

Introduction

The SP IT Portal application 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 application 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).

IT Staff Portal – Dept Staff User

Case Management

A. Create New Case

1. Click the **New Case** tile
2. Enter a **Title**
3. Select a **Category**
4. Select a **Subcategory**
5. Enter a detailed **Description**
6. Click the **Save** button

B. View Cases

1. Click **Cases** tile to see all cases in queue and sort as desired
2. Click **My Cases** to see your assigned cases
3. Click **Unassigned Cases** to see all unassigned cases
4. Click the ellipses (...) to see additional case views

C. Assign, Close or Edit Case

1. Click **Cases** tile to see all cases in queue and sort as desired
2. Open desired case by clicking on the **Edit** icon
3. Click **D: Detailed-Status** tab to assign case
4. Click **D: Detailed-Status** tab to close case:
 - 3. Resolved** means IT Staff has completed their work to solve issue and is awaiting employee confirmation of resolution;
 - 4. Closed** means all work is completed and issue is confirmed to be resolved



A: Create New Case

B: View Cases

C: Edit Case

D: Detailed-Status tab

Additional Case Information

- **D: Detailed-Status** tab - to edit case details including related cases or assets, and to create a Knowledgebase article
- **E: User Correspondence** tab - to send messages to the case Requestor
- **F: Worklog** tab - to document work completed
- **G: Tasks** tab – to create case related tasks for other employees, company-wide
- **H: IT Docs** tab – to attach case related documents
- **I: Change** tab – to create case related change requests



J: Manage Knowledgebase Articles

- Select **Knowledgebase** from the IT Resources menu to open the Knowledgebase list
- Navigate to desired article, click the **Edit** icon to edit article



Other IT Portal Functions

K. IT Resources Menu

- Access **My Workspace**
- Manage **Portal Content**
- Create and Manage **Assets**
- Create and Manage **Change Requests**
- Manage IT **Contacts**

L. Staff Menu

- Access and Manage staff **Tasks**
- Access and Manage staff **Documents**
- Access and Manage staff **Calendar**
- Access and Manage staff **Links**

- D:** Details-Status tab
- E:** User Correspondence tab
- F:** Worklog tab
- G:** Tasks tab
- H:** IT Docs tab
- I:** Change tab
- J:** Manage Knowledgebase Articles
- K:** IT Resources menu
- L:** Staff menu