



# NITRO Help Desk Manual

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## 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:

#### Site Permissions

- Manage Permissions - Create and change permission levels on the Web site and assign permissions to users and groups.
- View Web Analytics Data - View reports on Web site usage.
- Create Subsites - Create subsites such as team sites, Meeting Workspace sites, and Document Workspace sites.
- Manage Web Site - Grants the ability to perform all administration tasks for the Web site as well as manage content.

For more details regarding permissions levels, please refer this [article](#).  
Click ‘Application Administration’ in the settings as shown below:

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## Settings

SharePoint

- [Add a page](#)
- [Add an app](#)
- [Site contents](#)
- [Application Administration](#)
- [Site information](#)
- [Site permissions](#)
- [Apply a site template](#)
- [Site usage](#)
- [Change the look](#)

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Microsoft 365

[View all](#)

### Application Administration page

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Home Knowledge Base Report Center Employee Portal

NITRO Help desk

📄

- Categorization
- 📄 Auto Assignment
- 🔔 Notifications
- 🕒 Service Level Agreements
- 🔒 Permissions
- ▲ Change Request Approv...
- 🔧 Advanced
- 📄 Configure Lists
- 🔄 Recurring Tickets
- 📖 Service Catalog
- ⚙️ General Configuration
- 🚀 Crow Canyon NITRO Apps

#### Setup Categories and IssueTypes

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.

Category list info:  
 Category owner = The person who will be 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.

Issue Type list info:  
 Assigned Staff = One or more people that will be assigned to the ticket when it is created with this Issue Type. Note: does not accept SharePoint Groups, O365 Groups, or Teams.

Category							
	Title	ID	Priority	Category Owner	Assigned Team	Associated From Email Address or Email TL...	
<input type="checkbox"/>	<a href="#">Calendar</a>	1	Any				
<input type="checkbox"/>	<a href="#">Email</a>	2	Any				
<input type="checkbox"/>	<a href="#">Hardware Request</a>	3	Any				
<input type="checkbox"/>	<a href="#">Hardware Problem</a>	4	Any				
<input type="checkbox"/>	<a href="#">Internet</a>	5	Any				

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Issue Type								
	Title	ID	Category	Template	Assigned Staff	Enable Round ...	Next Staff	
<input type="checkbox"/>	<a href="#">Calendar Delegation</a>	1	Calendar			No		
<input type="checkbox"/>	<a href="#">Can't book room</a>	2	Calendar			No		
<input type="checkbox"/>	<a href="#">Can't book resource</a>	3	Calendar			No		
<input type="checkbox"/>	<a href="#">Time Zones</a>	4	Calendar			No		
<input type="checkbox"/>	<a href="#">Meeting Setup</a>	5	Calendar			No		

🔄 Page 1 of 21 5 Items per page 1 - 5 of 101 Items

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.

#### Category list:

- 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.*

#### Issue Type list:

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



## Categorization

Auto Assignment

Notifications

Service Level Agreements

Permissions

Change Request Approv...

Advanced

## Setup Categories and IssueTypes

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Issue Type list info:

Assigned Staff = One or more people that will be assigned to the ticket when it is created with this Issue Type. Note: does not accept SharePoint Groups, O365 Groups, or Teams.

## Category

+ New

<input type="checkbox"/>	Title	ID	Priority	Category Owner	Assigned Team	Associated From Em...
<input type="checkbox"/>	<a href="#">Calendar</a>	1	Any			
<input type="checkbox"/>	<a href="#">Email</a>	2	Any			
<input type="checkbox"/>	<a href="#">Hardware Request</a>	3	Any			
<input type="checkbox"/>	<a href="#">Hardware Problem</a>	4	Any			
<input type="checkbox"/>	<a href="#">Internet</a>	5	Any			
<input type="checkbox"/>	<a href="#">Network</a>	6	Any			
<input type="checkbox"/>	<a href="#">Printing</a>	7	Any			
<input type="checkbox"/>	<a href="#">Remote Access</a>	8	Any			
<input type="checkbox"/>	<a href="#">Software</a>	9	Any			

## Issue Type

+ New

<input type="checkbox"/>	Title	ID	Category	Template	Assigned Staff	Enab...	Next Staff
<input type="checkbox"/>	<a href="#">Calendar Delegation</a>	1	Calendar			No	
<input type="checkbox"/>	<a href="#">Can't book room</a>	2	Calendar			No	
<input type="checkbox"/>	<a href="#">Can't book resource</a>	3	Calendar			No	
<input type="checkbox"/>	<a href="#">Time Zones</a>	4	Calendar			No	
<input type="checkbox"/>	<a href="#">Meeting Setup</a>	5	Calendar			No	
<input type="checkbox"/>	<a href="#">Reminders</a>	6	Calendar			No	
<input type="checkbox"/>	<a href="#">Other</a>	7	Calendar			No	
<input type="checkbox"/>	<a href="#">Address Book</a>	8	Email			No	

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

## Category - New Item

Save Cancel

Category

**Title\***

**Category Owner**   
Notify specified users when a Ticket is created with this Category and Priority

**Priority**

**Assigned Team**

**Associated From Email Address or Email Tickets List Name**

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

## Issue Type - New Item

Save × Cancel

Issue Type

**Title\***

**Category** (None) ▼

**Template**

**Assigned Staff**

**Enable Round Robin Assignment**

**Next Staff**

**Receivers**

Specify one or more email addresses e.g. [a@y.com][b@z.com] that are configured in "Email Sync" settings or Emails list names  
Tickets sent to these email addresses or emails lists will automatically be categorized with this issue type

Save Cancel

### Auto Assignment

Administrator can configure Ticket auto-assignment.

For Auto Assignment

Go to Application Administration → Auto Assignment tab

**NITRO Help desk**

Home Knowledge Base Report Center Employee Portal

**Categorization**

- Auto Assignment
- Notifications
- Service Level Agreements
- Permissions
- Change Request Approv...
- Advanced

Configure Ticket auto-assignment. Each new Ticket can be assigned automatically to available staff in turn (round-robin). If particular staff need to work on some types of Tickets, configure auto-assignment in Issue Type list. Please refer to this [article](#) for more details.

**Configurations**

<input type="checkbox"/>	Title	Fill...	Read Informa...	Product	Tickets List N...	KB Mappings	Email Tickets ...	UserProfileAc...
<input type="checkbox"/>	<a href="#">Configuration...</a>	Yes	SharePoint User ...	Service Request	Tickets	Title=Title Category1=Cate...	Email Tickets	1

Page 1 of 1

**Issue Type**

+ New

<input type="checkbox"/>	Title	ID	Category	Template	Assigned Staff	Enab...	Next Staff
<input type="checkbox"/>	<a href="#">Calendar Delegation</a>	1	Calendar			No	
<input type="checkbox"/>	<a href="#">Can't book room</a>	2	Calendar			No	
<input type="checkbox"/>	<a href="#">Can't book resource</a>	3	Calendar			No	
<input type="checkbox"/>	<a href="#">Time Zones</a>	4	Calendar			No	
<input type="checkbox"/>	<a href="#">Meeting Setup</a>	5	Calendar			No	
<input type="checkbox"/>	<a href="#">Reminders</a>	6	Calendar			No	

Page 1 of 1 20 items per page 1 - 2 of 2 items

**Round Robin Staff**

+ New

<input type="checkbox"/>	Title	Staff	Tickets Count
<input type="checkbox"/>	Pavan Kumar	Pavan Kumar	2
<input type="checkbox"/>	James Restivo	James Restivo	0

Page 1 of 1 20 items per page 1 - 2 of 2 items

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'.

## Issue Type - Calendar Delegation

Save Cancel

1 of 101 ↑ ↓

Issue Type

**Title\***

**Category**

**Template**

**Assigned Staff**

**Enable Round Robin Assignment**

**Next Staff**

**Receivers**

Specify one or more email addresses e.g. [a@y.com][b@z.com] that are configured in "Email Sync" settings or Emails list names  
Tickets sent to these email addresses or emails lists will automatically be categorized with this issue type

Created at 07-18-2022 12:31 AM by  SharePoint App

Last modified at 08-28-2022 10:43 PM by  Pavan Kumar

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.

Round Robin Staff

+ New | Click 'New' button to define staff in 'Round Robin Staff' list

<input type="checkbox"/>	Title	Staff	Tickets Count
<input type="checkbox"/>	Pavan Kumar	Pavan Kumar	2
<input type="checkbox"/>	James Restivo	James Restivo	0

Page 1 of 1 | 20 items per page | 1 - 2 of 2 items

**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.

### Round Robin Staff - James Restivo

Save Cancel 2 of 2

Default

**Title\*** James Restivo

**Staff** James Restivo x

**Tickets Count** 0.00

Created at 08-28-2022 11:23 PM by Pavan Kumar  
Last modified at 08-28-2022 11:23 PM by Pavan Kumar

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

Configurations

List Settings

Edit this item

<input type="checkbox"/>	Title	Fill R...	Read Information F...	Product	Tickets List Name	KB Mappings
<input type="checkbox"/>	<a href="#">Configurations - Service Request</a>	Yes	SharePoint User Profile	Service Request	Tickets	Title=Title Category1=Category1

Page 1 of 1 | 20 items per page

General	Requester Information	Knowledge Base	Email Handling	Extended Settings	Ticket Assignment	SLA
<p><b>Enable General Auto-Assignment</b> <input checked="" type="checkbox"/> </p> <p>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.</p>						
<p><b>Business Time Configurations</b></p> <div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div> <p>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</p>						
<p><b>On Call Tech Assignment Configurations</b></p> <div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div> <p>Enabled=Yes/No            BusinessHoursTechnician=user1            HolidayTechnician=user2            NonBusinessHoursTechnician=user3            TechnicianCalendarList=Calendar            TechnicianCalendarField=Technician            TechnicianCalendarFilter=Category,OnCall</p>						
<p>Created at 07-18-2022 12:31 AM by <input type="checkbox"/> SharePoint App            Last modified at 08-28-2022 10:27 PM by <input type="checkbox"/> Pavan Kumar</p>						

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.

**NITRO Help desk**

Home Knowledge Base Report Center Employee Portal

Categorization  
 Auto Assignment  
**Notifications**  
 Service Level Agreements  
 Permissions  
 Change Request Approv...  
 Advanced

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- Notification on Ticket Assignment - When Ticket is assigned to a staff
- Notification on Ticket Resolution - When Ticket is resolved. This occurs when an end user responds via email to a ticket that was marked as "Resolved"
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- 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 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 NITRO Studio Workflows.

<b>Notification on Ticket Creation</b> 	<b>Notification on Ticket Assignment</b> 	<b>Notification on Ticket Resolution</b> 
<b>Notification on Ticket Completion</b> 	<b>Notification On Incoming Email</b> 	<b>Notification on Ticket Reactivation</b> 

Notification on Ticket Creation:



**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 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 Incoming Email:

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

The screenshot shows a configuration window with a title bar containing 'Save' and 'Cancel' buttons. The window has a 'General' tab selected. The configuration options are as follows:

Field	Value
Title*	Notification on Incoming Email
Notify Staff	<input checked="" type="checkbox"/>
From Address*	no-reply@sharepointonline.com
Add email attachments to Ticket	<input checked="" type="checkbox"/>
Add email attachments to auto notifications	<input type="checkbox"/>
Check Staff OOF	<input type="checkbox"/>
Notify Requester	<input type="radio"/> Always <input type="radio"/> On Assigned Staff reply <input type="radio"/> Never

At the bottom right of the window, there are two buttons: 'Save' and 'Cancel'.

### Notification on Ticket Reactivation:

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

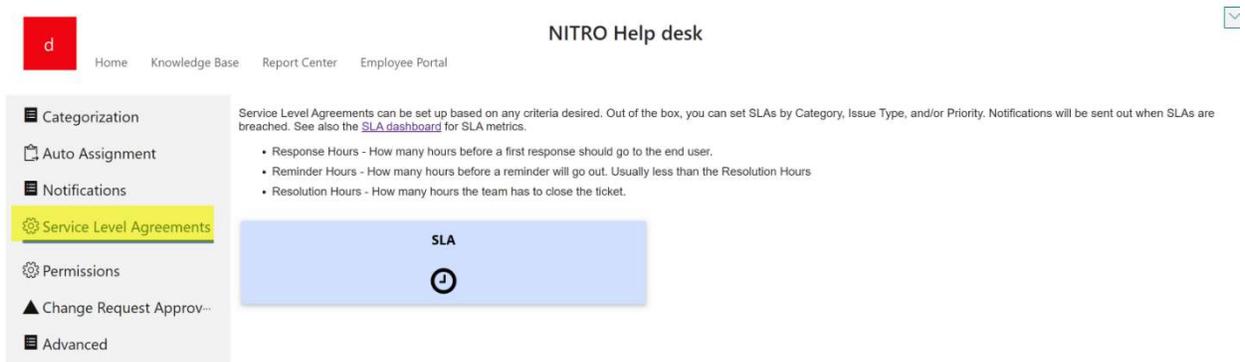


## Service Level Agreements

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.

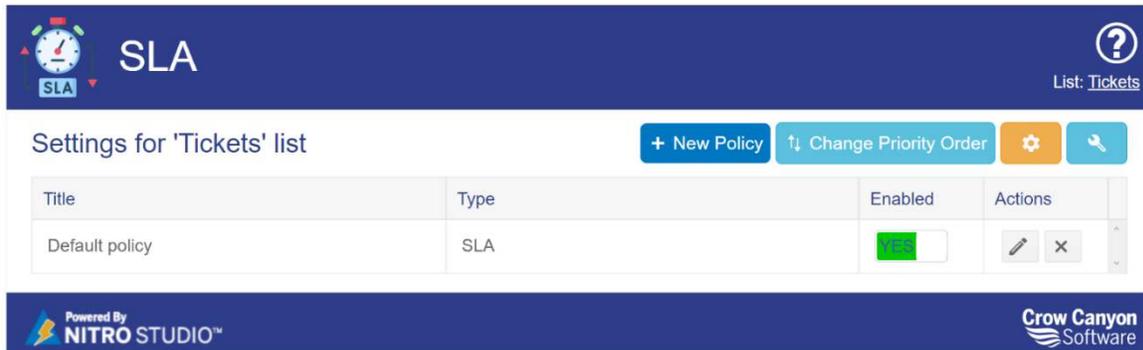
- Response Hours - How many hours before a first response should go to the end user.
- Reminder Hours - How many hours before a reminder will go out. Usually less than the Resolution Hours
- Resolution Hours - How many hours the team has to close the Ticket.

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.

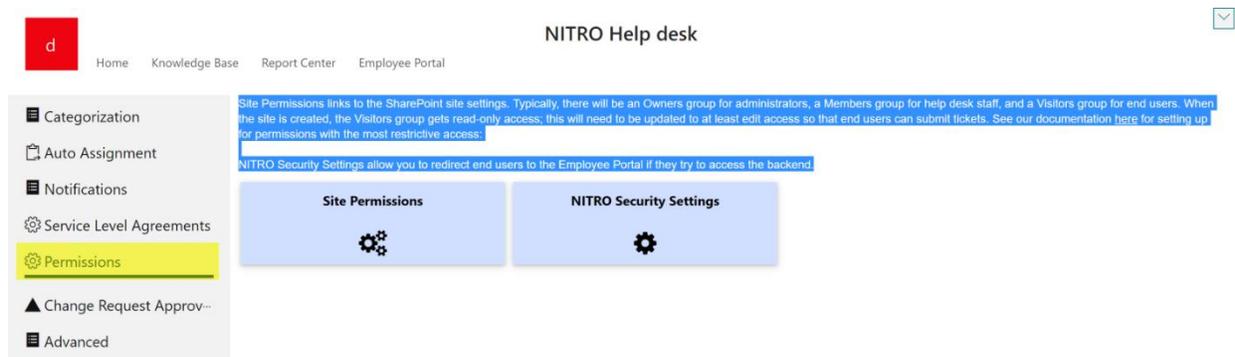
[SLA.docx \(sharepoint.com\)](#)

## 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:

**NITRO Help desk**

Home Knowledge Base Report Center Employee Portal

- Categoryization
- Auto Assignment
- Notifications
- Service Level Agreements
- Permissions
- Change Request Approv--**
- Advanced

Set the approver(s) for Change Requests based on the Change Type (called "Type of Change") on the Change Request form.

### Change Requests Approver Definition

+ New

<input type="checkbox"/>	Change Type	Approver(s)
<input type="checkbox"/>	<a href="#">Software Upgrade</a>	Ryan Stefani

Page 1 of 1 20 items per page 1 - 1 of 1 items

### Approval Levels

+ New Item Print List Print

<input type="checkbox"/>	Title	Approvers	Due Hours	Request Approvers	Approval Level Na...	Lookup Approvers
<input type="checkbox"/>	<a href="#">Software Approval</a>	Ryan Stefani			Software Approval	

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## Advanced

### Configure Lists:

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

**NITRO Help desk**

Home Knowledge Base Report Center Employee Portal

- Categoryization
- Auto Assignment
- Notifications
- Service Level Agreements
- Permissions
- Change Request Approv--
- Advanced
- Configure Lists**
- Recurring Tickets
- Service Catalog
- General Configuration
- Crow Canyon NITRO Apps

Links to the List Settings page for each of the core lists used in the help desk application.

<b>Configure Tickets</b>	<b>Configure Problems</b>	<b>Configure Change Requests</b>	<b>Configure Tasks</b>
<b>Configure Time Tracking</b>	<b>Configure Change Request Tasks</b>	<b>Configure Problem Tasks</b>	<b>Configure Recurring Ticket Templates</b>
<b>Configure Approval Levels</b>	<b>Configure Category</b>	<b>Configure Issue Type</b>	<b>Configure Configurations</b>
<b>Configure Knowledge Base</b>	<b>Configure Email Tickets</b>	<b>Configure Change Requests Approval Tasks</b>	<b>Configure Change Requests Approver Definition</b>
<b>Configure Holidays</b>	<b>Configure New Ticket Utility</b>	<b>Configure Notification On Incoming Email</b>	<b>Configure Notification On Ticket Assignment</b>
<b>Configure Notification On Ticket Completion</b>	<b>Configure Notification on Ticket Reactivation</b>	<b>Configure Notification on Ticket Resolution</b>	<b>Configure Round Robin Staff</b>
<b>Configure Catalog</b>	<b>Configure Service Catalog</b>		

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

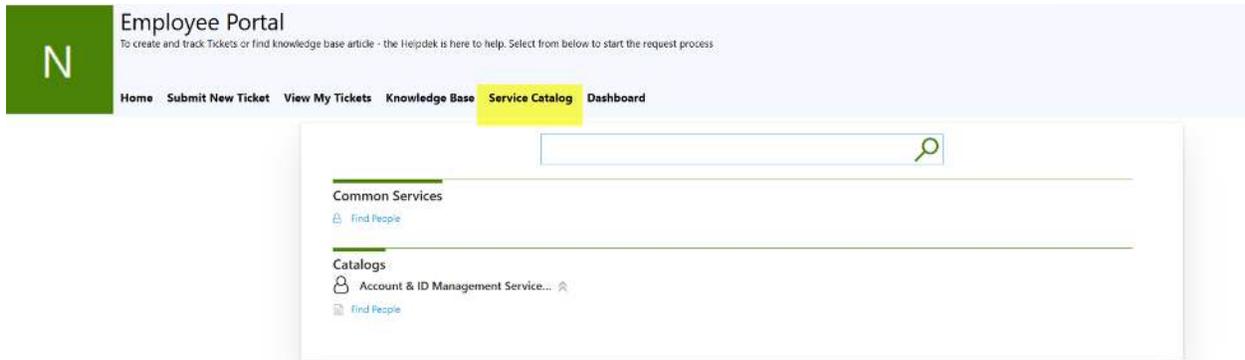
Templates list if needed. Then set up the Recurring Schedule and connect it to the template by using the Ticket Template lookup field on the Recurring Schedule list.

The screenshot shows the NITRO Help desk interface. The top navigation bar includes 'Home', 'Knowledge Base', 'Report Center', and 'Employee Portal'. A sidebar on the left contains a menu with items like 'Categorization', 'Auto Assignment', 'Notifications', 'Service Level Agreements', 'Permissions', 'Change Request Approv...', 'Advanced', 'Configure Lists', 'Recurring Tickets', 'Service Catalog', 'General Configuration', and 'Crow Canyon NITRO Apps'. The 'Recurring Tickets' menu item is highlighted in yellow. The main content area is titled 'NITRO Help desk' and contains a sub-section 'Recurring Ticket Templates' with a '+ New' button and a table with columns: Title, Category, Issue Type, Priority, and Requester. Below this is a message: 'There is nothing to show here. Click New to add items.' Below that is a 'Recurring Schedule' section with a '+ New' button and a calendar icon.

## Service Catalog

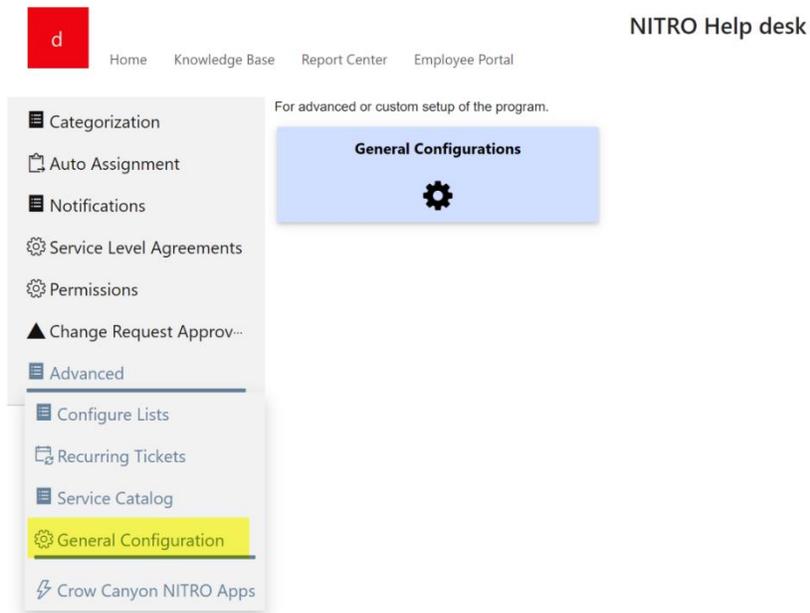
Allows for setting up a Service Catalog that will be accessible to end users via the Employee Portal. The Catalog list is for categorizing the catalog articles. Each multiline text field (e.g., Description, Included, etc) on the Service Catalog list will appear as a separate tab within the Service Catalog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

The screenshot shows the NITRO Help desk interface. The top navigation bar includes 'Home', 'Knowledge Base', 'Report Center', and 'Employee Portal'. A sidebar on the left contains a menu with items like 'Categorization', 'Auto Assignment', 'Notifications', 'Service Level Agreements', 'Permissions', 'Change Request Approv...', 'Advanced', 'Configure Lists', 'Recurring Tickets', 'Service Catalog', 'General Configuration', and 'Crow Canyon NITRO Apps'. The 'Service Catalog' menu item is highlighted in yellow. The main content area is titled 'NITRO Help desk' and contains a sub-section 'Catalog' with a '+ New' button and a table with columns: Title and Icon. Below this is a message: '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.' Below that is a 'Service Catalog' section with a '+ New' button and a table with columns: Title, Banner, Catalog, Show Alw..., and Price. Below this is a message: '1 - 1 of 1 items'.



## General Configuration

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



Click 'General Configuration' tile to see settings as shown below:

Save X Cancel

General Requester Information Knowledge Base Email Handling Extended Settings **Ticket Assignment**

**Title\*** Configurations - Service Request

**Product**  
 Service Request  
 Customer Service

**Tickets List Name** Tickets

**Case Id Format**

Specify the prefix to parse the Ticket ID in the incoming/outgoing emails. E.g. specify value as "Ticket Id:" for syntax [Ticket Id:XXXX] in the mail subject

**Ticket Link Description** Click here to see more details

**Ticket URL** https://crowcanyonsoftware.sharepoint.com/sites/demo2/NITROHelpdesk/SitePages/CCSDisplayForm.aspx?ListID=fda0247f-5f9a-4ff8-84fb-67518d31a857&ItemID=<<ID>>

**Portal Ticket Link URL** https://crowcanyonsoftware.sharepoint.com/sites/demo2/NITROHelpdesk/Portal/SitePages/CCSDisplayForm.aspx?ItemID=<<ID>>&FormKey=PortalTicket&WebURL=https://crowcanyonsoftware.sharepoint.com/sites/demo2/NITROHelpdesk&ListID={fda0247f-...

**Portal Ticket Link Description** Click here to see more details

**SR Logs Retention Days** 90.00

Save Cancel

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:

General Requester Information Knowledge Base Email Handling Extended Settings Ticket Assignment

Fill Requester Information

Read Information From  SharePoint User Profile

Requester meta data column1 Requester Email

Property1 WorkEmail

Requester meta data column2 Requester Phone

Property2 WorkPhone

Requester meta data column3 Requester Department

Property3 Department

Requester meta data column4

Property4

Requester meta data column5

Property5

Save Cancel

### **Knowledge Base Tab:**

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

Save Cancel

General Requester Information Knowledge Base Email Handling Extended Settings Ticket Assignment

KB Mappings

Title=Title  
 Category1=Category1  
 IssueType=IssueType  
 WikiContent=Description 1  
 Resolution=Resolution  
 ResolutionNotes=ResolutionNotes

Save Cancel

### **Email Handling:**

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

Save X Cancel

General Requester Information Knowledge Base **Email Handling** Extended Settings Ticket Assignment

**Email Tickets Lists Names**

**Close Ticket If Subject Starts With**

**Close Ticket If Subject Ends With**

**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 For 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**   
 Update the Ticket work log based on the latest email content

**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/>

Save Cancel

**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:**

Save X Cancel

General Requester Information Knowledge Base Email Handling Extended Settings Ticket Assignment

**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**

```
{
  "Unassigned": {
    "DisplayName": "New",
    "AutoSetOnStaffClear": "Yes"
  },
  "Assigned": {
    "DisplayName": "In Progress",
    "AutoSetOnAssign": "Yes",
    "SetFirstAssignedDate": "Yes"
  }
}
```

Status values for Ticket.

**Out of Office Information**

OOFEnabled=Yes  
OOFCalendarListName=Calendar  
OOFCategoryField=Category  
OOFCategoryFilter=OOF  
OOFTechUserField=OOFTech

**Status Tracking Settings**

```
{
  "EnableStatusTracking": true,
  "StatusTrackingListName": "Tickets Status Tracking",
  "EventsToTrack": {
    "Status": true,
    "Staff": true,
  }
}
```

**KPI Settings**

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

Save Cancel

**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:

Save
Cancel

General

Requester Information

Knowledge Base

Email Handling

Extended Settings

Ticket Assignment

**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 Configurations**

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**

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

Save

Cancel

**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.

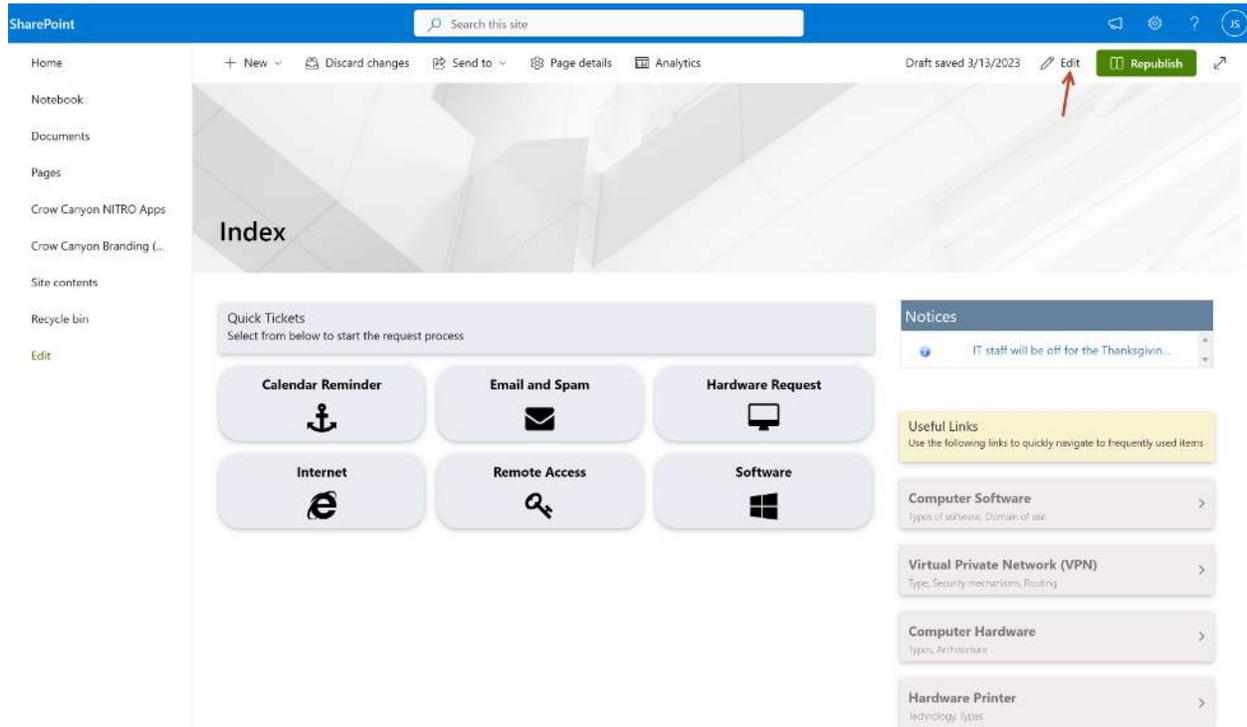
Enable/Disable above process to run in async process.

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

**Employee Portal**  
To create and track Tickets or find knowledge base article - the Helpdek is here to help. Select from below to start the request process

Home Submit New Ticket View My Tickets Knowledge Base Service Catalog Dashboard

Home Page and Theme Configure Apps and Pages Portal Forms Notices NITRO Site Settings General Settings

Quick Tickets Useful Links Site Title, Description, and Logo

Branding

## Home Page and Theme

**Employee Portal**  
To create and track Tickets or find knowledge base article - the Helpdek is here to help. Select from below to start the request process

Home Submit New Ticket View My Tickets Knowledge Base Service Catalog Dashboard

Home Page and Theme Configure Apps and Pages Portal Forms Notices NITRO Site Settings General Settings

Quick Tickets Useful Links Site Title, Description, and Logo

Branding

**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:

**Employee Portal**  
To create and track Tickets or find knowledge base article - the Helpdek is here to help. Select from below to start the request process

Home Submit New Ticket View My Tickets Knowledge Base Service Catalog Dashboard

Home Page and Theme Configure Apps and Pages Portal Forms Notices NITRO Site Settings General Settings

List Views Reports List Search

List Rollup Tiles & Dials Add Workspace Page  
Add a new site page in Site Pages library and add required NITRO components to it.

**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.

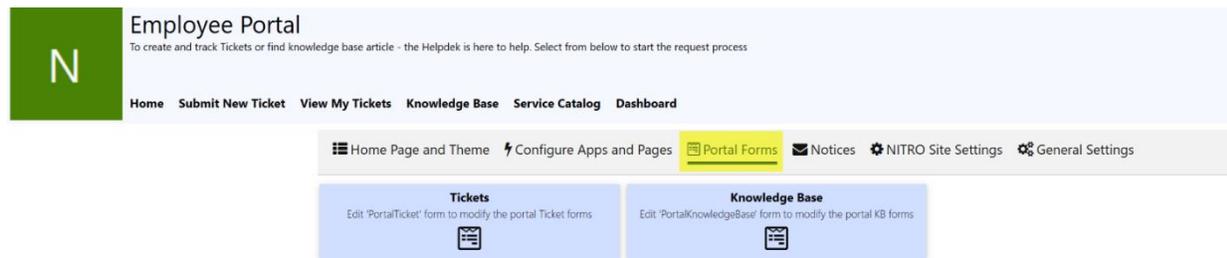
**List Rollup:** To configure 'List Rollup' click this tile.

**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:

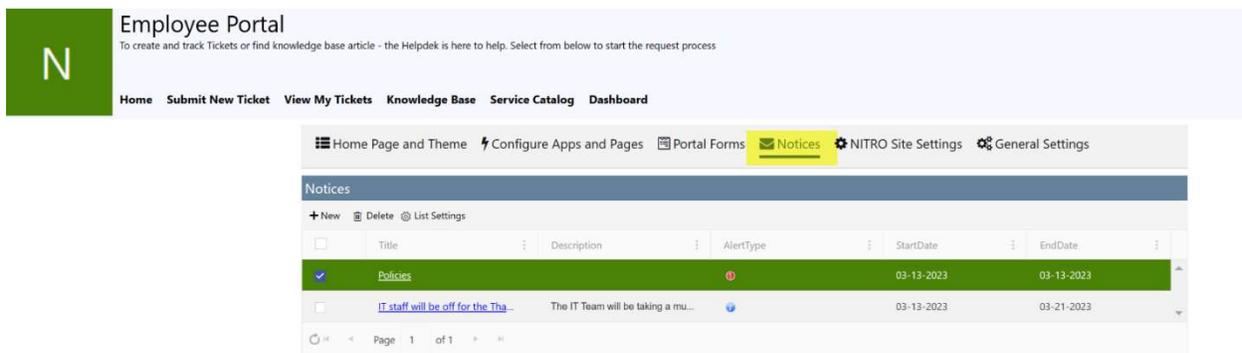


**Tickets:** To modify Portal Ticket forms, edit 'PortalTicket' by clicking this tile.

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

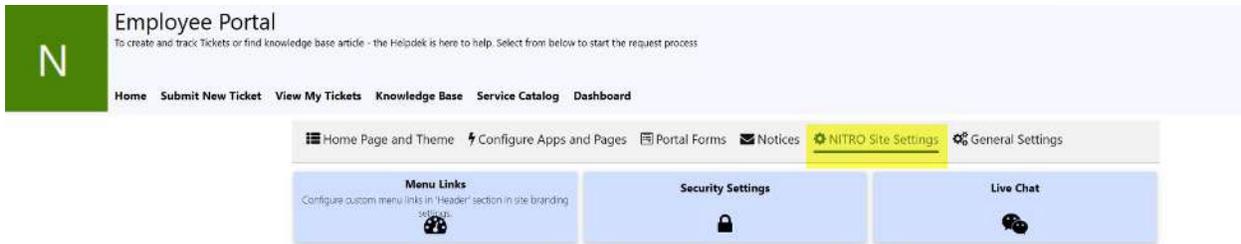
## Notices

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

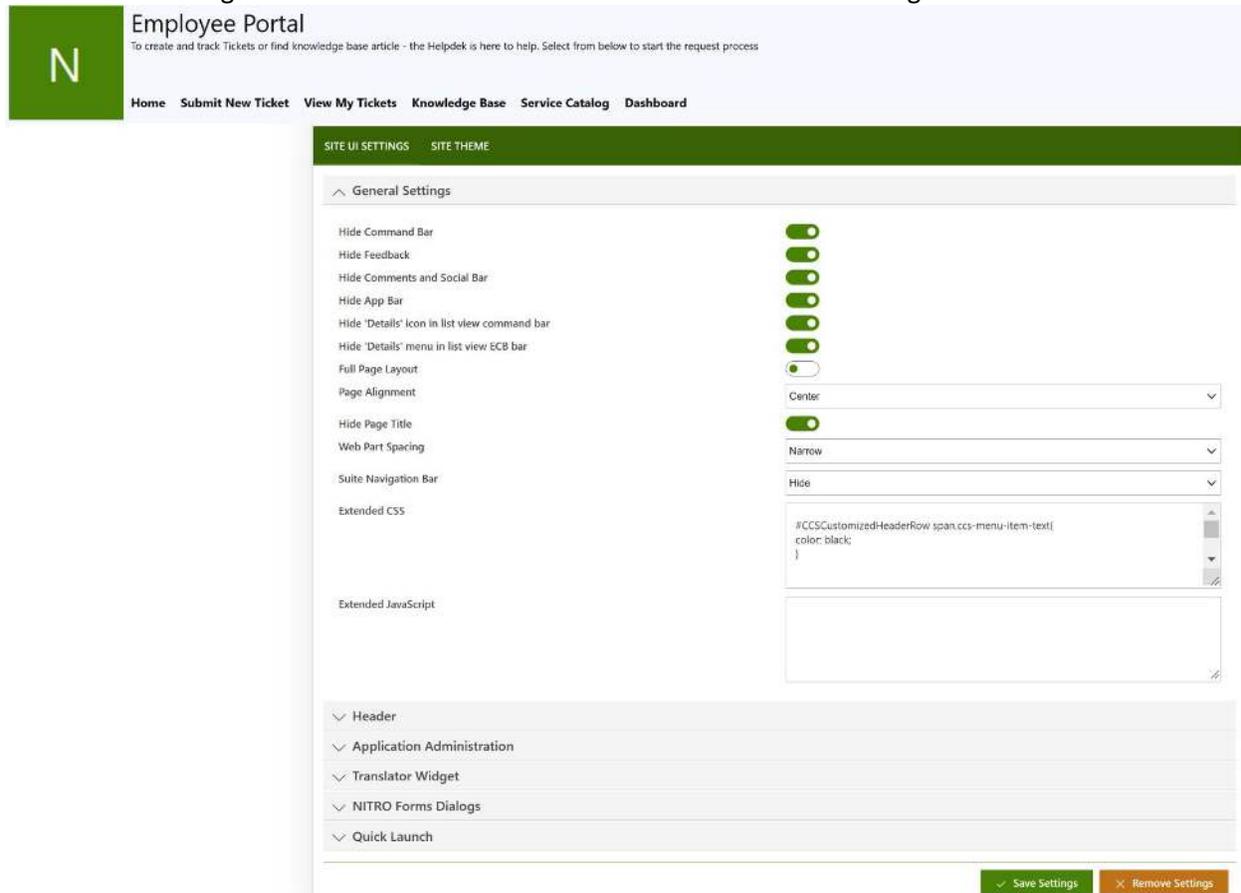


## NITRO Site Settings

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.

## Manage Site-level NITRO Configurations

- ▼ General Settings
- ▼ Regional Time Settings
- ▼ Cache Site Metadata
- ▼ NITRO Utility
- ▼ List Actions Security Settings
- ▼ Live Chat Integration
- ▲ Security Settings

**Configure settings to automatically redirect selected users from sites in this site collection**

Users will be redirected to the specified URL when they browse to any page in the site

Select Site

(Users will be redirected on navigating to this site as per configured settings)

-- Select Site --

Target URL

Access policy

Allow group members to access site  Disallow group members to access site

Users who are members of one or more of specified groups will be redirected to target URL. All other users will be able to access the selected site and will not be redirected.

Groups

Enter names or email addresses...

Manual

Save Settings

Remove Settings

- ▼ Teams Connection Settings
- ▼ Twilio SMS API Connection Settings
- ▼ Azure Active Directory Connection Settings
- ▼ DocuSign API Connection Settings

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

## Manage Site-level NITRO Configurations

- ▼ General Settings
- ▼ Regional Time Settings
- ▼ Cache Site Metadata
- ▼ NITRO Utility
- ▼ List Actions Security Settings
- ▲ Live Chat Integration

Chat Engine

-- Select Bot--

Manual

Save Settings

Remove Settings

- ▼ Security Settings
- ▼ Teams Connection Settings
- ▼ Twilio SMS API Connection Settings
- ▼ Azure Active Directory Connection Settings
- ▼ DocuSign API Connection Settings

## General Settings

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

The screenshot shows the Employee Portal configuration interface. At the top left is a green square with a white 'N'. Below it is the text 'Employee Portal' and a sub-header 'To create and track Tickets or find knowledge base article - the Helpdesk is here to help. Select from below to start the request process'. A navigation bar includes links for Home, Submit New Ticket, View My Tickets, Knowledge Base, Service Catalog, and Dashboard. Below this is a grid of configuration tiles. The 'General Settings' tile is highlighted in yellow. Other tiles include 'NITRO Site Settings' (with a gear icon and subtext 'Configure Regional settings, Metadata caching and Live Chat integrations etc.'), 'SharePoint Site Settings' (with a hierarchy icon), 'Tickets Site Permissions' (with a gear icon), 'Portal Site Permissions' (with a wrench icon), and 'Crow Canyon NITRO Apps' (with a lightning bolt icon).

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

### Manage Site-level NITRO Configurations

#### ^ General Settings

Cross-site Classic Forms  Default  New Experience

Specify 'New Experience' to use common NITRO Forms installed in the current site. With 'Default' option, NITRO Forms installed for the specific list in the source site will be used. Note that Modern UI forms always use 'New Experience'.

Enabled locale based formatting  Yes  No

Display numbers as per the locale specified in site regional settings.



- ✓ Regional Time Settings
- ✓ Cache Site Metadata
- ✓ NITRO Utility
- ✓ List Actions Security Settings
- ✓ Live Chat Integration
- ✓ Security Settings
- ✓ Teams Connection Settings
- ✓ Twilio SMS API Connection Settings
- ✓ Azure Active Directory Connection Settings
- ✓ DocuSign API Connection Settings

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



EDIT LINKS

# Site Settings

Home

Notebook

Documents

Pages

Recent

CCSAdvancedApproval  
ogCCSWFHistory\_Commo  
n\_ErrorLogs

NITROUserPreferences

CrowCanyonAppsLib

Workspaces

Crow Canyon NITRO Apps

Crow Canyon Branding  
(Modern sites)

Site contents

Recycle Bin

EDIT LINKS

Users and Permissions

People and groups

Site permissions

Site app permissions

Web Designer Galleries

Site columns

Site content types

Master pages

Composed looks

Site Administration

Regional settings

Language settings

Export Translations

Import Translations

Site libraries and lists

User alerts

RSS

Sites and workspaces

Workflow settings

Crow Canyon Branding (Modern sites)

Crow Canyon NITRO Workflow

Crow Canyon Tiles and Dials

Crow Canyon NITRO Site Settings

Crow Canyon List View

Crow Canyon NITRO Apps

Crow Canyon List Rollup

Crow Canyon Custom Actions

Crow Canyon Branding (Classic sites)

Crow Canyon NITRO Reports

Crow Canyon List Search

Term store management

Popularity Trends-Alert\*

Search

Result Sources

Result Types

Query Rules

Schema

Search Settings

Search and offline availability

Configuration Import

Configuration Export

Look and Feel

Title, description, and logo

Quick launch

Top link bar

Navigation Elements

Change the look

Site Actions

Manage site features

Save site as template

Enable search configuration export

Reset to site definition

Delete this site

Site Collection Administration

Go to top level site settings

Microsoft Search

Configure search settings

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

The screenshot shows the 'PERMISSIONS' ribbon in a SharePoint interface. The ribbon includes the following options: 'Delete unique permissions' (Inheritance), 'Grant Permissions' (Grant), 'Create Group' (Grant), 'Edit User Permissions' (Modify), 'Remove User Permissions' (Modify), 'Check Permissions' (Check), and 'Access Request Settings' (Manage). Below the ribbon, a yellow warning banner states 'This web site has unique permissions.' To the left, there is a 'Tickets' section with links for 'New Ticket', 'All Tickets', 'Search Tickets', and 'New KB Article'. To the right, there is a table with columns for 'Name', 'Type', and 'Permission Levels'. The table contains two entries: 'Name' with 'User' as the type and 'Full Control' as the permission level, and 'SharePoint App' with 'User' as the type and 'Full Control' as the permission level.

**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:

Case Id	Category	Issue Type	Requester	Priority	Assigned Staff
53	Hardware Request	Keyboard	Carolyn McDonnell-Forester	Normal	James Restivo
52			Krista White	Low	Ryan Stefani
51			Krista White	Normal	Enoch Robey
50			Sudheer Pothula	Low	Enoch Robey
45	Hardware Problem	Audio/Visual	Crow Canyon Support	Normal	Enoch Robey
44	Email	Address Book	Crow Canyon Support	Normal	James Restivo
43	Calendar	Calendar Delegation	Crow Canyon Support	Normal	
42	Email	Spam	Gopi Kanneboiyena	Normal	
41	Calendar	Reminders	Gopi Kanneboiyena	Normal	
40	Software	Adobe product	Gopi Kanneboiyena	Low	
38	WAN	Router Problems	Gopi Kanneboiyena	High	James Restivo
37	Printing	Paper Jam	Gopi Kanneboiyena	Low	James Restivo
35	Email	Spam	Gopi Kanneboiyena	Normal	James Restivo
34	Calendar	Reminders	Gopi Kanneboiyena	High	James Restivo
33	Email	Spam	James Restivo	High	Gopi Kanneboiyena
32	WAN	Router Problems	James Restivo	Normal	Gopi Kanneboiyena
30	Email	Spam	James Restivo	Low	James Restivo
25	Hardware Request	Audio/Visual	Carolyn McDonnell-Forester	Normal	Enoch Robey

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:

**Tickets - Wan router problem**

Edit Delete Close Version History Send Email Print Self Assign 1 of 20

Employee	Staff	Work Log	Knowledge Base	Related Items
<b>Case Id</b>	38			
<b>Title*</b>	Wan router problem			
<b>Category</b>	<u>WAN</u>			
<b>Issue Type</b>	<u>Router Problems</u>			
<b>Additional Information</b>				
<b>Description</b>				
<b>Requester</b>	<input type="checkbox"/> Gopi Kanneboyena			
<b>Requester Email</b>	gopi@crowcanyon.com			
<b>Requester Phone</b>	919059119772			
<b>Requester Department</b>	Support			
<b>Additional Requester Email</b>				
<b>Additional Contact</b>				
<b>Notify Additional Contact</b>	No			

- + Create Problem
- + Create Change Request
- + Resolve
- + Merge Ticket
- + Assign to someone
- + Link to Problem

Created at 02-17-2023 05:53 AM by  Gopi Kanneboyena  
Last modified at 02-17-2023 05:53 AM by  SharePoint App

- **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:

The screenshot shows a web-based form for creating a problem. The form is divided into two tabs: 'General' and 'Advanced'. The 'General' tab is selected. The form fields are as follows:

- Title\***: Wan router problem
- Category**: WAN
- Issue Type**: Router Problems
- Description**: A rich text editor with a toolbar containing options for font, size, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, image, and code.
- Priority**: High
- Status**: Not Started
- Response Due**: month-day-year hour... (with a calendar icon)
- Due Date**: 02-18-2023 (with a calendar icon)

At the bottom of the form, there is an **Attachments** section with a 'Select files...' button. Below the attachments section are two buttons: 'Save' and 'Cancel'.

- **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.

## Create Change Request for item (27 : Email Address Book Issue)

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

## Resolve for item (27 : Email Address Book Issue)

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.

**Tickets - Email Address Book Issue** ↔

Edit Delete Close Version History Send Email Print Self Assign 19 of 32 ↑ ↓ ⋮

Employee	Staff	Work Log	Knowledge Base	Related Items
<b>Case Id</b>	27			
<b>Title*</b>	Email Address Book Issue			
<b>Category</b>	<a href="#">Email</a>			
<b>Issue Type</b>	<a href="#">Address Book</a>			
<b>Additional Information</b>				
<b>Description</b>				
<b>Requester</b>	<input type="checkbox"/> James Restivo			
<b>Requester Email</b>	james.restivo@crowcanyon.com			
<b>Requester Phone</b>	4012842733			
<b>Requester Department</b>	Operations			
<b>Additional Requester Email</b>				
<b>Additional Contact</b>				
<b>Notify Additional Contact</b>	No			

Created at 02-16-2023 10:05 PM by  Gopi Kanneboyena  
Last modified at 03-13-2023 01:30 AM by  SharePoint App

Click 'Merge Ticket' custom action to merge similar Tickets

- + Create Problem
- + Create Change Request
- + Resolve
- + Merge Ticket
- + Assign to someone

Edit Close

- **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:

## Assign to someone for item (27 : Email Address Book Issue)

Assigned Staff

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- **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.

**Tickets - Printer Paper jam**

Edit Delete Close Version History Send Email Print Self Assign 13 of 32

Employee	Staff	Work Log	Knowledge Base	Related Items
<b>Case Id</b>	37			
<b>Title*</b>	Printer Paper jam			
<b>Category</b>	<a href="#">Printing</a>			
<b>Issue Type</b>	<a href="#">Paper Jam</a>			
<b>Additional Information</b>	<div style="border: 1px solid black; border-radius: 15px; padding: 5px; display: inline-block;">           Click 'Link to Problem' custom action to group similar Tickets under the common problem         </div>			
<b>Description</b>				
<b>Requester</b>	<input type="checkbox"/> Gopi Kanneboyena			
<b>Requester Email</b>	gopi@crowcanyon.com			
<b>Requester Phone</b>	919059119772			
<b>Requester Department</b>	Support			
<b>Additional Requester Email</b>				
<b>Additional Contact</b>				
<b>Notify Additional Contact</b>	Yes			

Created at 02-17-2023 05:38 AM by  Gopi Kanneboyena  
Last modified at 03-13-2023 01:30 AM by  SharePoint App

Edit Close

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

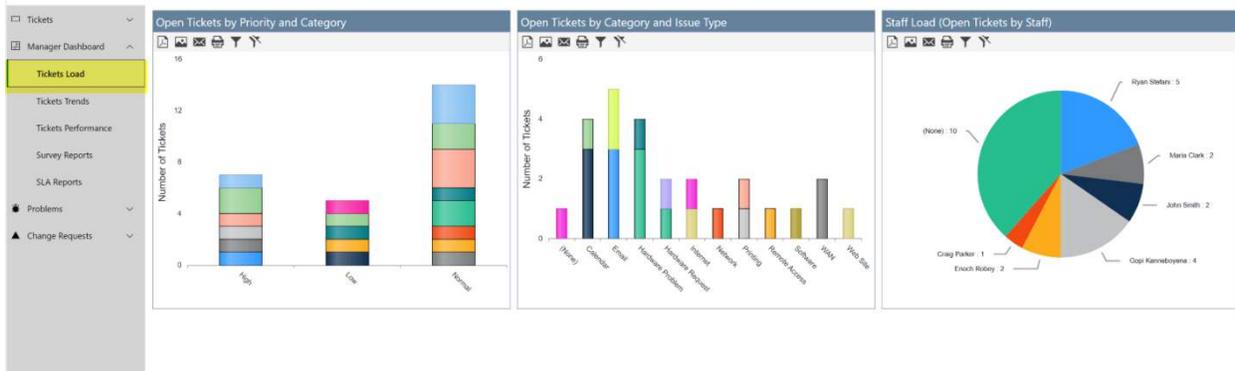
Manager Dashboard can also access additional pages showing detailed reports

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

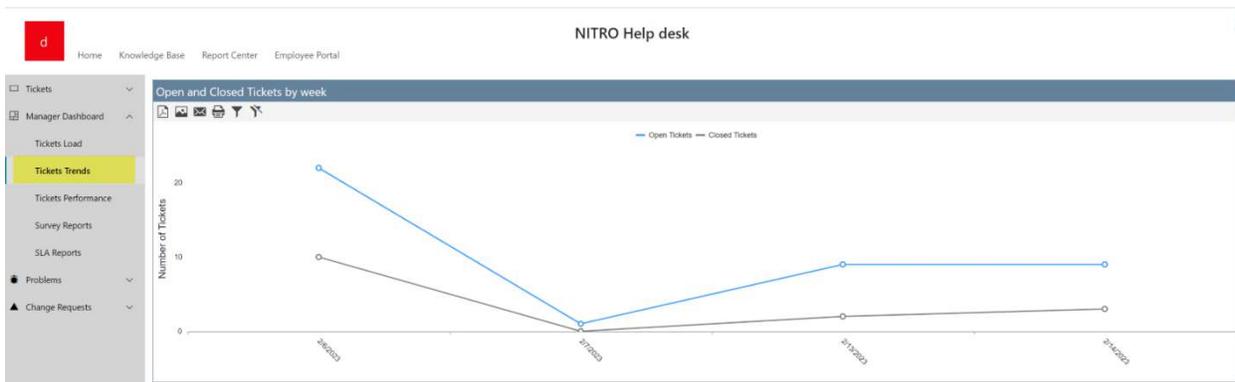
**Tickets Load:** This page shows the Manager how tickets are distributed by different parameters as listed below

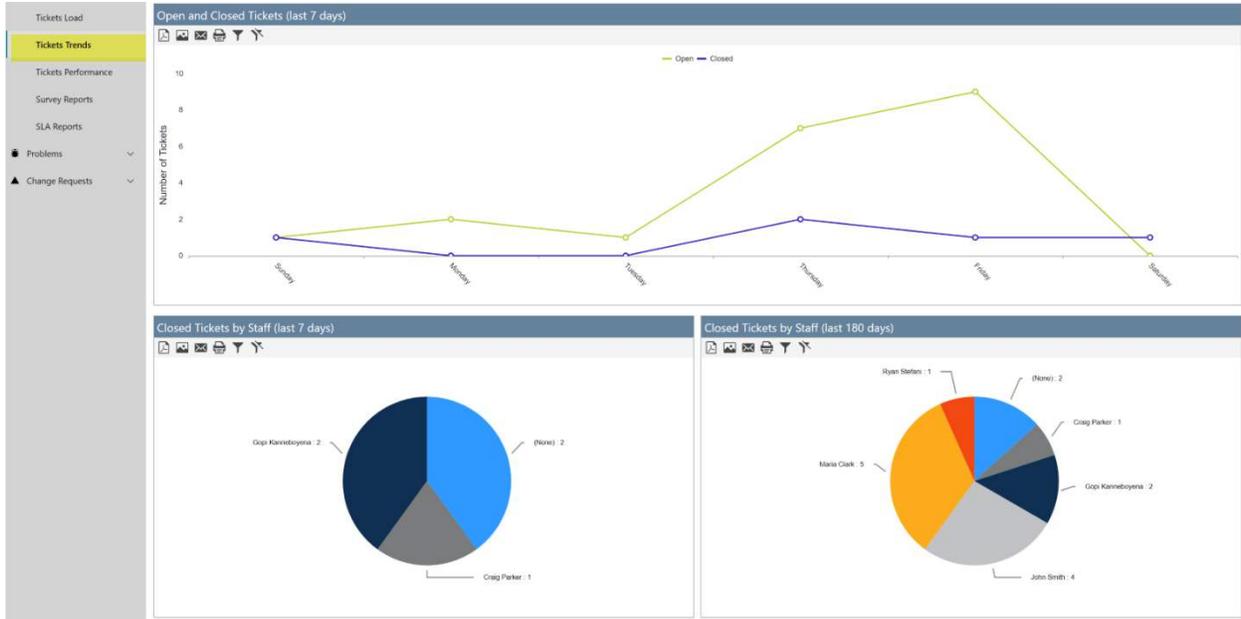
- Open Tickets by Priority and Category
- Open Tickets by Category and Issue Type
- Staff Load (Open Tickets by Staff)



**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

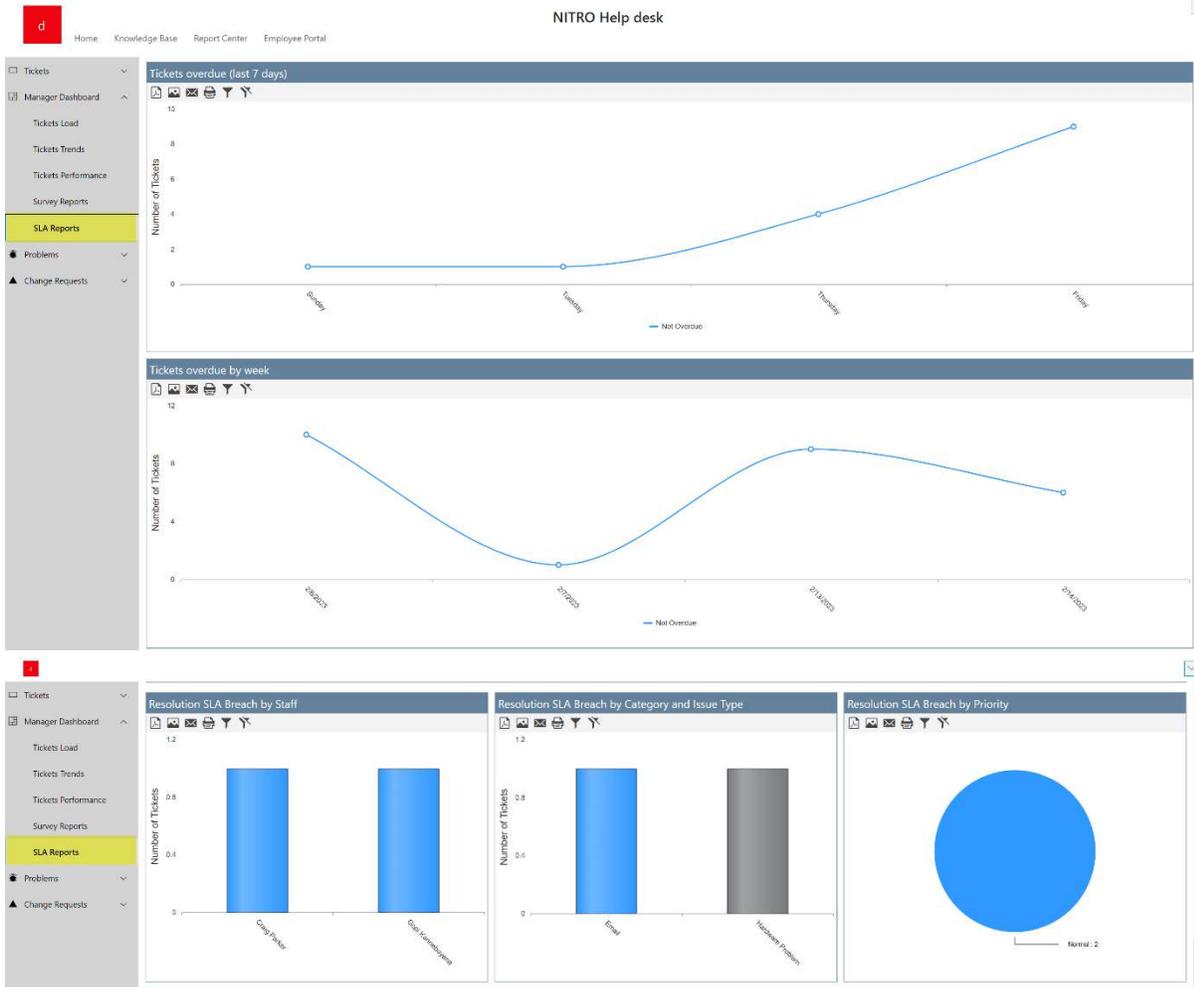
- Service Satisfaction
- Service Quality
- Rating Level by Category
- Satisfaction by Category
- Survey Response per question
- Rating by Staff

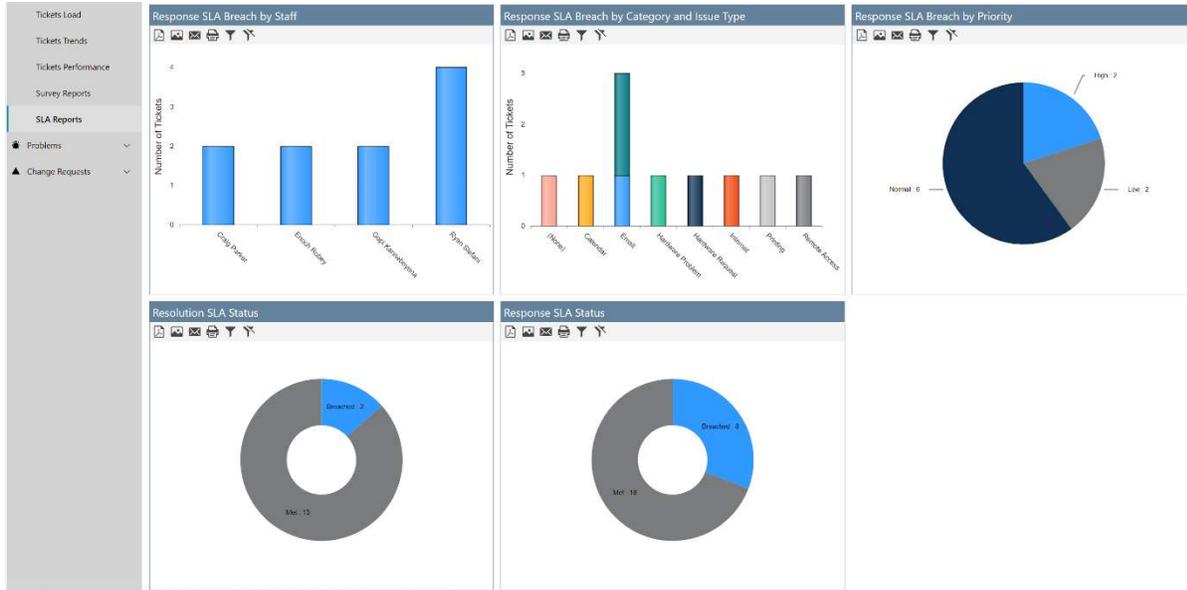


**SLA Reports:** This page shows the Manager SLAs reports under below mentioned categories

- 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



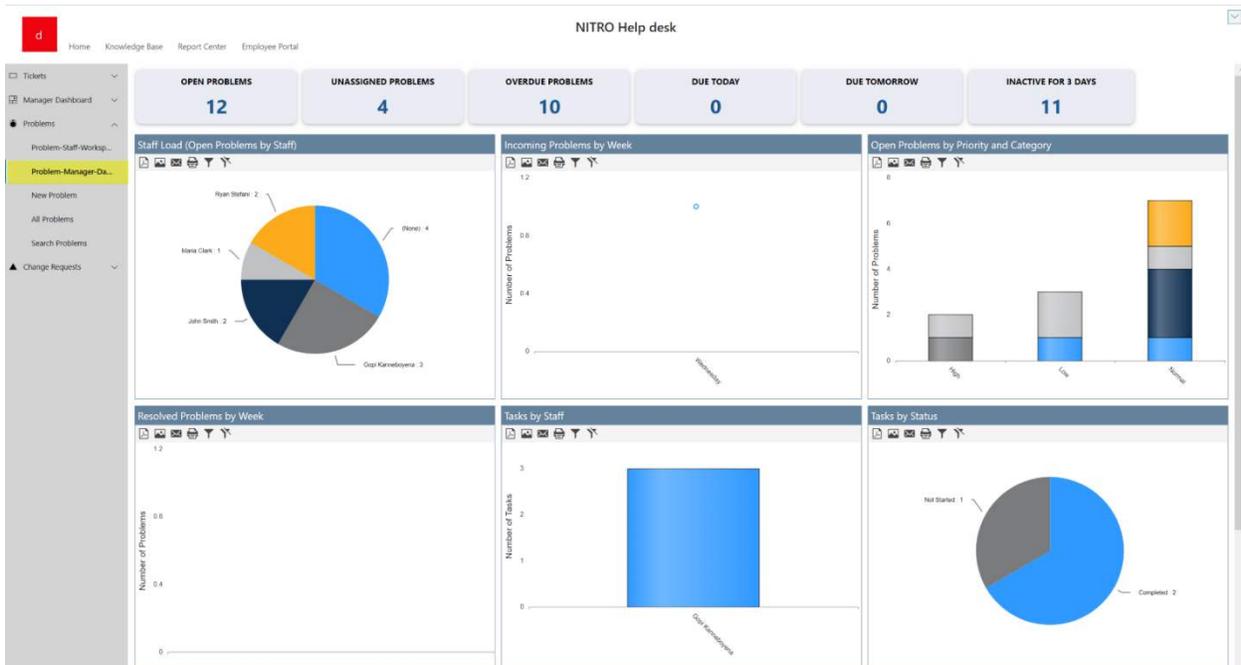


### Problem-Manager-Dashboard

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:



Title	ID	Original Ticket	Due Date	Category	Issue Type	Priority	Assigned Team
<a href="#">Calendar delegation</a>	1		02-06-2023	Calendar	Calendar Delegation	Normal	
<a href="#">Calendar Reminders Issue</a>	10		02-19-2023	Calendar	Reminders	Normal	
<a href="#">Email Address Book Issue</a>	9	Item - 27	02-20-2023	Email	Address Book	High	

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:

[My Assigned Problems](#)
[My Open Tasks](#)
[All Overdue Tasks](#)
[All Unassigned Problems](#)
[All Overdue Problems](#)

### My Assigned Problems

[My Open Problems](#)
[My Overdue Problems](#)
[All My Problems](#)
[Unassigned Problems](#)

[+ New](#) | [Item Print](#) | [List Print](#) | [Delete](#)

<input type="checkbox"/>	Title	ID	Original Ticket	Due Date	Category	Issue Type	Priority	As
<input checked="" type="checkbox"/>	<a href="#">Calendar delegation</a>	1		02-06-2023	Calendar	Calendar Deleg...	Normal	
<input type="checkbox"/>	<a href="#">Calendar Reminders Issue</a>	10		02-19-2023	Calendar	Reminders	Normal	
<input type="checkbox"/>	<a href="#">Email Address Book Issue</a>	9	27	02-20-2023	Email	Address Book	High	

[Page 1 of 1](#) | [20](#) items per page | 1 - 3 of 3 items

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:

**Problems - Calendar delegation** 

 Edit
  Delete
  Close
  Version History
  Print
  Link Tickets to Problem
 1 of 3 ↑ ↓

General **Advanced**

<b>Title*</b>	Calendar delegation
<b>Category</b>	<a href="#">Calendar</a>
<b>Issue Type</b>	<a href="#">Calendar Delegation</a>
<b>Description</b>	Calendar delegation
<b>Priority</b>	Normal
<b>Status</b>	Not Started
<b>Response Due</b>	
<b>Due Date</b>	02-06-2023

Created at 02-06-2023 06:49 AM by  Gopi Kanneboyena  
 Last modified at 02-06-2023 06:49 AM by  Gopi Kanneboyena

Edit Close

- **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:

My Assigned Problems
  My Open Tasks
  All Overdue Tasks
  All Unassigned Problems
  All Overdue Problems

**My Assigned Problems**

[My Open Problems](#)
[My Overdue Problems](#)
[All My Problems](#)
[Unassigned Problems](#)

[+ New](#) | [Item Print](#) | [List Print](#)

<input type="checkbox"/>	Title	ID	Category	Issue Type	Priority	Assigned Team	Status
<input type="checkbox"/>	<a href="#">Calendar delegation</a>	1	Calendar	Calendar Deleg...	Normal		Not Started
<input type="checkbox"/>	<a href="#">Calendar Reminders Issue</a>	10	Calendar	Reminders	Normal		In Progress

[Page 1 of 1](#) | 20 items per page | 1 - 2 of 2 items

## 3. All My Problems

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

My Assigned Problems
  My Open Tasks
  All Overdue Tasks
  All Unassigned Problems
  All Overdue Problems

**My Assigned Problems**

[My Open Problems](#)
[My Overdue Problems](#)
[All My Problems](#)
[Unassigned Problems](#)

[+ New](#) | [Item Print](#) | [List Print](#)

<input type="checkbox"/>	Title	ID	Category	Issue Type	Priority	Assigned Team	Status
<input type="checkbox"/>	<a href="#">Calendar delegation</a>	1	Calendar	Calendar Deleg...	Normal		Not Started
<input type="checkbox"/>	<a href="#">Calendar Reminders Issue</a>	10	Calendar	Reminders	Normal		In Progress
<input type="checkbox"/>	<a href="#">Email Address Book Issue</a>	9	Email	Address Book	High		Not Started

## 4. Unassigned Problems

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

My Assigned Problems
  My Open Tasks
  All Overdue Tasks
  All Unassigned Problems
  All Overdue Problems

**My Assigned Problems**

[My Open Problems](#)
[My Overdue Problems](#)
[All My Problems](#)
[Unassigned Problems](#)

[+ New](#) | [Item Print](#) | [List Print](#)

<input type="checkbox"/>	Title	ID	Category	Issue Type	Priority
<input type="checkbox"/>	<a href="#">Printing not working</a>	6	Printing	Can't Print	Low

### My Open Tasks

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

My Assigned Problems
  **My Open Tasks**
 All Overdue Tasks
  All Unassigned Problems
  All Overdue Problems

**My Open Tasks**

+ New | Item Print | List Print

	Task Name	Due Date	Related Problem
<input type="checkbox"/>	<a href="#">Calendar Reminder Task</a>	02-19-2023	10
<input type="checkbox"/>	<a href="#">Printer Task</a>	02-20-2023	2
<input type="checkbox"/>	<a href="#">Email Task</a>	02-19-2023	4

Page 1 of 1
20 items per page
1 - 3 of 3 items

### 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

My Assigned Problems
  My Open Tasks
  **All Overdue Tasks**
 All Unassigned Problems
  All Overdue Problems

**All Overdue Tasks**

+ New | Item Print | List Print

	Task Name	Due Date	Assigned To	Related Problem
<input type="checkbox"/>	<a href="#">Calendar Reminder Task</a>	02-19-2023	Gopi Kanneboyena	10

Page 1 of 1
20 items per page
1 - 1 of 1 items

### All Unassigned Problems

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

My Assigned Problems
  My Open Tasks
  All Overdue Tasks
  **All Unassigned Problems**
 All Overdue Problems

**All Unassigned Problems**

+ New | Item Print | List Print

	Title	ID	Category	Issue Type	Priority
<input type="checkbox"/>	<a href="#">Printing not working</a>	6	Printing	Can't Print	Low

Page 1 of 1
20 items per page
1 - 1 of 1 items

### All Overdue Problems

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

My Assigned Problems My Open Tasks All Overdue Tasks All Unassigned Problems All Overdue Problems

### All Overdue Problems

+ New | Item Print | List Print

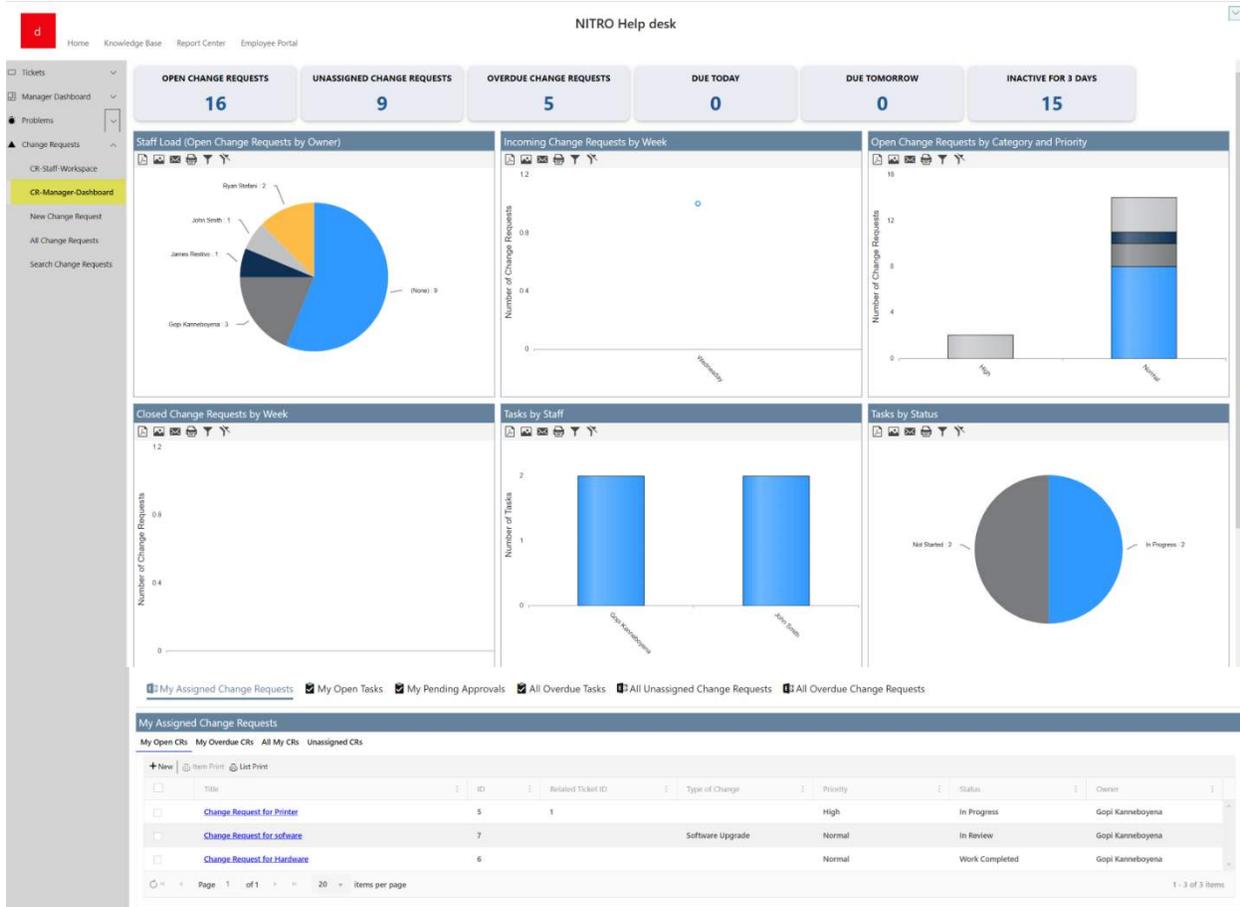
<input type="checkbox"/>	Title	ID	Category	Issue Type	Priority	Assigned Team	Status	Ass
<input type="checkbox"/>	<a href="#">Hardware problem</a>	3	Hardware Proble...	Audio/Visual	Normal		Not Started	Johr
<input type="checkbox"/>	<a href="#">Internet is not working</a>	4	Internet	Browser	High		Not Started	Mar
<input type="checkbox"/>	<a href="#">Calendar delegation</a>	1	Calendar	Calendar Delega...	Normal		Not Started	Gop
<input type="checkbox"/>	<a href="#">Email address issue</a>	2	Email	Address Book	Low		Not Started	Johr
<input type="checkbox"/>	<a href="#">Application Issue</a>	7	Hardware Proble...	Desktop	Normal		Not Started	Ryar
<input type="checkbox"/>	<a href="#">Calendar Reminders Issue</a>	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

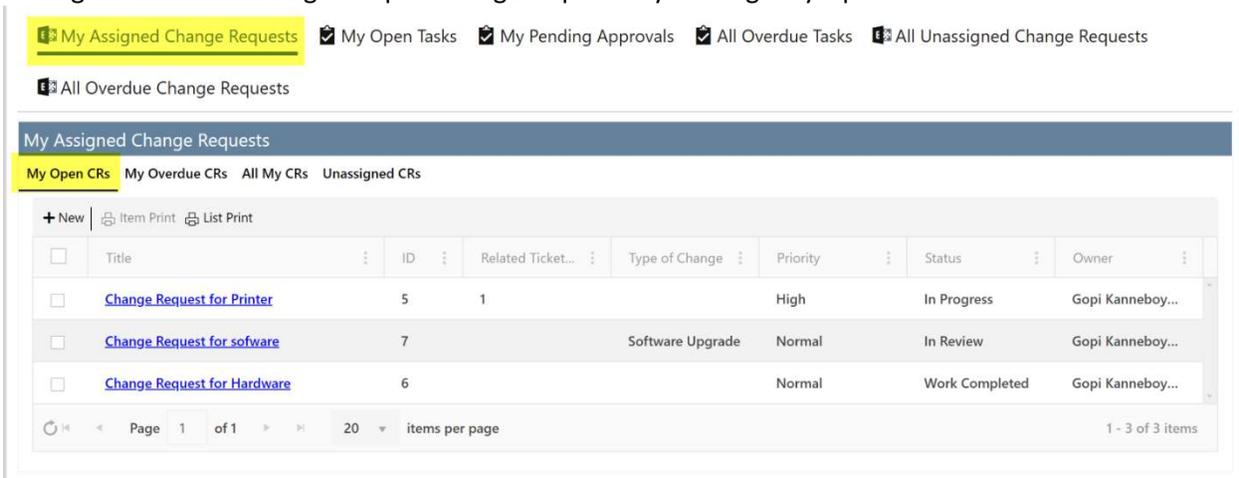
Below views are configured in Tabular view of Problem Manager Dashboard

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:



My Assigned Change Requests | My Open Tasks | My Pending Approvals | All Overdue Tasks | All Unassigned Change Requests

All Overdue Change Requests

My Assigned Change Requests

My Open CRs | My Overdue CRs | All My CRs | Unassigned CRs

+ New | Item Print | List Print

<input type="checkbox"/>	Title	ID	Related Ticket...	Type of Change	Priority	Status	Owner
<input type="checkbox"/>	<a href="#">Change Request for Printer</a>	5	1		High	In Progress	Gopi Kanneboy...
<input type="checkbox"/>	<a href="#">Change Request for software</a>	7		Software Upgrade	Normal	In Review	Gopi Kanneboy...
<input type="checkbox"/>	<a href="#">Change Request for Hardware</a>	6			Normal	Work Completed	Gopi Kanneboy...

Page 1 of 1 | 20 items per page | 1 - 3 of 3 items

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:

My Assigned Change Requests
  My Open Tasks
  My Pending Approvals
  All Overdue Tasks
  All Unassigned Change Requests

All Overdue Change Requests

**My Assigned Change Requests**

My Open CRs **My Overdue CRs** All My CRs Unassigned CRs

+ New | Item Print | List Print

<input type="checkbox"/>	Title	ID	Related Ticke...	Type of Chan...	Status	Request ...	Requester	App
<input type="checkbox"/>	<a href="#">Change Request for software</a>	7		Software Upgra...	In Review	02-01-2023	James Restivo	

## 3. All My CRs

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

My Assigned Change Requests
  My Open Tasks
  My Pending Approvals
  All Overdue Tasks
  All Unassigned Change Requests

All Overdue Change Requests

**My Assigned Change Requests**

My Open CRs My Overdue CRs **All My CRs** Unassigned CRs

+ New | Item Print | List Print

<input type="checkbox"/>	Title	ID	Related Ticke...	Type of Chan...	Status	Request ...	Requester	Ow
<input type="checkbox"/>	<a href="#">Change Request for Printer</a>	5	1		In Progress	02-19-2023	James Restivo	Go
<input type="checkbox"/>	<a href="#">Change Request for software</a>	7		Software Upgra...	In Review	02-01-2023	James Restivo	Go

## 4. Unassigned CRs

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

My Assigned Change Requests
  My Open Tasks
  My Pending Approvals
  All Overdue Tasks
  All Unassigned Change Requests

All Overdue Change Requests

**My Assigned Change Requests**

My Open CRs
  My Overdue CRs
  All My CRs
  Unassigned CRs

<input type="checkbox"/>	Title	ID	Related Ticke...	Type of Chan...	Status	Request ...	Requester	Ow
<input type="checkbox"/>	<a href="#">Change Request for Printer</a>	5	1		In Progress	02-19-2023	James Restivo	Goj
<input type="checkbox"/>	<a href="#">Change Request for software</a>	7		Software Upgra...	In Review	02-01-2023	James Restivo	Goj

### My Open Tasks

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

My Assigned Change Requests
  **My Open Tasks**
 My Pending Approvals
  All Overdue Tasks
  All Unassigned Change Requests

All Overdue Change Requests

**My Open Tasks**

<input type="checkbox"/>	Task Name	Due Date	Related Change Request
<input type="checkbox"/>	<a href="#">Printer Tasks</a>	02-21-2023	5
<input type="checkbox"/>	<a href="#">Hardware task</a>	02-23-2023	6
<input type="checkbox"/>	<a href="#">Keyboard change task</a>	02-14-2023	6
<input type="checkbox"/>	<a href="#">Software task</a>	02-11-2023	7

1 - 4 of 4 items

### My Pending Approvals

#### 1. My Open Tasks

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

My Assigned Change Requests
  My Open Tasks
  **My Pending Approvals**
 All Overdue Tasks
  All Unassigned Change Requests

All Overdue Change Requests

**My Pending Approvals**

**My Open Tasks**
 My Tasks

<input type="checkbox"/>	Actions	Title	Due Date	Approval Level	Approval Decision	Related Change Requ...
<input type="checkbox"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>	<a href="#">Change Requests for...</a>		Software Approval		Change Requests for M...

1 - 1 of 1 items

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

## Change Requests Approval Tasks - Change Requests for MS- Word -Software ...

Save × Cancel

✓ Approve

✗ Deny

↶ Send Back

## Approval Task

Title\*

Change Requests for MS- Word -Software Approval

Approval Level

Software Approval

Assigned To

Gopi Kanneboyena

Due Date

month-day-year



Related Change Request

Change Requests for MS- Word

Description

Comments

Save

Cancel

## 2. My Tasks

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

- My Assigned Change Requests
- My Open Tasks
- My Pending Approvals**
- All Overdue Tasks
- All Unassigned Change Requests
- All Overdue Change Requests

**My Pending Approvals**

My Open Tasks **My Tasks**

Item Print List Print

<input type="checkbox"/>	Actions	Title	Due Date	Approval Level	Approval Decision	Related Change Requ...
<input type="checkbox"/>		<a href="#">Change Requests for ...</a>		Software Approval		Change Requests for M...
<input type="checkbox"/>		<a href="#">Change Request for s...</a>		Software Approval	Approved	Change Request for sof...

### All Overdue Tasks

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

- My Assigned Change Requests
- My Open Tasks
- My Pending Approvals
- All Overdue Tasks**
- All Unassigned Change Requests
- All Overdue Change Requests

**All Overdue Tasks**

+ New

<input type="checkbox"/>	Task Name	Due Date	Assigned To	Related Change Request
<input type="checkbox"/>	<a href="#">Software task</a>	02-11-2023	Gopi Kanneboyena	7

Page 1 of 1 items per page 1 - 1 of 1 items

### All Unassigned Change Requests

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

- My Assigned Change Requests
- My Open Tasks
- My Pending Approvals
- All Overdue Tasks
- All Unassigned Change Requests**
- All Overdue Change Requests

**All Unassigned Change Requests**

+ New Item Print List Print

<input type="checkbox"/>	Title	ID	Related Ticke...	Type of Chan...	Status	Request ...	Requester	Approve
<input type="checkbox"/>	<a href="#">Software Upgrade</a>	1			In Review	02-09-2023	Ryan Stefani	
<input type="checkbox"/>	<a href="#">CR for Software</a>	3	8	Software Upgrade	In Review	02-17-2023		

### All Overdue Change Requests

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

[3 My Assigned Change Requests](#)
[3 My Open Tasks](#)
[3 My Pending Approvals](#)
[3 All Overdue Tasks](#)
[3 All Unassigned Change Requests](#)

**3 All Overdue Change Requests**

All Overdue Change Requests									
+ New   Item Print   List Print									
<input type="checkbox"/>	Title	ID	Related Ticke...	Type of Chan...	Status	Request ...	Requester	Approve	
<input type="checkbox"/>	<a href="#">Software Upgrade</a>	1			In Review	02-09-2023	Ryan Stefani		
<input type="checkbox"/>	<a href="#">Change Request for software</a>	7		Software Upgrade	In Review	02-01-2023	James Restivo		

## 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:

**Employee Portal**  
 To create and track Tickets or find knowledge base article - the Helpdesk is here to help. Select from below to start the request process  
 Monday, March 13, 2023 7:06 PM

[Home](#)
[Submit New Ticket](#)
[View My Tickets](#)
[Knowledge Base](#)
[Service Catalog](#)
[Dashboard](#)

**Quick tickets**  
 Select from below to start the request process

- Calendar Reminder
- Email and Spam
- Hardware Request
- Internet
- Remote Access
- Software

**Notices**

- Policies
- IT staff will be off for the Thanksgiving h...

**Useful Links**  
 Use the following links to quickly navigate to frequently used items

- Computer Software  
Types of software, Domain of use
- Virtual Private Network (VPN)  
Type, Security mechanisms, Routing
- Computer Hardware  
Types, Architecture
- Hardware Printer  
Technology, Types

**Search Tickets**

Search Tickets [Search] [Saved Filters]

Enter text above to search items.

## 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.

**Employee Portal**  
To create and track Tickets or find knowledge base article - the Helpdek is here to help. Select from below to start the request process

Monday, March 13, 2023 7:07 PM

Home **Submit New Ticket** View My Tickets Knowledge Base Service Catalog Dashboard

Quick Tickets   
Select from below to start the request process

Calendar Reminder Email and Spam Hardware Request  
Internet Remote Access Software

Notices  
Policies  
IT staff will be off for the Thanksgiving h...

Useful Links  
Use the following links to quickly navigate to frequently used items

Computer Software  
Types of software, Domain of use

Virtual Private Network (VPN)  
Type: Security mechanisms, Routing

Computer Hardware  
Types, Architecture

Hardware Printer  
Technology, Types

Search Tickets  
Search Tickets

Enter text above to search items.

## 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.

**Tickets - New Item** ✕

Save ✕ Cancel 📎 Attach File

**Requester Details** ^

**Requester\***

**Requester Email**

**Requester Phone**

**Requester Department**

**Ticket Details** ^

**Title\***

**Priority**

**Category**

**Issue Type**

Can't connect to Email

**Ticket Description** ^

**Description**

(inherited font) ▼
(inherited size) ▼
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📎

**A** ▼
🔍
🖨️
x<sub>2</sub>
x<sup>2</sup>
📄
</>
Format ▼
✖
🖼️

facing issue in sending and receiving [emails](#).

Save
Cancel

## 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

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.

The screenshot shows the Employee Portal interface. The header includes a green square with the letter 'N', the title 'Employee Portal', and a subtitle 'To create and track Tickets or find knowledge base article - the Helpdesk is here to help. Select from below to start the request process'. The date 'Monday,' is displayed on the right. The navigation menu includes 'Home', 'Submit New Ticket', 'View My Tickets', 'Knowledge Base', 'Service Catalog', and 'Dashboard'. Below the navigation, there are three tabs: 'My Open Tickets', 'My Closed Tickets' (which is highlighted), and 'My Tickets'. A 'View My Tickets' button is also present. The main content area shows a table with the following data:

<input type="checkbox"/>	Title	Case Id	Category	Issue Type	Closed Date
<input type="checkbox"/>	<a href="#">Network Logon Problem</a>	11	<a href="#">Network</a>	<a href="#">Logon Problem</a>	03-13-2023 06:48 AM
<input type="checkbox"/>	<a href="#">Email Virus</a>	10	<a href="#">Email</a>	<a href="#">Virus</a>	03-13-2023 06:47 AM

At the bottom of the table, there is a pagination control showing 'Page 1 of 1' and '20 items per page'. The total number of items is '1 - 2 of 2 items'.

### 3. My Tickets

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

The screenshot shows the Employee Portal interface with the 'My Tickets' view selected. The header and navigation are the same as in the previous screenshot. The 'My Tickets' tab is highlighted. The main content area shows a table with the following data:

<input type="checkbox"/>	Title	Case Id	Issue Type	Requester	Status	Assigned Staff	Ne...
<input type="checkbox"/>	<a href="#">Email Virus</a>	10	<a href="#">Virus</a>	John Smith	Closed	John Smith	
<input type="checkbox"/>	<a href="#">Network Logon Problem</a>	11	<a href="#">Logon Problem</a>	John Smith	Closed	John Smith	
<input type="checkbox"/>	<a href="#">Calendar Meeting Setup</a>	12	<a href="#">Meeting Setup</a>	John Smith	Unassigned		
<input type="checkbox"/>	<a href="#">Email Public folder</a>	13	<a href="#">Public Folders</a>	John Smith	Unassigned		
<input type="checkbox"/>	<a href="#">Hardware Request Copier</a>	14	<a href="#">Copier</a>	John Smith	Assigned	James Restivo	
<input type="checkbox"/>	<a href="#">Internet Proxy Issue</a>	15	<a href="#">Proxy Issue</a>	John Smith	Unassigned		
<input type="checkbox"/>	<a href="#">Remote Access VPN</a>	16	<a href="#">VPN</a>	John Smith	Unassigned		
<input type="checkbox"/>	<a href="#">SoftWare MS Office</a>	17	<a href="#">MS Office</a>	John Smith	Assigned	James Restivo	
<input type="checkbox"/>	<a href="#">Internet Proxy Issue</a>	18	<a href="#">Proxy Issue</a>	John Smith	Unassigned		
<input type="checkbox"/>	<a href="#">Email Outlook client</a>	19	<a href="#">Outlook Client</a>	John Smith	Unassigned		
<input type="checkbox"/>	<a href="#">Calendar Can't book room</a>	20	<a href="#">Can't book room</a>	John Smith	Unassigned		

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.

The screenshot shows the 'Employee Portal' interface. At the top left is a green square with a white 'N'. Below it is the text 'Employee Portal' and a subtitle: 'To create and track Tickets or find knowledge base article - the Helpdesk is here to help. Select from below to start the request process.' A navigation bar includes links for 'Home', 'Submit New Ticket', 'View My Tickets', 'Knowledge Base' (highlighted), 'Service Catalog', and 'Dashboard'. A search box labeled 'Knowledge Base' with a magnifying glass icon is positioned above the main content area. The content is divided into three sections: 'Frequently Used Articles' with links for 'Can't connect to Email' and 'Printer is not working'; 'Top Rated Articles'; and 'Articles by Category' with three categories: 'Email (1)' (containing 'Can't connect to Email'), 'Hardware Problem (2)' (containing 'Issue with Zoom/Teams IP Phone' and 'My PC Crashes'), and 'Printing (1)' (containing 'Printer is not working').

**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.

The screenshot shows the 'Employee Portal' interface with the 'Service Catalog' link highlighted in the navigation bar. The search box is labeled 'Service Catalog'. The main content area is divided into two sections: 'Common Services' with a link for 'Find People', and 'Catalogs' with a link for 'Account & ID Management Service...' and another 'Find People' link.

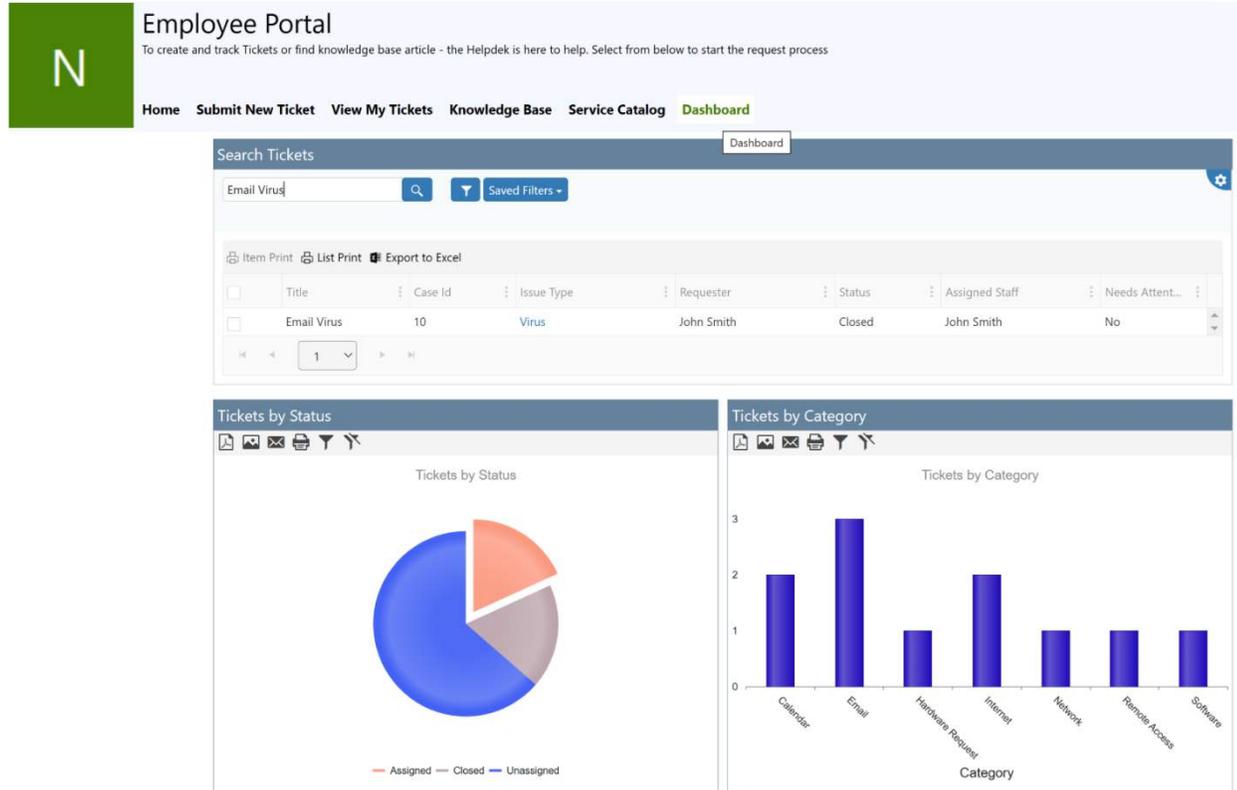
## Dashboard

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.

**Search Tickets:** 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.

**Ticket by Status:** This section will graphically depict the Tickets categorized by status in a pie-chart.

**Ticket by Category:** This section will graphically depict the Tickets grouped by category as a bar graph.



The screenshot shows the Employee Portal dashboard. At the top, there is a navigation bar with links: Home, Submit New Ticket, View My Tickets, Knowledge Base, Service Catalog, and Dashboard. Below this is a search bar with the text "Email Virus" and a "Saved Filters" button. A table below the search bar displays search results for "Email Virus".

Item	Title	Case Id	Issue Type	Requester	Status	Assigned Staff	Needs Attent...
<input type="checkbox"/>	Email Virus	10	Virus	John Smith	Closed	John Smith	No

Below the table are two charts:

- Tickets by Status:** A pie chart showing the distribution of tickets by status. The legend indicates: Assigned (orange), Closed (grey), and Unassigned (blue). The Unassigned status is the largest, followed by Assigned, and then Closed.
- Tickets by Category:** A bar chart showing the number of tickets for each category. The categories and their counts are: Calendar (2), Email (3), Hardware Request (1), Internet (2), Network (1), Remote Access (1), and Software (1).

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.

Quick Tickets  
Select from below to start the request process

Click the tile to create Ticket with required category

<b>Calendar Reminder</b> 	<b>Email and Spam</b> 	<b>Hardware Request</b> 
<b>Internet</b> 	<b>Remote Access</b> 	<b>Software</b> 

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.



## Useful Links

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

### Useful Links

Use the following links to quickly navigate to frequently used items

#### **Computer Software**

Types of software, Domain of use



#### **Virtual Private Network (VPN)**

Type, Security mechanisms, Routing



#### **Computer Hardware**

Types, Architecture



#### **Hardware Printer**

Technology, Types

