

Provide the right support

Provide the right support



You can create many code-free solutions with SharePoint.

The screenshot shows a SharePoint 'Home' page for an 'IT Help' site. The page includes a navigation menu on the left with items like 'Home', 'Communities', 'Departments', 'Employee', 'Facilities', 'News', 'Resources', and 'Search'. The main content area is titled 'Welcome to IT Web!' and contains three sections: 'IT Help - My Assigned Issues', 'IT Help - To Be Assigned', and 'IT Help - Active Issues'. Each section contains a table of issues with columns for Issue ID, Title, Issue Status, Priority, and Due Date. A user profile picture is visible in the top right corner of the page.

Key Tasks

- Submit a Help Desk Ticket
- Help Desk Survey
- Start a hardware request
- Start a service request
- New hardware fulfillment request
- Install software
- Find Global Helpdesk phone numbers
- Get help with common work tasks
- Send and receive faxes
- Global Sales Report
- Switch to Mobile View
- + Add new link

Let's see how this process works, using help desk tickets as an example.

Issue a help desk request



Use a custom list to capture requests.

Office 365

BROWSE EDIT

Save Cancel Paste Copy Attach File Spelling

Commit Clipboard Actions Spelling

About this wiki
Information Technology
IT Contacts
IT Digital Assets
IT Help
Hardware Components
Key Tasks
Requests
Site Contents

Title * Please reset my password

Assigned To Enter a name or email address...

Issue status Submitted

Priority (1) High

Description
I forgot my password, please reset it.

Category (1) Laptop

Related Issues
additional RAM for m
Alerts not working or
can't connect with wi
Computer running ex
Do we have a license
email issues
Error: Maximum num

Comments

Due Date 12 AM 00

Days to Resolve

Date Resolved

Save Cancel

You can customize these requests with a title, priority, and description before submitting it with the Save button.

Make IT support easier



IT users can log into the IT site, and quickly see the state of current tickets to be assigned.

Office 365 Outlook Calendar People Yammer

David Longmuir

Home Communities Departments Employee Facilities News Resources Search

Welcome to IT Web!

Welcome to the IT Web home. Please visit this site for information on PC issues, network issues, to contact an IT professional, or to create an IT Help ticket. Check the calendar for upcoming maintenance and other software, hardware or networking updates.

IT Help - My Assigned Issues

Issue ID	Title	IssueStatus	Priority	Due Date
2	VPN issues	Resolved	(1) High	8/12/2013 12:00 PM
4	can't connect with wifi	Active	(2) Normal	8/12/2013 12:00 PM
5	Error: Maximum number of registrations has been reached	Resolved	(2) Normal	8/12/2013 1:00 PM
6	my desktop computer is running extremely slow	Resolved	(2) Normal	8/12/2013 12:00 PM
13	Do we have a license for Photoshop CS5?	Submitted	(2) Normal	

IT Help - To Be Assigned

Issue ID	Title	Assigned To	IssueStatus	Created By	Priority	Created
13	Do we have a license for Photoshop CS5?	David Longmuir	Submitted	Alex Darrow	(2) Normal	August 23
25	Please reset my password		Submitted	Garth Fort	(1) High	18 minutes ago
12	upgrade memory on laptop	Allie Bellew	(2) Normal			
15	need new toner cartridge in laser printer	Garret Vargas	(2) Normal			
19	additional RAM for my laptop	Allie Bellew	(1) High			
21	Problems installing the CRM application	Allie Bellew	(1) High			
23	laptop does not boot	Allie Bellew	(1) High			

The request appears under the IT Help – To Be Assigned header. Notice the Assigned To field is still empty.

Assign a help desk request



In this example, assigning the ticket is a simple process—just click the request and edit the appropriate fields.

The screenshot shows the 'Edit Item' form for a help desk request. The form is titled '365' and has an 'EDIT' tab. The 'Assigned To' field is highlighted with a red circle and contains the name 'Allie Bellew x'. The 'IssueStatus' dropdown is also highlighted with a red circle and is set to 'Active'. The 'Title' field contains 'Please reset my password'. The 'Description' field contains 'I forgot my password, please reset it.' The 'Category' dropdown is set to '(1) Laptop'. The 'Related Issues' section shows a list of related issues, including 'additional RAM for m', 'Alerts not working or can't connect with wi', 'Computer running ex', 'Do we have a license', 'email issues', and 'Error: Maximum num'. The 'Comments' section is empty. The 'Due Date' field is set to '12 AM' and '00'. The 'Days to Resolve' field is empty.

Reset a password



A workflow associated with the help desk request automatically sends a notification.



The screenshot shows an Outlook inbox with a notification email from IT Web. The email subject is "Workflow Tasks - Review Help Desk Ticket - Please... has been assigned to you". The sender is IT Web <no-reply@sharepointonline.com> and it was received on Tue 10/22/2013 3:15 PM. The email body contains the following text:

Action Items + Get more apps

Task assigned by Garth Fort on 10/22/2013.

A review task has been created for the following list item.
I forgot my password, please reset it.
<https://spusecasedemotest4.sharepoint.com/sites/contoso/Employee/ITWeb/Lists/IT%20Help/DispForm.aspx?ID=25>

To complete this task:

1. Review [Please reset my password.](#)
2. Perform the specific activities required for this task.
3. [Open this task](#) to mark the task as completed.

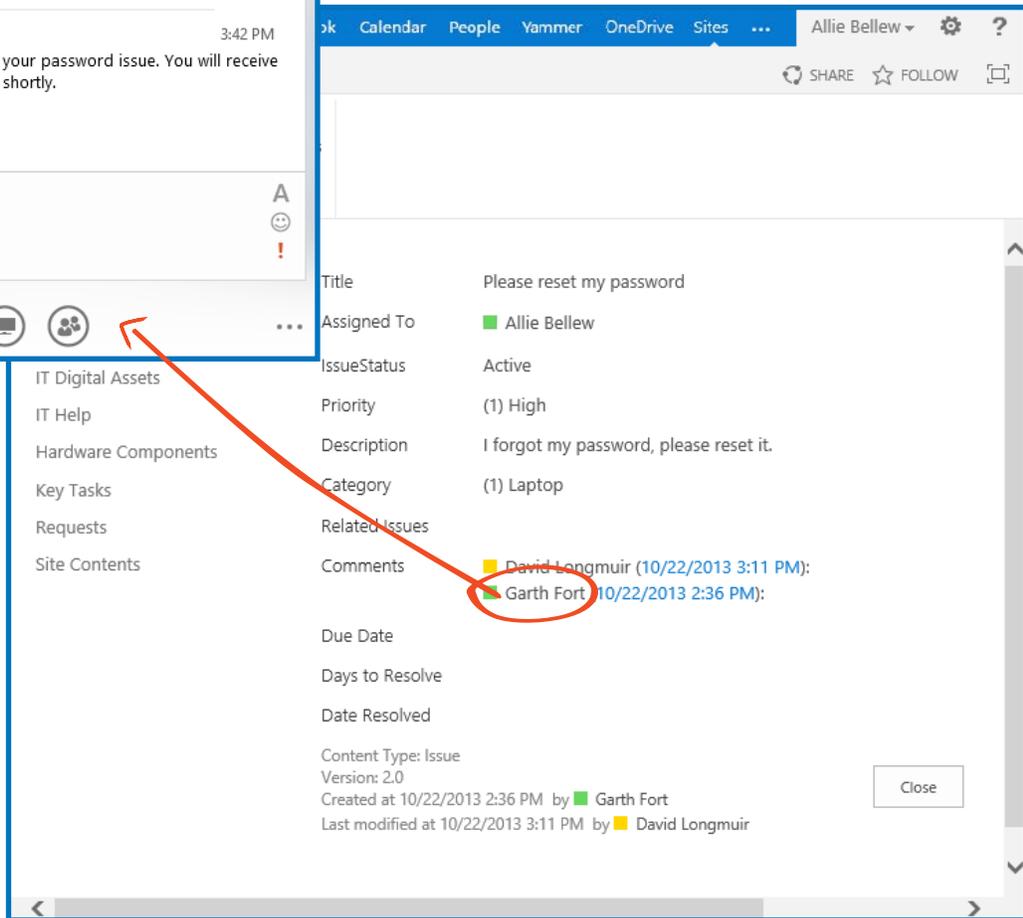
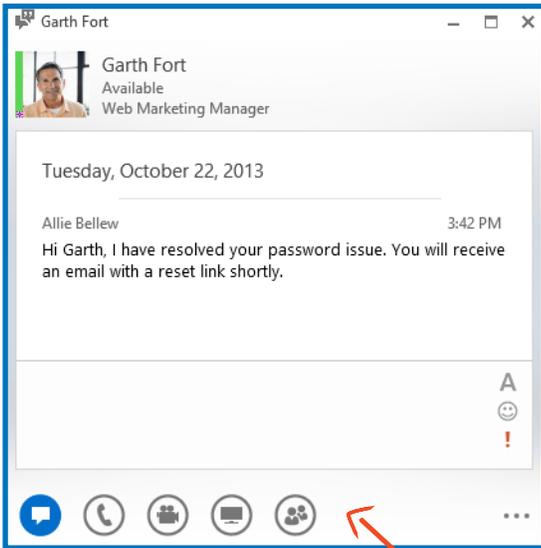
Assignees can access the ticket by simply clicking the link in the notification.

Communicate easily through Lync



Lync integration also facilitates communication about tickets.

Simply click the green Lync presence indicator to open the instant message window.



Resolve issues quickly



After resolving the issue, just update the relevant fields in the ticket.

The screenshot shows the 'Edit Item' form for a ticket in a SharePoint environment. The form is titled 'Issue' and has the following fields:

- Content Type:** Issue (Track an issue or problem.)
- Title:** Please reset my password
- Assigned To:** Allie Bellew x
- IssueStatus:** Resolved (highlighted with a red circle)
- Priority:** (1) High
- Description:** I forgot my password, please reset it.
- Category:** (1) Laptop
- Related Issues:** additional RAM for m... Alerts not working or can't connect with wi... Computer running ex... Do we have a license email issues (highlighted with a red circle)
- Comments:** Resolved per IT Department procedures. Reset link sent via email. (highlighted with a red circle)

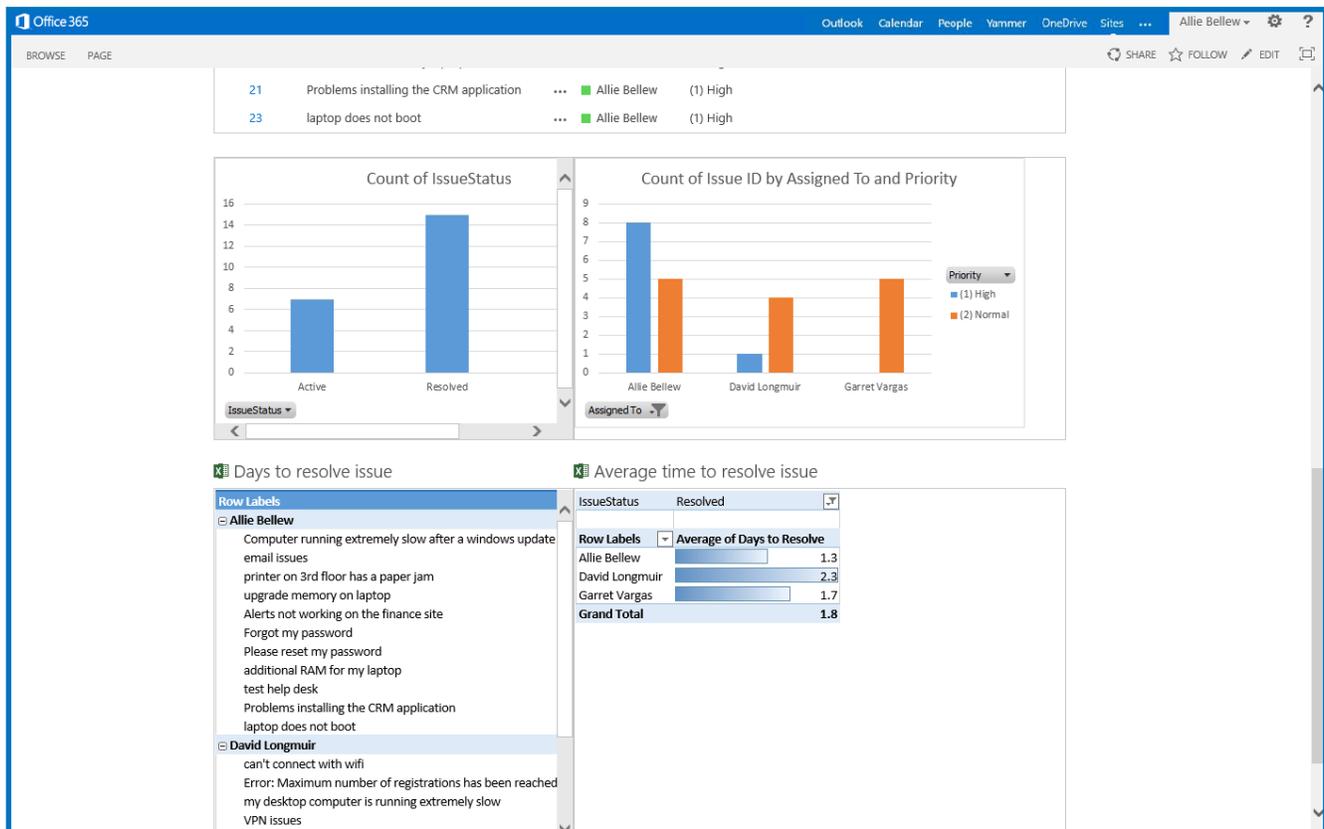
The comments section also shows a list of users and their timestamps:

- David Longneir (10/22/2013 3:11 PM):
- Garth Fort (10/22/2013 2:36 PM):

Build dashboards with Excel



You can also create dashboards that visually display data through Excel, and integrate them directly in SharePoint sites.



Export data to Excel



To generate a dashboard, export data from SharePoint to Excel.

The screenshot shows a SharePoint site with a navigation menu on the left. The 'IT Help' menu item is circled in red. The main content area displays a table of assigned issues.

Issue ID	Title	IssueStatus	Priority	Due Date
3	printer on 3rd floor has a paper jam	Resolved	(2) Normal	8/12/2013 1:00 PM
9	email issues	Resolved	(1) High	
11	Computer running extremely slow after a windows update	Resolved	(1) High	
12	upgrade memory on laptop	Active	(2) Normal	
14	Alerts not working on the finance site	Resolved	(2) Normal	9/10/2013 12:00 AM
17	Forgot my password	Resolved	(2) Normal	
19	additional RAM for my laptop	Active	(1) High	
20	test help desk	Resolved	(2) Normal	
21	Problems installing the CRM application	Active	(1) High	
22	Please reset my password	Resolved	(1) High	
23	laptop does not boot	Active	(1) High	

First, navigate to a list that is currently storing data.

Export list data to Excel



After navigating to the desired list, simply select Export to Excel.

The screenshot shows a SharePoint list view for 'IT Help' with 11 items. The 'Export to Excel' button is highlighted in the top ribbon. The list contains the following data:

Issue ID	Title	Assigned To	Issue Status	Days to Resolve	Priority	Created By	Created	Date Resolved
1	remove virus from laptop	Garret Vargas	Resolved	1	(2) Normal	David Longmuir	August 12	8/13/2013
2	VPN issues	David Longmuir	Resolved	2	(1) High	Garth Fort	August 12	8/14/2013
3	printer on 3rd floor has a paper jam	Allie Bellew	Resolved	2	(2) Normal	Katie Jordan	August 12	
4	can't connect with wifi	David Longmuir	Active	0	(2) Normal	Katie Jordan	August 12	
5	Error: Maximum number of registrations has been reached	David Longmuir	Resolved	1	(2) Normal	Alex Darrow	August 12	8/13/2013
6	my desktop computer is running extremely slow	David Longmuir	Resolved	4	(2) Normal	Alex Darrow	August 12	8/16/2013
7	issue one	Garret Vargas	Resolved	3	(2) Normal	David Longmuir	August 13	
8	problems with web audio session	Garret Vargas	Resolved	1	(2) Normal	Garth Fort	August 20	8/20/2013
9	email issues	Allie Bellew	Resolved	1	(1) High	Dorena Paschke	August 21	
10	Password Reset	Garret Vargas	Resolved		(2) Normal	Katie Jordan	August 21	
11	Computer running extremely slow after a windows update	Allie Bellew	Resolved		(1) High	Alex Darrow	August 21	

Generate a chart in Excel



Excel has a Recommended Charts command to make the process easier.

The spreadsheet data is as follows:

Issue ID	Title	Assigned To	IssueStatus	Days to Resolve	Priority	Created By	Created	Date Res
1	remove virus from laptop	Garret Vargas	Resolved		1 (2) Normal	David Longmuir	8/12/2013 9:02	
2	VPN issues	David Longmuir	Resolved		2 (1) High	Garth Fort	8/12/2013 10:05	
3	printer on 3rd floor has a paper jam	Allie Bellew	Resolved		2 (2) Normal	Katie Jordan	8/12/2013 10:16	
4	can't connect with wifi	David Longmuir	Active		0 (2) Normal	Katie Jordan	8/12/2013 10:17	
5	Error: Maximum number of registrations has been reached	David Longmuir	Resolved		1 (2) Normal	Alex Darrow	8/12/2013 10:26	
6	my desktop computer is running extremely slow	David Longmuir	Resolved		4 (2) Normal	Alex Darrow	8/12/2013 10:34	
7	issue one	Garret Vargas	Resolved		3 (2) Normal	David Longmuir	8/13/2013 14:14	
8	problems with web audio session	Garret Vargas	Resolved		1 (2) Normal	Garth Fort	8/20/2013 11:54	
9					1 (1) High	Dorena Paschke	8/21/2013 15:39	
10					(2) Normal	Katie Jordan	8/21/2013 15:43	
11					(1) High	Alex Darrow	8/21/2013 15:54	
12					(2) Normal	Garth Fort	8/23/2013 15:31	
13					(2) Normal	Alex Darrow	8/23/2013 15:35	
14					(2) Normal	Alex Darrow	9/9/2013 13:15	
15					(2) Normal	Katie Jordan	9/9/2013 13:37	
16					1 (2) Normal	Garth Fort	9/18/2013 14:09	
17					(1) High	Alex Darrow	9/27/2013 9:42	
18					(2) Normal	Dorena Paschke	9/27/2013 11:23	
19					(1) High	Dorena Paschke	9/27/2013 11:40	
20					(1) High	Garth Fort	9/27/2013 15:15	
21					(1) High	Alex Darrow	9/30/2013 15:26	
22					(1) High	Garth Fort	10/1/2013 15:22	
23								
24								

The 'Recommended Charts' dialog box shows the following chart details:

- Chart Type: Clustered Column
- Chart Title: Count of Title by IssueStatus
- Chart Description: A clustered column chart is used to compare values across a few categories. Use it when the order of categories is not important.

Just select the data to be incorporated into the chart, click Recommended Charts, and choose which style best suits your needs.

Import a chart to SharePoint



Importing the chart to SharePoint is a simple process.

The image illustrates the process of saving an Excel chart to SharePoint. It consists of three main parts:

- Top Left:** A screenshot of the Excel 'Save As' dialog box. The 'Contoso' document library is selected, and it is circled in red. An arrow points from this library to the SharePoint 'Save As' dialog in the bottom left.
- Top Right:** A screenshot of the Excel spreadsheet showing a bar chart titled 'Count of Title by IssueStatus'. The chart data is as follows:

IssueStatus	Count of Title
Active	6
Resolved	16
Submitted	1
- Bottom Left:** A screenshot of the SharePoint 'Save As' dialog box. The file name is 'Book1' and the save type is 'Excel Workbook'. The 'IT Web Documents' library is selected.

After selecting Save As in Excel, pick a document library in SharePoint and give the Excel workbook a name. The chart is now ready to be placed in an Excel Web Access Web Part on a Web Part page.

Create a chart page



To display your new chart in SharePoint, first create a new page.

The screenshot shows a SharePoint site with a navigation menu on the left and a main content area. The 'Add a page' option is highlighted in the top right menu. The 'Add a page' dialog box is open, and the 'Add a page' option is highlighted in the top right menu. The dialog box contains a text input field with 'Chart' entered, a URL field with 'https://spusecasedemotest4.sharepoint.com/sites/contoso/Employee/ITWeb/pages/chart.aspx', and 'Create' and 'Cancel' buttons.

Issue ID	Title	IssueStatus	Priority	Due Date
2	VPN issues	Resolved	(1) High	8/12/2013 12:00 PM
4	can't connect with wifi	Active	(2) Normal	8/12/2013 12:00 PM
5	Error: Maximum number of registrations has been reached	Resolved	(2) Normal	8/12/2013 1:00 PM
6	my desktop computer is running extremely slow	Resolved	(2) Normal	8/12/2013 12:00 PM
13	Do we have a license for Photoshop CSS?	Submitted	(2) Normal	

Issue ID	Title	Assigned To	IssueStatus	Created By	Priority	Created
13	Do we have a license for Photoshop CSS?	David Longmuir	Submitted	Alex Darrow	(2) Normal	August 13

Insert an Excel Web Access Part



It only takes a few clicks to add an Excel Web Access Web Part to a new page.

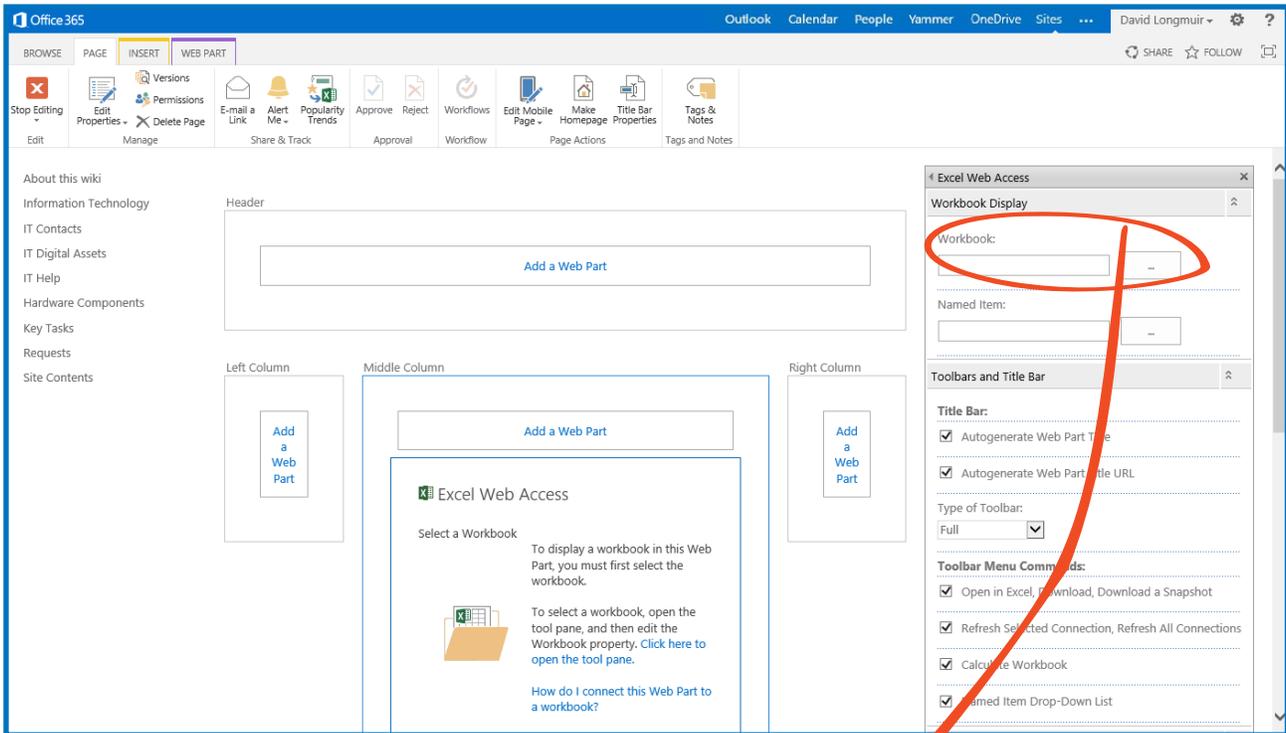
The screenshot shows the Office 365 interface with the following elements:

- Navigation Bar:** Outlook, Calendar, People, Yammer, OneDrive, Sites, and a user profile for David Longmuir.
- Command Bar:** Includes options like Stop Editing, Edit Properties, Delete Page, E-mail a Link, Alert Me, Popularity Trends, Approve, Reject, Workflows, Edit Mobile Page, Make Homepage, Title Bar Properties, and Tags & Notes.
- Categories Pane:** A list of categories including Apps, Blog, **Business Data** (highlighted with a red circle), Community, Content Rollup, Document Sets, Filters, and Forms.
- Parts Pane:** A list of web parts including Business Data Actions, Business Data Connectivity Filter, Business Data Item, Business Data Item Builder, Business Data List, Business Data Related List, **Excel Web Access** (highlighted with a red circle), Indicator Details, Status List, and Visio Web Access.
- About the part Panel:** Contains the title 'Excel Web Access', a description 'Use the Excel Web Access Web Part to interact with an Excel workbook as a Web page.', and a dropdown menu for 'Add part to: Middle Column'. The **Add** button is highlighted with a red circle.
- Page Content:** Shows a 'Header' section with a placeholder box containing the text 'Add a Web Part'.

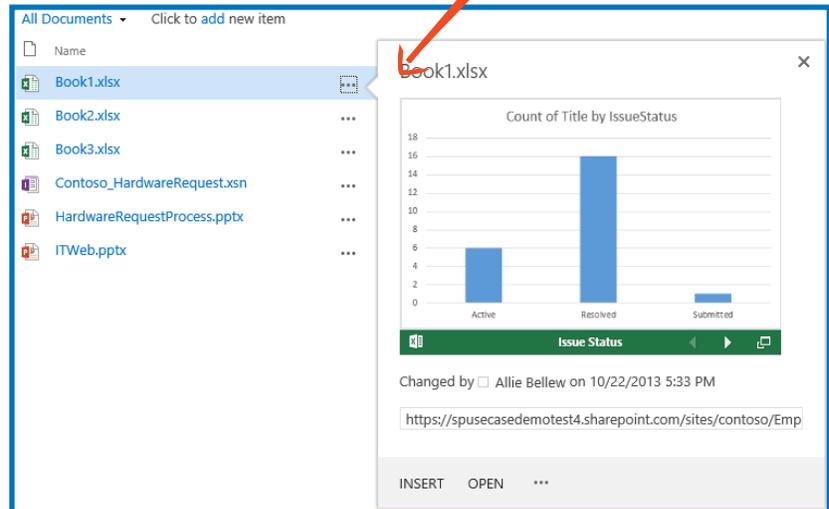
Import Excel data



To link your Excel Web Part to its data source, open the tool pane, and then navigate to the workbook by clicking the ellipsis next to the Workbook field.



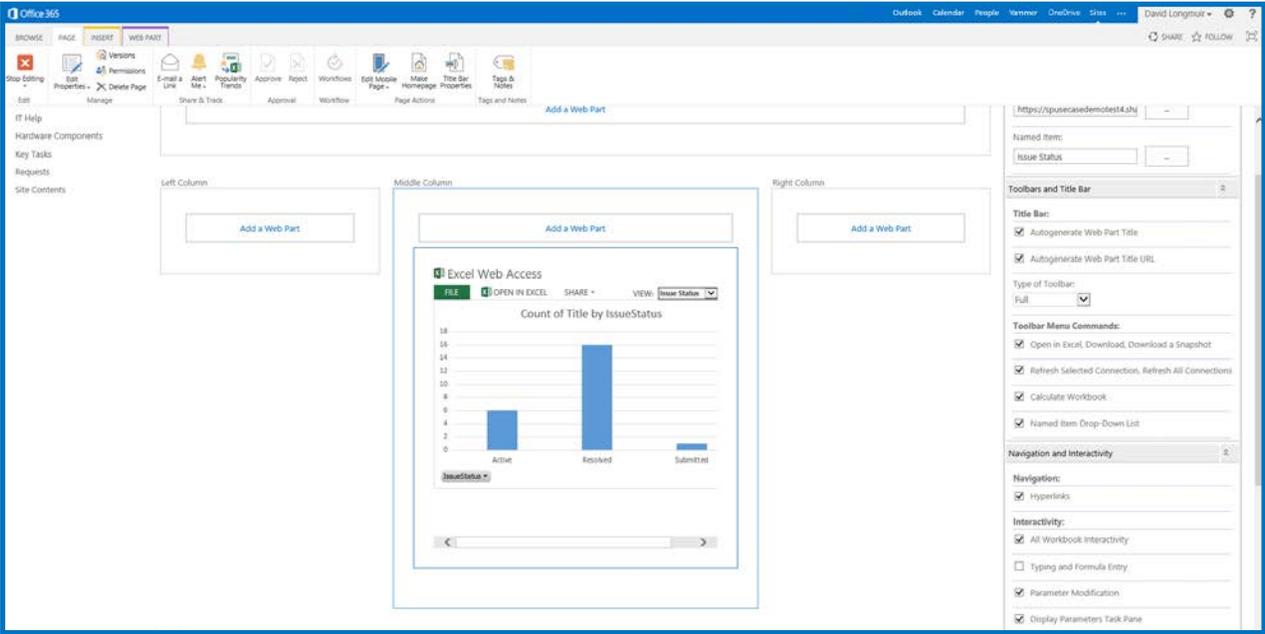
Select the Excel workbook which contains the data for your chart and insert it.



Use an Excel chart in SharePoint



Your chart is now integrated into your SharePoint site.



Create a satisfaction survey



SharePoint includes a Survey Template that allows users to supply questions and various options for responses.

The screenshot displays an Office 365 SharePoint site. The top navigation bar includes 'Outlook', 'Calendar', 'People', 'Yammer', 'OneDrive', and 'Sites'. The main content area shows a 'Home' page with a 'Welcome to IT Web!' message. A dropdown menu is open, highlighting 'Site settings'. Below this, the 'Site Contents' page is shown, featuring a grid of 'Lists, Libraries, and other Apps'. The 'Helpdesk Survey' list item is circled in red, showing it has 3 items and was modified 7 days ago.

In this example of a help desk survey, go to the Helpdesk Survey list from the IT Web home page.

Add new questions to a survey



Adding questions to a survey is a simple process.

Home Communities Departments Employee Facilities News Resources Search

Helpdesk Survey

Respond to this Survey Actions Settings

Survey Name:	Helpdesk S
Survey Description:	
Time Created:	8/13/2013
Number of Responses:	3

- Add Questions
Add an additional question to this survey.
- Survey Settings**
Manage questions and settings for this survey.

Show a graphical summary of responses
 Show all responses

Questions	
A question stores information about each item in the survey. The following questions are currently available in this survey:	
Question	Type of answer
Rate the overall quality of the service provided.	Choice
Rate the technical skills of the analyst	Choice
Rate the timeliness of the service provide	Choice
Rate the ability of the technician to solve your problem.	Choice
Rate the ease of submitting a ticket	Choice
Rate the Communication and Follow-up on problem resolution.	Choice
Modified	Date and Time
Created	Date and Time

- Add a question
- Change the order of the questions

Here you can see the existing questions on the survey, and add any additional questions.

Include a communication question



Let's add a question about Communication and Follow-up after problem resolution.

New Question ⓘ

Question and Type
Type your question and select the type of answer.

Question:
Rate the Communication and Follow-Up on problem resolution.

The type of answer to this question is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Rating Scale (a matrix of choices or a Likert scale)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Page Separator (inserts a page break into your survey)
- External Data
- Managed Metadata

Additional Question Settings
Specify detailed options for the type of answer you selected.

Require a response to this question:
 Yes No

Enforce unique values:
 Yes No

Type each choice on a separate line:

- Very Satisfied
- Satisfied
- Neutral
- Dissatisfied
- Very Dissatisfied

Display choices using:

- Drop-Down Menu
- Radio Buttons
- Checkboxes (allow multiple selections)

After entering the question in the appropriate field, you can add a set of responses to select from.

Examine survey responses



SharePoint survey responses can be shown in a graphical summary.

Home Communities Departments Employee Facilities News Resources Search

Helpdesk Survey

Respond to this Survey Actions Settings

Survey Name: Helpdesk Survey

Survey Description:

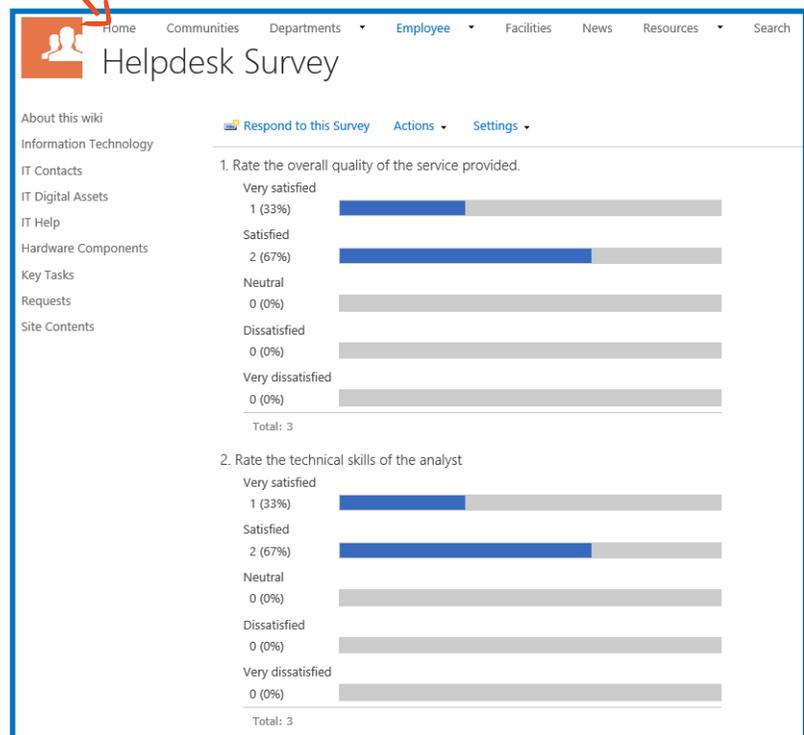
Time Created: 8/13/2013 2:41 PM

Number of Responses: 3

Show a graphical summary of responses

Show all responses

Simply click the Show a graphical summary of responses link, and the page displays the results.



Use Visio in SharePoint



Visio graphic services is another way to visually display data from SharePoint.

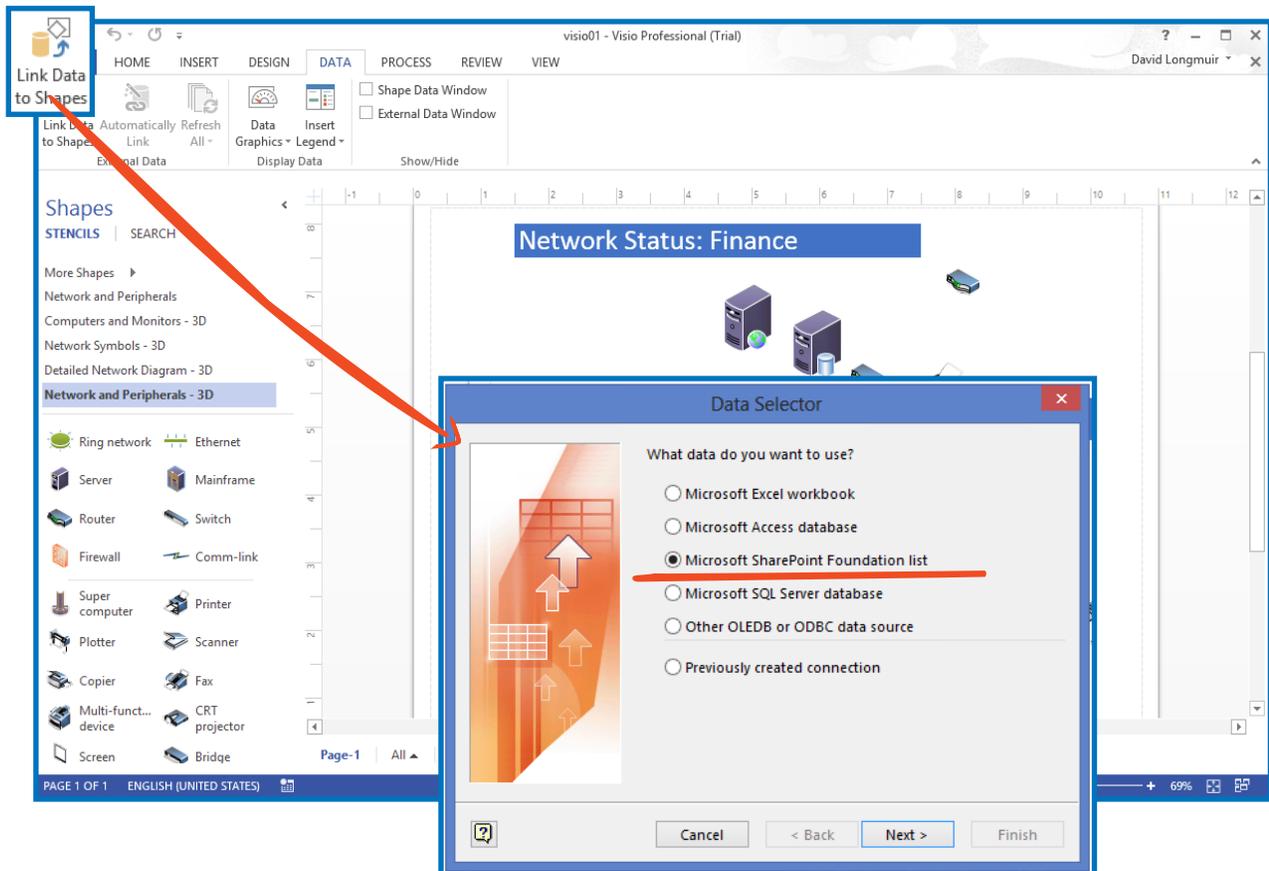
The screenshot displays an Office 365 SharePoint site interface. At the top, the navigation bar includes 'Office 365', 'Outlook', 'Calendar', 'People', 'Yammer', 'OneDrive', and 'Sites'. The user profile 'David Longmuir' is visible in the top right. Below the navigation bar, the site title is 'Finance Department Network Dashboard'. A left-hand navigation pane lists various site sections, with 'Finance' selected under 'Network Status Dashboards'. The main content area features a Visio diagram titled 'Network Status : Finance'. The diagram shows a network topology with a legend indicating 'Success' (green checkmark), 'Warning' (yellow triangle), and 'Error' (red X). The network is divided into 'BACK OFFICE' and 'HQ' sections. A 'Back to home' button is located at the bottom right of the diagram.

In many cases, key performance indicators (KPIs) improve the reaction time needed to support the environment and provide the ability to visually view the status of dynamically changing items.

Create a Visio diagram



Let's look at an existing diagram in Visio, one that's based upon the same diagram that exists in SharePoint.

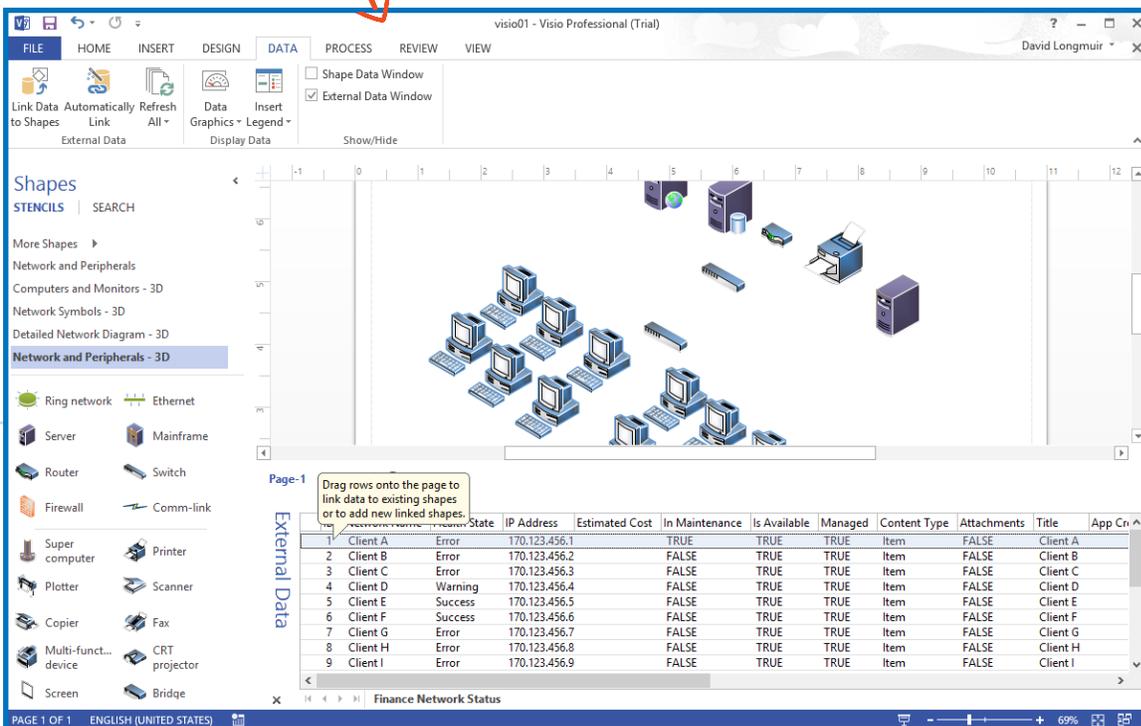
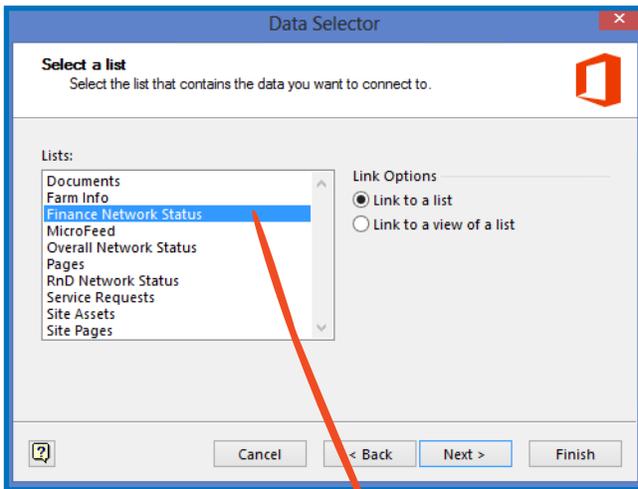


We can automatically link the Visio diagram to the data stored in SharePoint.

Import SharePoint list data



Let's look at the Finance Network Status diagram in Visio. It's based on the same diagram that exists in SharePoint.



Create data graphics



Now that we've linked all the objects in the diagram to the SharePoint list, let's create KPIs based on data columns.

The screenshot shows the Microsoft Visio interface. The 'Data Graphics' menu is open, with the 'Data Graphics' icon circled in red. The menu options are:

- No Data Graphic
- Available Data Graphics (with icons for various chart types)
- Create New Data Graphic...
- Edit Data Graphic...
- Apply after Linking Data to Shapes

The background shows a network diagram with various hardware icons. Below the diagram is a data table titled 'External Data' with the following columns and rows:

ID	Network Name	Health State	IP Address	Estimated Cost	In Maintenance	Is Available	Managed	Content Type	Attachments	Title	App Cr
1	Client A	Error	170.123.456.1		TRUE	TRUE	TRUE	Item	FALSE	Client A	
2	Client B	Error	170.123.456.2		FALSE	TRUE	TRUE	Item	FALSE	Client B	
3	Client C	Error	170.123.456.3		FALSE	TRUE	TRUE	Item	FALSE	Client C	
4	Client D	Warning	170.123.456.4		FALSE	TRUE	TRUE	Item	FALSE	Client D	
5	Client E	Success	170.123.456.5		FALSE	TRUE	TRUE	Item	FALSE	Client E	
6	Client F	Success	170.123.456.6		FALSE	TRUE	TRUE	Item	FALSE	Client F	
7	Client G	Error	170.123.456.7		FALSE	TRUE	TRUE	Item	FALSE	Client G	
8	Client H	Error	170.123.456.8		FALSE	TRUE	TRUE	Item	FALSE	Client H	
9	Client I	Error	170.123.456.9		FALSE	TRUE	TRUE	Item	FALSE	Client I	

Display KPIs



We can associate specific icons to be displayed based on the state of the hardware in the Finance network.

New Item

Display
Data field: Health State
Displayed as: Icon Set
Style: [Green Circle, Yellow Circle, Red Circle, Yellow Triangle, Red Diamond]

Position
 Use default position
Horizontal: Right
Vertical: Top

Rules for showing each icon

Green Circle	Health State	equals	Success
Yellow Circle	Health State	equals	Warning
Red Circle	Health State	equals	Error
Yellow Triangle	Health State	equals	
Red Diamond	Health State	equals	

OK Cancel

As you can see, all the network hardware is automatically updated with the appropriate icon based on the list data.

visio02 - Visio Professional (Trial)

FILE HOME INSERT DESIGN DATA PROCESS REVIEW VIEW

Link Data to Shapes | Automatically Link | Refresh All | External Data | Data Graphics | Insert Legend | Display Data | Show/Hide

Shapes
STENCILS | SEARCH

More Shapes >
Network and Peripherals
Computers and Monitors - 3D
Network Symbols - 3D
Detailed Network Diagram - 3D
Network and Peripherals - 3D

Ring network | Ethernet
Server | Mainframe
Router | Switch
Firewall | Comm-link
Super computer | Printer
Plotter | Scanner
Copier | Fax
Multi-funct... device | CRT projector
Screen | Bridge

External Data

ID	Network Name	Health State	IP Address	Estimated Cost	In Maintenance	Is Available	Managed	Content Type	Attachments	Title	App Cr
1	Client A	Error	170.123.456.1		TRUE	TRUE	TRUE	Item	FALSE	Client A	
2	Client B	Error	170.123.456.2		FALSE	TRUE	TRUE	Item	FALSE	Client B	
3	Client C	Error	170.123.456.3		FALSE	TRUE	TRUE	Item	FALSE	Client C	
4	Client D	Warning	170.123.456.4		FALSE	TRUE	TRUE	Item	FALSE	Client D	
5	Client E	Success	170.123.456.5		FALSE	TRUE	TRUE	Item	FALSE	Client E	
6	Client F	Success	170.123.456.6		FALSE	TRUE	TRUE	Item	FALSE	Client F	
7	Client G	Error	170.123.456.7		FALSE	TRUE	TRUE	Item	FALSE	Client G	
8	Client H	Error	170.123.456.8		FALSE	TRUE	TRUE	Item	FALSE	Client H	
9	Client I	Error	170.123.456.9		FALSE	TRUE	TRUE	Item	FALSE	Client I	

Page-1 | All | +

Finance Network Status

PAGE 1 OF 1 | WIDTH: 0.7 IN. | HEIGHT: 1 IN. | ANGLE: 0° | ENGLISH (UNITED STATES) | 69%



Office 365 for Business Learning Center
<http://aka.ms/o365learning>