The Help Desk for SharePoint 2007 End User Guide

Solution Description

This solution is comprised of a single site that is used to process internal Help Desk requests. From the submittal of a request through the complete life cycle, it provides the structure and task automation to make your Help Desk rich and productive.

This solution covers the full life cycle of a Help Desk request, including:

- Submittal of the requests and self-service, with the ability to distribute the self-service “workplace feature” to anywhere in your workplace that is convenient to users.
- The management of the assignment of the support request.
- The process of working on the request and the easy management of the work by support engineers with their tasks automated through pre-configured actions.
- The ability to turn a help request into a larger work item with associated sub-tasks, and to track the work associated with the request.
- The ability for management to view the status of the Help Desk through charts and reports that they can drill down to.
- The ability to assign Help Desk requests to a Knowledge Base (KB) process for approval and then to publish these articles to a KB either within the Help Desk or externally.

A key part of this solution is the actions that automate the tasks of driving the Help Desk processes. At any step along the way, you can use actions to bring others into the process through Email Notification. You can easily modify these actions or create your own actions to meet the specific needs of your Help Desk.

Solution Category: Line of Business

Primary Design Pattern: Applet

Solution Disclaimer

If you change the name of any list or column that is:

- Viewed in a CorasWorks web part, the web part will no longer display information
- Used in an action, the action will fail
- Used in sending an email with the List Item Emailer, the email will not work

Of course, you are free to re-configure these CorasWorks web parts so they will work with your changes (in fact, this ability to customize is encouraged and is a major benefit to CorasWorks solutions), but an understanding of the CorasWorks Builder Framework is required.

Overview of Available Tabs

The Help Desk solution is comprised of several tabs for each role in the process:

- **Home** – The main tab that is displayed when the solution is initially accessed. It includes a welcome message that can include instructions for using the solution, and a display that allows you to enter and monitor your Support requests. A "My Completed Requests" view, available off the Home tab, displays all Support requests entered by the current user that have a status of "Completed."
- **Help Desk Coordinator –** Provides several views of support requests, so a Help Desk Coordinator can manage the distribution of requests. Views are available to see requests by engineer, department, or type, as well as unassigned and completed requests. Actions allow you to assign, modify, and close requests, or send a custom email message with a link to a request.
- **Support Engineers –** Enables the individuals who work on the Help Desk to see a list of all requests that are assigned to them, as well as any tasks that are associated with a request. A "Support Tasks Status" view provides a listing of all tasks associated with support requests, color-coded by status.
- **Department Manager –** Includes several pre-configured charts that provide a high-level view of the status and types of support requests being logged. Additional views list all support requests by age, and in a calendar view by the date on which each request was started.
- **Knowledge Base –** Provides the ability to submit resolved requests to a Knowledge Base process and use actions to publish the articles within the Help Desk or elsewhere in the workplace.

Using the Help Desk Solution

The basic steps of the Help Desk process are:

1. Create a new support request. This can be done via an action on the Home tab or by selecting "Create New Support Requests" from the Workplace Tasks menu.
2. The Help Desk Coordinator uses the "Assign Support Request(s) to an Engineer" action to assign the request.
3. The Support Engineer uses any combination of the available actions to update the support request and/or communicate with the requestor:
   - Close Support Request
   - Modify Support Request Information
   - Send Custom Email Message

Additional tabs, views, and actions provide a wide variety of ways to view and act upon requests, see a high-level view of all requests, and maintain a Knowledge Base.

1. Create a Support Request

1. The first step in the Help Desk process is to submit a support request. There are two ways to do this:
    - On the Home tab, select the **Create a New Support Request** action from the drop-down at the top of the Support Requests I Submitted section and then click Go. An entry form is displayed with the prompts listed in the table below.
    - From any area of the solution, access the Workplace Tasks menu and select **Create New Support Request** from the resulting menu. A page is displayed with the prompts listed in the table below. The page includes additional prompts, but they do not need to be populated at this point. They will be populated as the request moves through the support process.

Prompt	**Description**
Title	A brief title for the support request.
End User	The name of the person making the request.
Product Name	The name of the software or other product that the request is about.
Technology	The technology that the support request primarily refers to. The standard types included in the solution are as follows, but can be changed by your administrator: • Laptop • Desktop • Server • Network • Mobile • Software
Department	The name of the department in which the requestor is located. Several choices are included in the solution, but are expected to be customized for your organization.
Description	A detailed description of the support request.

2. When you are finished entering the above information, click **Go** if entering the request via an action, or select **Save and Close** if entering the request via the Workplace Tasks menu. The request is now included in the "Support Requests I Submitted" display on the Home tab, and it is available for the Help Desk Coordinator to assign to the appropriate Support Engineer.

NOTE: Optional Alerts	Your Help Desk Coordinator(s) may wish to add a SharePoint alert to the Support Requests list, or to a certain view of the Support Requests list. However, this is often unnecessary because the Coordinator is in the application frequently enough to see the items without an email notification.

2. Assign the Support Request

Once a support request has been entered, it needs to be assigned to someone to resolve. There are several views available to the Help Desk Coordinator, several of which include an action that makes it easy to assign a support request to a Support Engineer.

1. Access any of these views to see the support request:
   - Help Desk Coordinator (main view)
   - Help Desk Coordinator/By Department
   - Help Desk Coordinator/By Type
2. Place a check mark to the left of the request you wish to assign, select the **Assign Support Request(s) to an Engineer and Notify** action, and then click **Go**.
3. An action entry form is displayed with prompts for the following information:
   - Description
   - Priority
   - Assigned To
4. Enter the requested information (required fields are marked with a red asterisk) and then click **Go**. A message is displayed, stating that the support request has been assigned. An email with a link to the item is also automatically sent to the Assigned To person.
5. Click the link to close the Actions Status Window. All of the views are automatically updated with the new assignment information.

3. Resolve the Support Request

Once a support request has been assigned to a Support Engineer, they have several actions available to them to manage the process of updating the request, communicating with the requestor, and eventually closing the request.

The Support Engineers tab provides several views of information. The main view provides a listing of Support Requests by Engineer, so support staff can easily see all of the requests assigned to them and the status of each. These actions are available at the top of the view:

- **Close Support Request** – Changes the status on the request to "Completed" and sets the % Complete value to "100," removing the request from the main view. When this action is executed, the support request will show up on the "My Completed Requests" and the "Completed Requests" views.
- **Modify Support Request Information** – Allows the Support Engineer to update any information on the support request. Any values that are left blank on the action entry form are not modified.
- **Send Custom Email Message** – Allows the Support Engineer to send an email message to the requestor. The Engineer can identify the recipient(s), subject, and body of the email message.

Additional Steps in the Help Desk Process

The previous sections covered the basic steps for the Help Desk process. However, the process can involve more details, when appropriate. A basic support request can be turned into a larger item by assigning sub-tasks. And once a request has been resolved, the solution can be published to a Knowledge Base (KB) either within the Help Desk or externally.

Assign Tasks to a Support Request

Incomplete support requests are included on the "Tasks Associated with Support Request" view. Tasks can be associated to a support request using the Create New Support Task action available from this view.

1. Access the **Tasks Associated with Support Request** view and locate the support request you want to work with.
2. Place a check mark to the left of the request and select the **Create New Support Task action**. An action entry form is displayed.
3. Enter the following information:

Prompt	Description
Title	The title of the task to be associated with the support request.
Priority	The priority of this task. Standard values are High, Normal, and Low, but can be changed.
Status	The status of the task associated with the support request.
Description	A brief description of the task.
Due Date	The date on which the task is due. See Chapter 4 of the Capabilities Guide for details on using the entry fields below this prompt.
Assigned To	The Support Engineer or other individual to whom the task is assigned.
Support Title Reference	The title of the support request to which this task should be associated. This value must match the title of the request for the task to show up properly in this display, under the associated request.

4. Click **Go** when you are finished. The task is now associated with the selected support request.

As an alternative, you can use the **Create New Support Task from Existing Support Task** action. This creates a new task by copying the selected task. The user only enters the values that need to be different between the tasks; the rest of the values are copied from the source task.

Publish a Request Solution to a Knowledge Base

Once a support request has been completed, it can be published to a Knowledge Base if the Help Desk Coordinator feels that it would be a useful reference. To do this:

1. Access the **Completed Support Requests** view under the Help Desk Coordinator tab.
2. Place a mark next to the item(s) you want to publish and select the **Request Support Item to be Published in KB** action.
3. Click **Go**. The item is copied to the Knowledge Base/KB Approval view for the appropriate person to review and approve.
4. When the item is approved and ready for publishing, place a check mark to the left of the selected item in the Knowledge Base/KB Approval view and then select the **Publish to Knowledge Base** action. Click **Go**. The item is placed on the Knowledge Base tab.