



SP Marketplace SP IT Portal How-It-Works

Module Version 11.0



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Introduction

The SP IT Portal How-It-Works document reviews the application's functions from a business process perspective.

Portal Overview

The SP IT Portal by SP Marketplace is a next generation IT support solution that integrates process automation, staff collaboration and an employee self-service portal. It is a SharePoint site that provides two role-based portals, an IT Staff Portal where the IT team operates and an IT Employee Portal where IT customers (employees) can submit cases, access a knowledgebase and easily find resources that the IT group wishes to present to them. The goal of SP IT Portal is to drive self-service for employees, and improve productivity and collaboration of the IT staff.

Core to the application is providing IT services and support utilizing a Help Desk, and tracking IT assets. Additionally, it provides features to enhance IT staff communication and collaboration.

Key elements of the application:

- Process oriented features
 - A Help Desk to track cases
 - Asset management to track and manage assets
 - Change management to track change requests and larger IT projects with approval system
- Collaboration features
 - Knowledgebase
 - Document Libraries (Staff and Employee)
 - Task tracking
 - Calendars (meetings and schedules)

Use of the application is done through the portals which is separated by roles. The application automatically routes the user to the appropriate portal based on whether they are part of the IT staff or an employee needing services or resources.

The IT Staff Portal is designed as a place where the IT staff can work operationally every day, easily accessing the functions and resources they need to efficiently do their job. The IT Staff Portal has the following functionality:

- Help Desk case tracking and management
- IT asset management
- IT change request tracking
- Knowledgebase
- Collaboration features
- Work tracking – tasks, My Workplace dashboard
- Document Management
- IT management reports and Dashboard

Additionally, an IT Employee Portal is included, which makes it easy for end users to submit tickets, and access a knowledgebase, documents and training links.

The IT Employee Portal functionality consists of:

- Case submission and status
- Knowledgebase
- Department announcements
- Department news and events
- Useful documents
- Useful links
- Access department staff via Live Support Contacts
- Submit feedback

The SP IT Portal is built on the Office 365 and SharePoint platform and leverages all the native Office 365 and SharePoint components and applications. The SP IT Portal therefore adapts to any future Microsoft 365 changes, and is also 100% customizable by SharePoint business power users. Add your exiting logo, graphics, live feeds from your favorite websites to have a Weather or Stock Ticker, Polls and more, or let our [SP Marketplace Customer Services](#) department customize your application and match your company brand for you. You may learn more information about our Managed Customer Services [here](#).

Main Portal Functions

Help Desk

The core function of the SP IT Portal is to provide case management utilizing a Help Desk, such that the IT department may provide IT services and support to all employees of a company.

Employees may use the IT Employee Portal to submit cases, access a knowledgebase and easily find resources that the IT group wishes to present to them. IT department staff can use the Staff Portal to manage the IT requests, communicate with those employees as well as communicate and collaborate with their IT team members.

When new cases are submitted, the IT department is automatically notified via email of the new requests. Likewise, the case submitter is notified as their cases progress through the case cycle.

Cases may have documents attached to them such as supporting documentation that would be helpful to resolve the case. Cases may also have tasks assigned to them.

Cases may be linked to a single asset that exists in the assets list, but they don't have to be. Cases may also be associated with other cases in the event that multiple cases were submitted for the same issue.

Asset Management

Supporting the Help Desk is an asset management feature for tracking and manage IT assets. Assets may be imported or manually entered in the IT Portal and updated accordingly for tracking purposes. Assets

may be associated with cases as well as change requests. They may have documents attached to them such as instructions manuals or how-to guides. Assets may also have tasks assigned to them.

Change Management

Supporting the Help Desk is a change management feature for tracking change requests and larger IT projects. Change requests may be created from a workorder, and therefore linked to the case, or created as stand-alone projects. Change requests may be associated with assets and may also have tasks assigned to them.

Change requests have a built-in approval process. If the Approver field is filled in, the Approver will get notified and they have the ability to approve or reject the change request.

When a new change request is created and assigned, the Assigned to receives a notification of the new change request.

Portal Design

The SP IT Portal is an operational portal that provides a template solution to enhance an organization's use of Microsoft Office 365 and SharePoint implementation. This template was designed with the objective of meeting the most common IT support departmental requirements of mid-range organizations with 50 – 2000 employees. This application won't meet every organizations full set of requirements out-of-the-box, rather it will accelerate the SharePoint deployment by delivering 80-95% of the functionality and allowing the organization to add the remaining 5-20%.

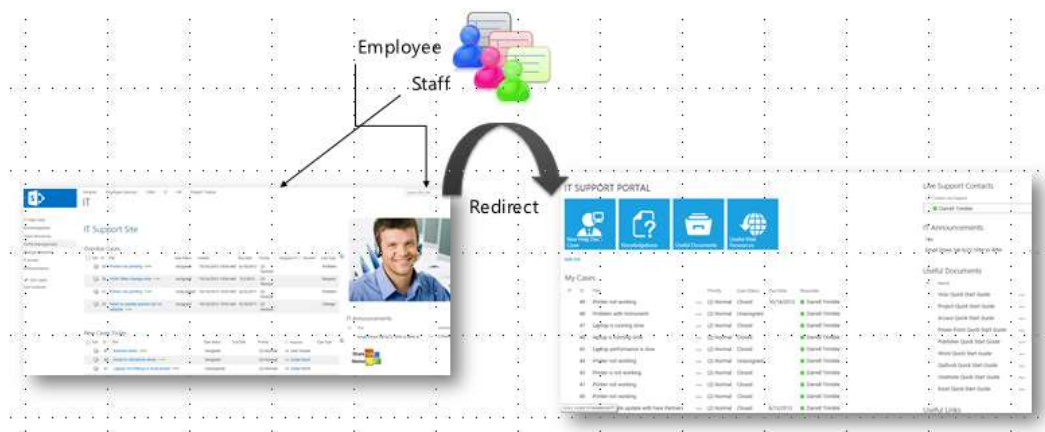
Role Based Portals

The SP IT Portal is designed with two audiences in mind, the IT department staff and all other employees (end users). The core processing of the SP IT Portal is to capture, track and manage IT Cases (or tickets) and automate case status communications with the employee. The core objects of management are IT Assets and their availability to IT customers (employees).

In support of these two audiences, the application provides for two role based portals. The Employee Portal allows employees to submit cases, review case status, and if possible, resolve the case/issue themselves through a knowledgebase, support materials, or by linking to resources like online tutorials. The IT Staff Portal allows IT department staff to manage cases, manage assets, collaborate with other IT staff, manage change requests, manage the knowledgebase, and control what documents and resources the employees can access in the Employee Portal.

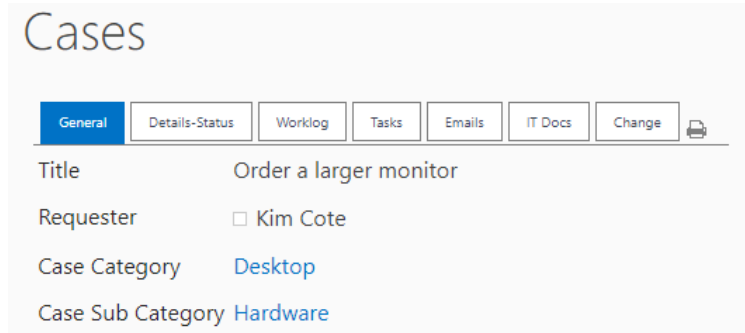
It is important to understand that based on what SharePoint Group a person belongs to, what is presented to the end user (Employee Portal page) versus the department staff (Department Staff Portal page) is different.

Access to the portals is controlled by a page re-direct type of feature. When a user links to the Site URL, this feature determines whether the use is part of the IT Staff group, and if yes, presents the IT Staff Home page. If the user is not part of the IT Staff permission group, then it routes the to the Employee Portal Page. In the Employee Portal, the employee can only see their cases by filtering on who created the case.



Enhanced Forms and Super Views.

A key component of all the SP Marketplace application templates is to utilize enhanced forms which allow the users to see everything related to the case all in one place, sometimes referred to as Super Views.



The screenshot displays a web interface for a 'Cases' application. At the top, the word 'Cases' is written in a large, light blue font. Below it is a horizontal navigation bar with several tabs: 'General' (highlighted in blue), 'Details-Status', 'Worklog', 'Tasks', 'Emails', 'IT Docs', and 'Change'. To the right of the 'Change' tab is a small printer icon. Below the navigation bar, the following information is displayed:

Title	Order a larger monitor
Requester	<input type="checkbox"/> Kim Cote
Case Category	Desktop
Case Sub Category	Hardware

The template was designed with the features that were found to be most appropriate for SMEs, and is driven by best practice assumptions which include:

- Providing rules based forms which present a limited set of information to end users (the General Tab only) and show more information for IT staff
- Presenting category information at a level that provides for reporting but does not confuse the end user with complexity
- Creating notifications that are informative, but not overdone (see workflows section)
- Keeping case work log information confidential from end users
- Using in-ticket correspondence with end-users, rather than attaching a multitude of emails. This reduces storage requirements and enables search features when managing cases
- Providing cross-list access to relevant lists and libraries, thus eliminating the need to leave the Case record in order to access additional information needed to resolve the issue
- Allowing the ability to create knowledgebase articles from a case

Related Resources

- *SP IT Portal – Quick Reference V11*

Roles and Security

An important factor for a successful implementation is to appoint an SP Marketplace Application Administrator (SPMP Administrator) responsible for the application who will focus on learning the SharePoint platform and the SP IT Portal. This person does not have to be a skilled IT technician, rather a tech savvy business user will suffice. The level of knowledge is that of a SharePoint business power user. We have a curriculum available on our site that can train you in a matter of hours - go to <http://www.spmarketplace.com/training-services.html> .

After over 1200 implementations we have found this to be the single defining factor between success and failure. SharePoint is not like a database, nor a software program. It is different kind of platform, so learning the basic functionality of this platform will provide a tremendous amount of value. The upside of learning this basic knowledge, will be a smooth implementation and the ability to make desired customizations.

This basic SharePoint knowledge will also help the SPMP Administrator understand what SharePoint customizations are possible, or not. Like any platform, it has its limitations. Even though SharePoint runs on the web, it is not your typical HTML site.

Governance is more than just having a responsible SPMP Administrator. Governance also includes managing access through groups and retention policies on different data and documents.

Permissions

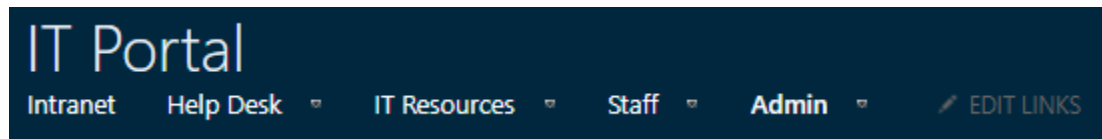
The general structure of access for these sites and the default Quick Start permissions at setup is as follows:

Role	Description	Permission Level
Administrator	Your company's SPMP Administrator	Full control of the SharePoint system
Staff	IT staff who manage Help Desk cases submitted by end users	Access to the Employee and Staff Portals Edit cases and manage the presentation of information on the IT Portal pages
Employees (End Users)	The people who need to submit a case	Access to the Employee Portal Create, and edit only their own cases

Navigation

Top Level Navigation

The navigation may be customized as desired. Out-of-the-box functionality provides this top-level Navigation.



The Top Navigation Bar is home to most of the functions in the SP IT Portal. The SPMP Administrator is free to change this navigation by adding or deleting menu items using standard SharePoint Navigation in the Site Settings function. Controlling what navigation items show for which users is controlled by the Audience feature in the Navigation item.

IT Employee Portal Top Navigation

- **Intranet** – access the Intranet

IT Staff Portal Top Navigation

- **Help Desk Menu**
 - **New Case** – create a new case
 - **All Cases** - access to all cases for Help Desk
 - **Unassigned Cases** – access all unassigned cases
 - **My Cases** – access to cases assigned to me
- **IT Resources Menu**
 - **My Workspace** - access all my cases, tasks, and documents
 - **Portal Content** – manage content that appears in Employee or Staff Portals
 - **Assets** – manage assets
 - **Change Requests** – manage change requests
 - **Knowledgebase** – manage Knowledgebase articles
 - **Contacts** –manage external contacts such as vendors
- **Staff Menu**
 - **Tasks** – manage IT staff related tasks
 - **Documents** – manage IT staff related documents
 - **Calendar** - manage the IT staff related events
 - **Links** – manage the IT staff related links

The Administrator menu item is only available to the SP Administrator and includes template setup, license management and a link to the SP Marketplace Customer Portal.

IT Portal Promoted Links

In addition to the top navigation, there are Promoted Links and Group Links sections that contains tiles with quick access links. The Group Links section will only appear for customers using SharePoint Online.

IT Employee Portal Promoted Links (Dashboard)

- **IT Case** – create a new case
- **Knowledgebase** – search the Knowledgebase
- **Useful Docs** – documents presented by department
- **Feedback** – submit feedback to department staff

IT Staff Portal Promoted Links (Dashboard)

- **Dashboard: Promoted Links (Tiles)**
 - **New Case** – create a new case
 - **Cases** – access to all cases for Help Desk; can also see “My Cases”
 - **Assets** – access to all IT assets
 - **Change Requests** – manage change requests
 - **Knowledgebase** - manage Knowledgebase
 - **Reports** – access to Help Desk reports
 - **Dashboard** – access to Power BI (not out-of-box)
 - **Employee Portal** – open the Employee Portal
- **Dashboard: Office 365 Group Links (Tiles)**
 - **Group** – quick link to Office 365 internal Groups
 - **Calendar** – quick link to Office 365 company Calendar
 - **OneDrive** – quick link to Office 365 company OneDrive
 - **Conversations** – quick link to Office 365 company conversations
 - **Delve Board** – quick link to Office 365 Delve board to see real-time company activity
 - **Planner** – quick link to Office 365 company Planner
 - **Yammer** – quick link to Office 365 company social boards
 - **Teams** - quick link to Office 365 company Teams group chats

Portal Content Management Page

IT Staff members have access to manage the content appearing on both the IT Staff Portal and the IT Employee Portal. All portal content can be managed by selecting Portal Content from the IT Resources menu.

Staff Portal Content Management

Staff Announcements: Manage staff announcements that appear on Staff Portal Home page.

Dept News: Manage the department news which appears on both Staff and Employee Portals. The Active Content feature allows you to check the **Publish to Portal** checkbox to push news to the company Intranet. News will need to be approved by the Content Manager before published.

Employee Portal Content Management

Dept Announcements: Manage department announcements that appear on the Employee Portal page. The Active Content feature allows you to check the **Publish to Portal** checkbox to push announcements to the company Intranet. Announcements will need to be approved by the Content Manager before published.

Dept News: Manage the department news which appears on both Staff and Employee Portals. The Active Content feature allows you to check the **Publish to Portal** checkbox to push news to the company Intranet. News will need to be approved by the Content Manager before published.

Dept Events Calendar: Manage department events that appear on the Employee Portal page. The Active Content feature allows you to check the **Publish to Portal** checkbox to push events to the company Intranet. Events will need to be approved by the Content Manager before published.

Useful Links: Manage Useful Links which are presented to Employees.

Useful Documents: Manage Useful Documents which are presented to Employees. Upload documents from a local computer or from the cloud.

Manage Feedback: Manage Employee Feedback results. Use the Actions menu item to setup personal alerts or to export the feedback data. Use the Settings menu item to manage or add new feedback questions. Use the two lower links to see the feedback.

Live Support Contacts: Add the staff members that should appear under Live Support Contacts on the Employee Portal. The list of available individuals to pick from is determined by the members of the Office 365 environment. The Live Support Contacts can be emailed or Skyped depending on your SharePoint setup.

Open Employee Portal: Open the Employee Portal.

Data Relationships

The SP IT Portal runs around two primary data lists being cases and assets, and one supporting data list being change requests.

Cases

Cases can be submitted by end users in the IT Employee Portal, by IT staff in the IT Staff Portal, or they can come in via email. Email submission setup is not an out-of-the-box feature, however can easily be configured by the SPMP Administrator (SharePoint On-premise requires an add-on product).

Once a case is created, it is assigned by an IT staff member and can be tracked in different views such as My Cases, Overdue Cases, Cases by Category, and more. Cases can be created for specific assets as well such as printers. After a case is completed, IT staff members can create a Knowledgebase article from the case for future reference by technicians and users alike.

The following diagram illustrates the data relationships for cases.



Assets

The SP IT Portal includes an integrated IT asset tracking and reporting system. The IT asset tracking system cross references to cases in the Help Desk and to change requests.

The following diagram illustrates the data relationships for IT Assets.



Change Requests

The SP IT Portal includes an integrated IT change request management system which cross references with cases, tasks and assets. Change requests can be initiated from a case or an asset, and include an optional approval process.

The following diagram illustrates the data relationships for IT Change Requests.



Other Components

Other application components of the SP IT Portal include:

- Knowledgebase
- Tasks
- Staff and portal documents
- Staff and portal announcements
- Staff and portal links
- Staff and portal calendar
- Department news viewable on both portals
- Live Support
- Feedback
- Reports
- Delve Discussion Board (if customer utilizing Microsoft Office Delve feature)

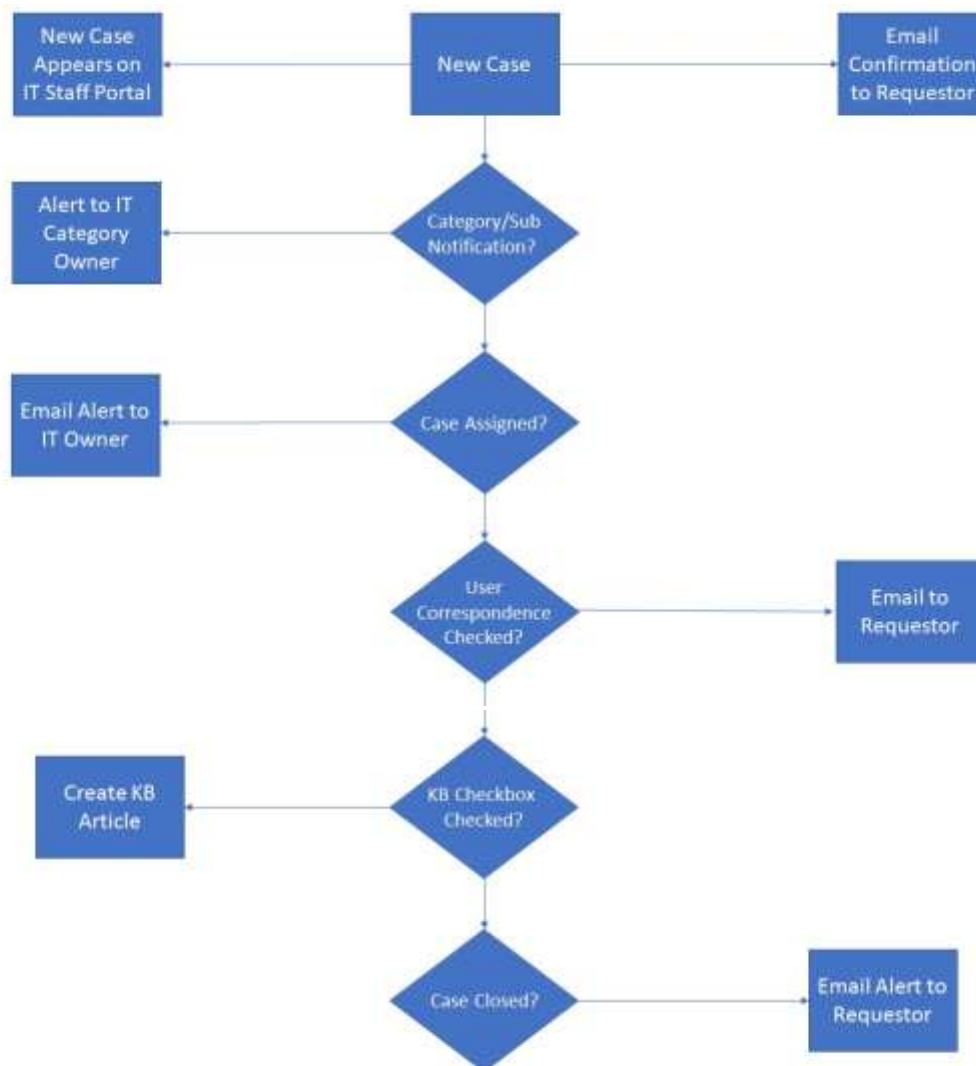
Processes

IT case management and change request management both include business automation which are executed by Infowise alerts and actions. The following diagrams detail the automated business processes that occur in the IT Portal application.

Cases

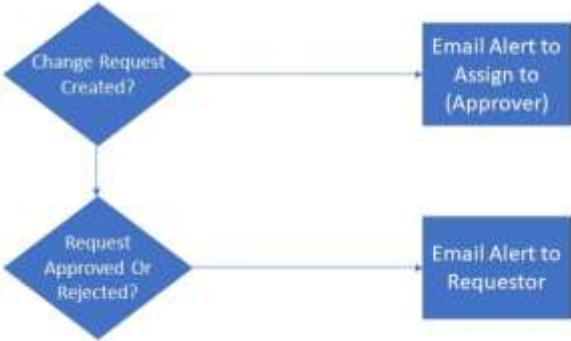
Infowise alerts and actions automate simple processes such as notifications to customers and technicians when a case is assigned. Workflows automatically create Knowledgebase Articles when created at the case level.

The following flowchart illustrates the actions and alerts that occur in the SP IT Portal around case management.



Change Requests

The following flowchart illustrates the actions and alerts that occur in the SP IT Portal around change request management.



Appendix

Document Change Log

Date	Description