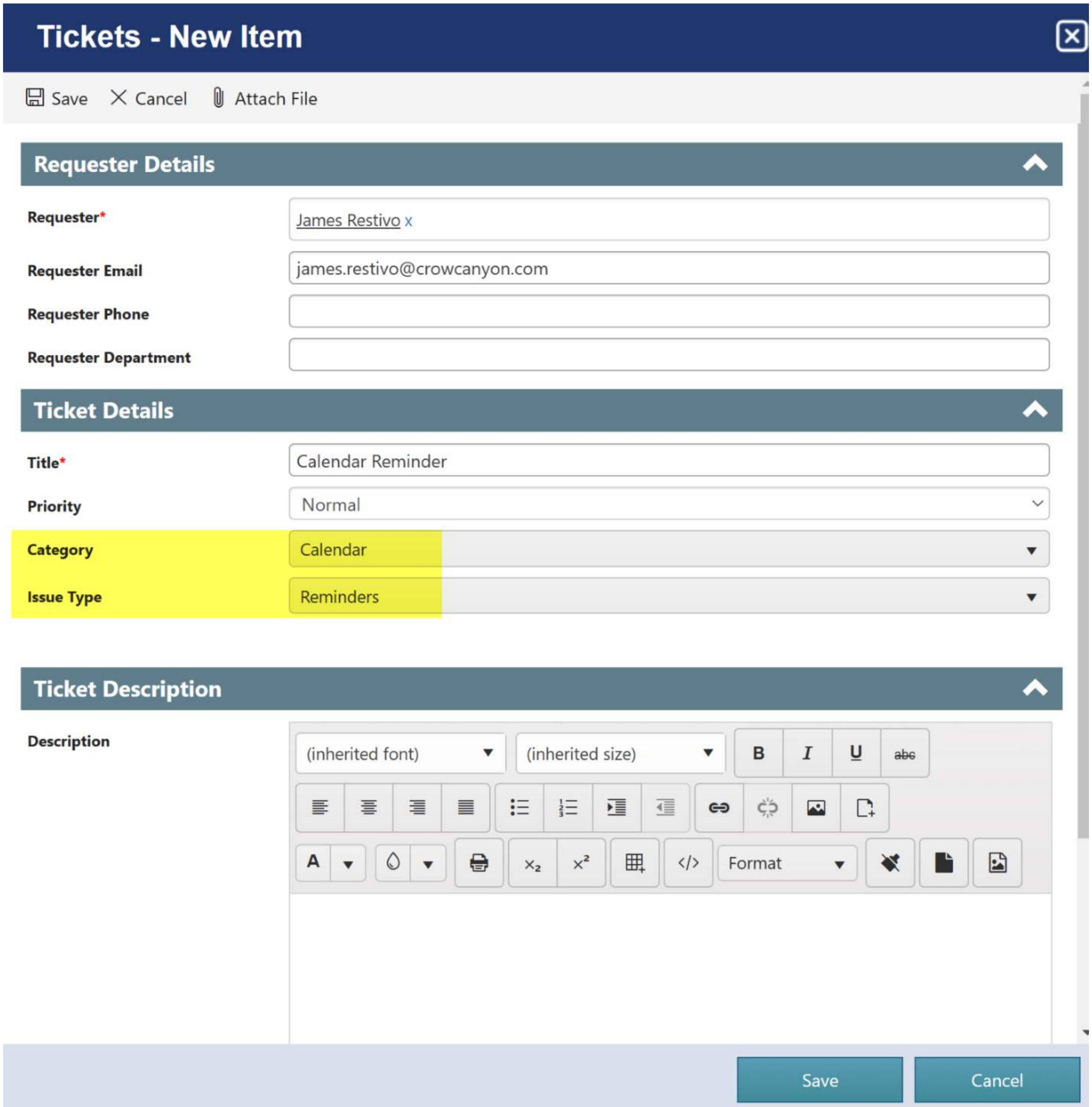
1. Quick Tickets
2. Notices
3. Useful Links

Quick Tickets

Quick Tickets provides a quick way to create Tickets with the specified Category and/or Issue Type. These may also be links out to other forms, resources, or web pages.

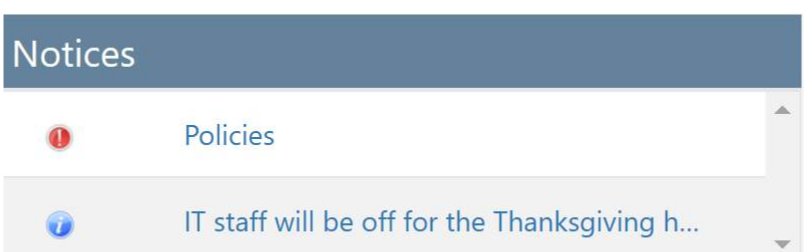


For example, click on 'Calendar Reminder' tile in Quick Tickets and you can see that the Category and Issue Type gets populated automatically in the submit form.



Notices

Notices can be advisories and important information that needs to be shown to end users.



Useful Links

Useful Links are typically links connecting you to commonly used resources for your organization.