

Help Central: Using SharePoint as a Help Desk & Knowledge Base Portal

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SharePoint is an online collaborative environment, fully integrated with Microsoft programs, which allows employees to manage users, content, workflows, and business processes more efficiently and facilitates the sharing of information across the organization.

Before SharePoint LHL used a simple Web form for Web site changes and nothing but e-mail for any other issues.

Problems:

- No tracking of issues.
- Confusion over to whom to report issues.
- Information about solutions scattered among staff.

After SharePoint the systems department moved the simple Web form for reporting Web site issues to SharePoint and then slowly began adding other issues and people.

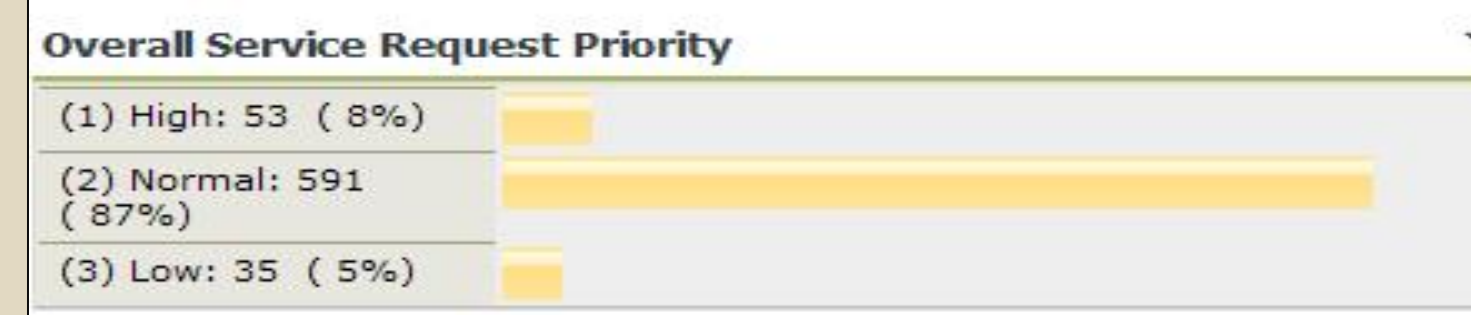
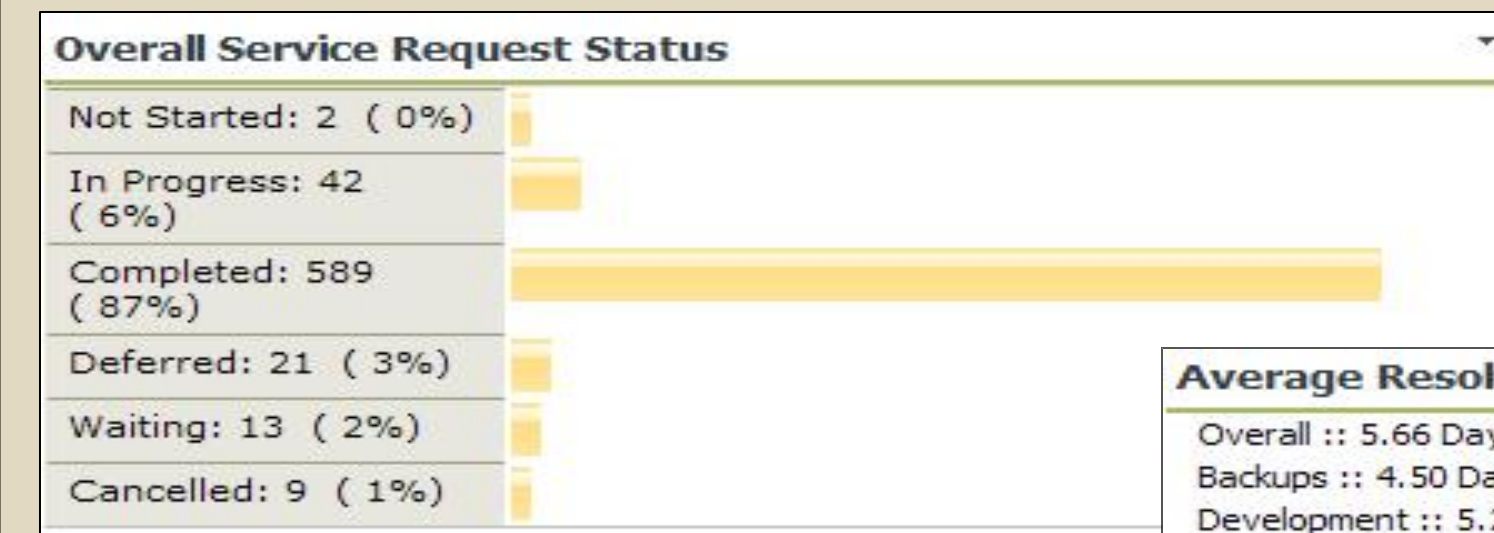
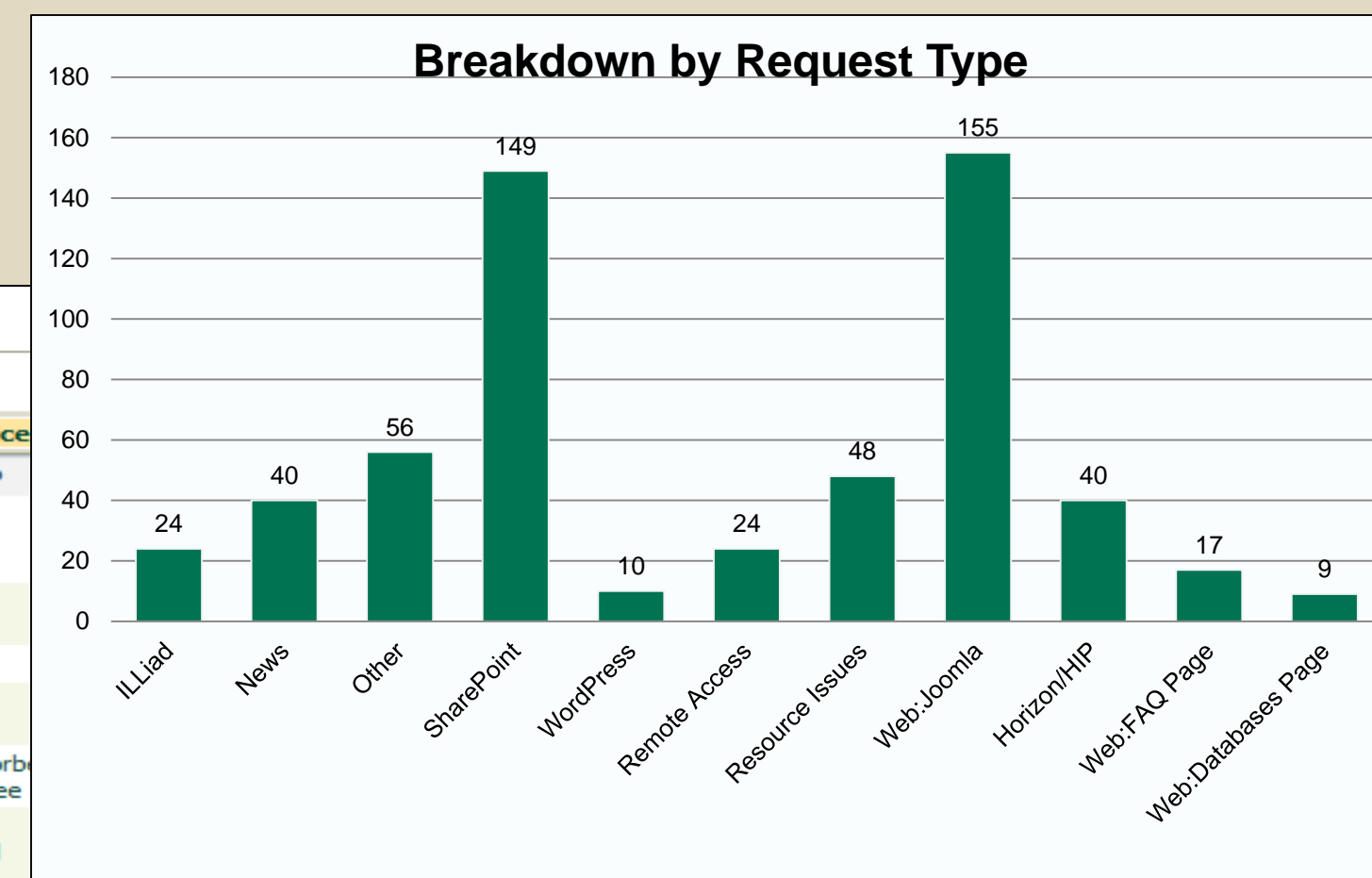
Benefits:

- SharePoint allows for a centralized way to track and report on issues and staff effort.
- Intelligent forms, bound to workflows, automatically identify the requestor, create assignments to the appropriate staff, and send email notifications during the process.
- Requests are added to or removed from knowledgebase by a single form field.
- Items are all searchable.
- Both the requestor and the person working on the request can enter new data and comments.
- Specialized dashboard pages provide requestors and assignees dynamic views for tracking issues.
- Reporting tools allow staff to easily monitor where library resources and staff time are being utilized.

New Problems:

- How to process requests which cross multiple types. For instance, is a nonfunctioning journal link in the catalog a Resource Issue or a Horizon/HIP issue?
- Complete staff participation. Some still report issues via emails or phone.
- Inadequate notification system. System should be more responsive to changes in important fields, triggering email alerts to all parties upon changes to these fields. Presently, it's up to all parties to manually set the SharePoint's *Alert Me* feature to enable advanced notification.

Subject	Task Status	Priority	Start Date	Due Date	Request Types	Assigned To
Help Troubleshooting Call Recording Software for Suzanne	Not Started	(2) Normal	9/23/2011		Other	Lisa A Ennis
Help Installing Security Camera software	Not Started	(2) Normal	9/23/2011		Other	Lisa A Ennis
SP leave form	Deferred	(3) Low	7/6/2010	7/20/2010	SharePoint	Randy S Tims
Service Request Improvements	Deferred	(2) Normal	8/12/2010	8/26/2010	SharePoint	Randy S Tims
HaPI - SFX - Article Linker difference	Waiting on someone else	(2) Normal	1/5/2011	1/19/2011	Resource Issues	Elizabeth R Lorb Sylvia McAphee
Remote Access issue - IE resolving to blank page	Waiting on someone else	(2) Normal	2/16/2011	3/2/2011	Remote Access (EZProxy)	Lisa A Ennis Nicole Mitchell
Mobile Chat Widget	Deferred	(2) Normal	3/24/2011	4/7/2011	Web:FAQ Page	Nicole Mitchell
Service Request Change	Deferred	(3) Low	6/14/2011	6/28/2011	Web:Joomla	Randy S Tims
Lister Hill News change	Deferred	(2) Normal	6/14/2011	6/28/2011	Web:Joomla	Randy S Tims
LibX	In Progress	(2) Normal	6/20/2011	7/4/2011	Other	Randy S Tims Lisa A Ennis



Service Requests: Illiad Billing Mgr Invoices will not merge

Subject: Illiad Billing Mgr Invoices will not merge

Task Status: Completed

Assigned To: Lisa A Ennis

Priority: (2) Normal

Start Date: 9/15/2011

Due Date: [Blank]

Date Completed: 9/15/2011

Request Types: ILLiad

Description: Error: Error has occurred The Microsoft Access database engine could not find object.....

Comments: See attached document for steps to fix this issue.

Keywords: [Blank]

Resolution Type: Neutral

Service Representative: Help Managers

Related Articles: [Blank]

Mark for Knowledge Base: Yes

Complexity: [Blank]

Manager Notes: [Blank]

Estimate (Days): [Blank]

IHLTaskStatusOrder: 6

Category: Troubleshooting

Attachments: Illiad Billing Mgr Error Fix.docx

By choosing the ILLiad request type the issue is automatically routed to the correct person(s).

There is space to enter comments on the solution.

Requests can be marked to be included in the Knowledge base.

In this case a document outlining the 20 steps to fix the issue is attached.