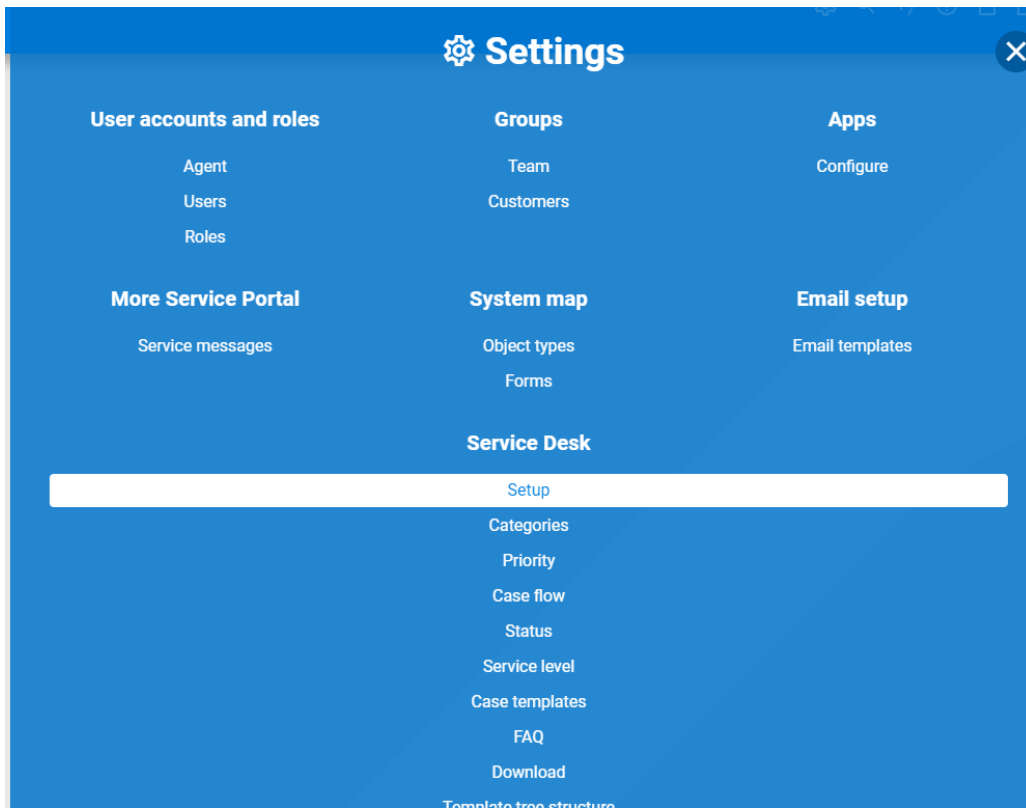


New Forms

Forms are created in Settings menu Setup and is very convenient for obtaining correct and adequate information.



Then click FORMS

SET / CHANGE

Set to

Selected template catalog: Helpdesk

More Service Portal Settings

SETTINGS BY DEPARTMENT

(Appearance, information text and feedback function)

SETTINGS BY CUSTOMER

(New case, filter & FAQ)

SHARED SETTINGS

(Menu Links)

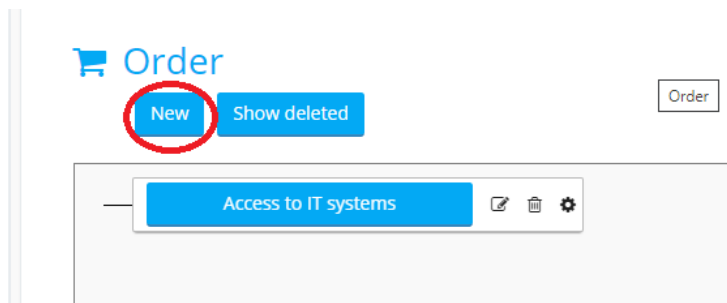
FORMS

Roles

Problem Manager

Change Manager

Then New



Give the new form a name. Then create the new form by dragging elements from the list to the right into the Drag and drop area.

New employee

Text Field

Required ☐

Label

Help Text

Placeholder

Class

Name

Access ☐ Limit access to one or more of the following roles:

Value

Autocomplete

Button

Checkbox Group

Date Field

File Upload

Header


Hidden Input

Paragraph

Number

Radio Group

Select

Click the edit button  to set the name and values to the new form field.

Click close at the bottom of the field editor when you are done setting field values.





Value

Type

Length

Close

When the form is finished, click Save at the bottom right of the form editor.

 Radio Group
 Select
 Text Field
 Text Area
User selector advanced
User selector simple

{ } Save







Examples of useful checklists can be:

- New employee
- Access form professional system
- Order form
- Workstations and equipment
- Order form
- New mobile phone

The form is available in Order in the left menu in User Portal.

John Doe ▾
(Technet)

Navigation

-  Start
-  New case
-  Cases
-  Order
-  Questions And Answers
-  Log out

Order

- [Access to IT systems](#)

Here is an example of a form users fill out:

Access to IT systems

Name

John Doe

Username

johndoe

Department

Sales

Workplace

Office 241

Is the workplace equipped ?

- ☒ Yes
☐ Partially
☐ No

Does the equipment work ?

- ☐ Yes
☒ No

Defect equipment

- ☐ PC
☒ Monitor
☐ Keyboard
☐ Mouse
☐ Phone (if applicable)

Send

The «Send» button (of type Submit) creates a case in the More Service inbox with a completed

+ NEW CASE

(3) INBOX

(0) MONITORING

NEW CHANGE LOG

Number: 1 (Total: 1)

Actions

Case ID Type

1

Number: 13

Id

Schedule: 4 - 1

Schedule: 4 - 5

Schedule: 4 - 5

Schedule: 4 - 5

Schedule: 4 - 5

Schedule: 4 - 5

Schedule: 4 - 5

Schedule: 4 - 5

Schedule: 4 - 5

Schedule: 4 - 5

Schedule: 4 - 5

Schedule: 4 - 5

Inbox

Received	Type	Subject	User	Department
2020-06-15 12:...		Access to IT systems	John Doe	
2020-06-09 11:55		Returned mail: see transcript for details		
2020-06-09 09:39		Undelivered Mail Returned to Sender		

Subject

Access to IT systems

Username

johndoe

Name

John Doe

Customer

Email

tms02@tmsportal.no

CC

Phone

12323434 - 98877665

Type

Brukenweb

Attachments

None

Create as

Incident

REGISTER

MERGE

ADD TO THE CASE

DELETE

LATEST

2020-06-09 09:38 - 1 - [Bestilling]

0*

Access to IT systems

User

John Doe (johndoe) - 12323434 - 98877665 - Technet

Templates

Affects

SL Type

Category

Priority

Start within

Object search

Consume

DESCRIPTION

ATTACHMENTS (0)

TASKS (0)

RELATED CASES (0)

MERGED CASES (0)

FORM (1)

EXTRA

OUTLOOK

OPEN FORM

Click OPEN FORM to view the form sent from User Portal

0*

Access to IT systems

User

John Doe (johndoe) - 1

Templates

Category

Object search

DESCRIPTION

ATTACHMENTS

OPEN FORM

Agent

Admin Admin

Status

Not started

NEW WORK LOG

NEW EMAIL

User Form

X

Access to IT systems

Name

John Doe

Username

johndoe

Department

Sales

Workplace

Office 241

Is the workplace equipped ?

☒ Yes

☐ Partially

☐ No

Does the equipment work ?

☐ Yes

☒ No

Defect equipment

☐ PC

☒ Monitor