



# SHAREPOINT DEVELOPMENT WITH NO CODE

**Developing A Help Desk System With  
SharePoint Office 365 and Infowise Solutions**

## Executive Summary

- **"Zero Code" Custom Solutions**
- **Rapid Application Development**
- **Software Developer - Not Required**
- **Integration with O365 Ecosphere**

According to the latest survey conducted by RightScale.com 93% of organizations are running or experimenting with infrastructure as a service<sup>1</sup> and the latest survey from CIO.com shows that 90% of organizations are using the public cloud.<sup>2</sup> Office 365 has eclipsed all other cloud providers to "emerge as the most widely used enterprise cloud service by user count".<sup>3</sup>

Global App Casting followed this trend and implemented the Office 365 ecosystem for their email, document management, office products and collaboration. Office 365 and SharePoint met their immediate business needs but email and spreadsheets weren't going to be enough. They needed custom software to run their business.

The decision in the past has always been to buy or build. Global App Casting looked to buy a Help Desk solution but the one-size-fits-all software approach would not meet their needs. Next, they looked for a solution inside of SharePoint thinking it would provide the degree of flexibility and integration they required. InfoPath provided early promise but they realized it would not be enough. The SharePoint App Store pointed the way to the Infowise Ultimate Forms App and from there they were able to build a Help Desk solution that was custom without customized code and integrated with their Office 365 ecosystem.

Arthur Hu, CIO of Lenovo, in a recent interview said that the SharePoint development platform "addresses the demand problem by shortening development times and empowering users in the business."<sup>4</sup> Using SharePoint's already shortened development timeline and **Infowise Ultimate Forms** code free development, Global App Casting's Help Desk solution points to the future of business software solutions.

## No Code Solutions

Writing a custom SharePoint Help Desk solution was not an option for Global App Casting. That would require hiring a SharePoint Developer and inheriting a software development lifecycle of code and maintenance. Mikkel Nygaard, Head of Process & Procedure Management for Global App Casting, looked for other solutions and eventually decided upon Infowise Ultimate Forms for several reasons:

- Easy to find videos and training about the product.
- Clear examples of successful products built with SharePoint and Infowise.
- Quick and responsive help.
- One-on-One training available.
- Easy to develop solutions without advanced code.

Mr. Nygaard put it best... "I had no experience with SharePoint or software development – but **with Infowise I can build solutions** that would have taken a long time to learn if I had to use SharePoint Designer or other tools. Some of the things we do today can't be done without a tool like Infowise."

The Help Desk solution that Global App Casting built took advantage of several Infowise tools all without any coding:

**Smart List Pro** - This turned regular SharePoint Custom Lists into smart, easy to use forms with tabs, interactive help and icon fields.

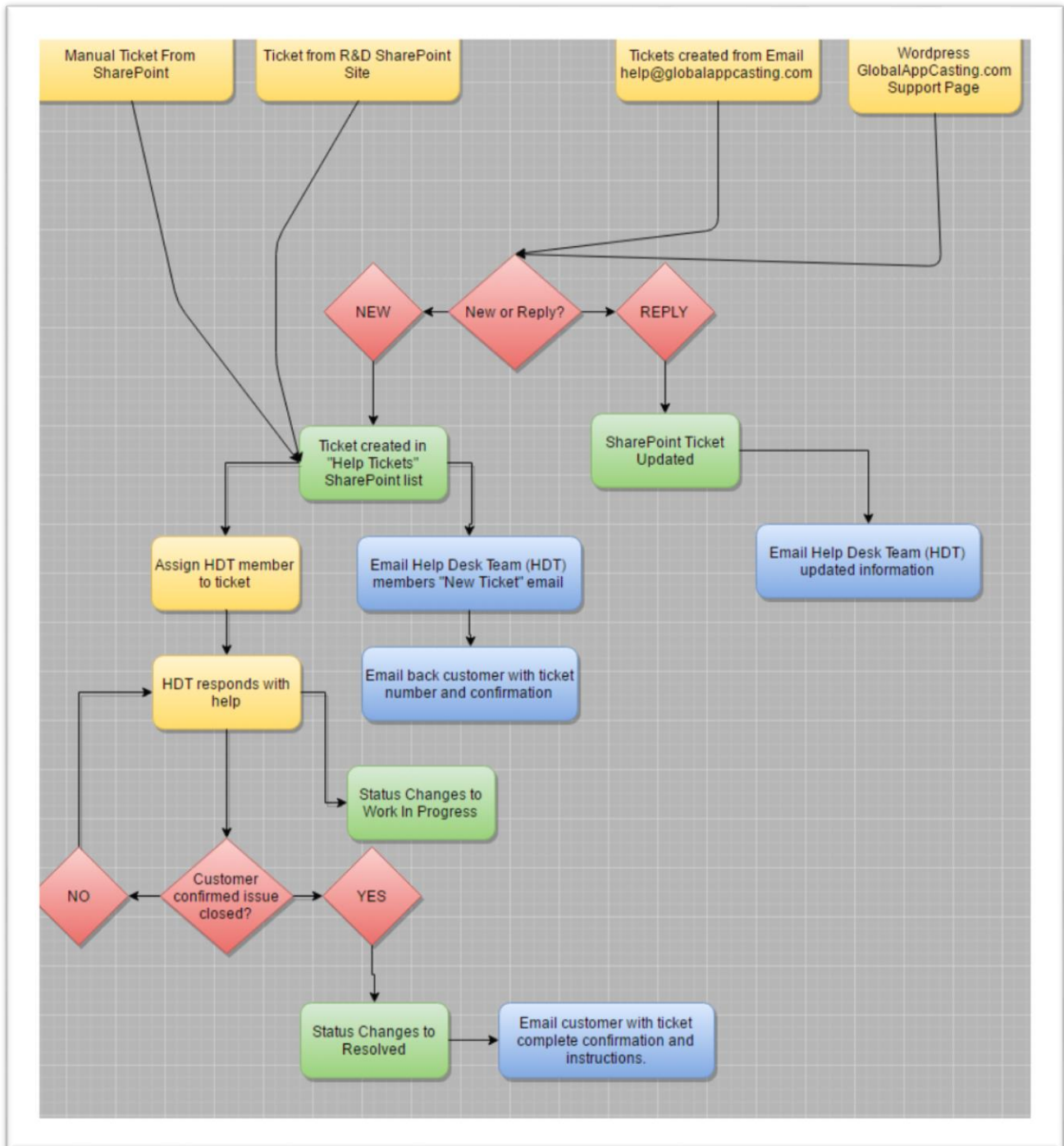
**Smart Import Pro** - Integrating with email and Office 365 Exchange was key to making the Help Desk work both for internal and external email and Smart Import Pro's one page of configurations simplified the task.

**Smart Alert Pro** - Highly configurable alerts and alert templates simplified user interaction and went way beyond out-of-the-box SharePoint Alerts.

## Help Desk Solution in Pictures

Here are a couple of screenshots of the Help Desk Solution that gives a glimpse into what SharePoint and Infowise were able to do.

This flow diagram defines the Help Desk system and how the ticket will flow in from Email, WordPress and different Office 365 SharePoint sites.



In this picture we can see some of the features of **Infowise Ultimate Forms** being implemented such as tabs and icons in fields.

The screenshot displays a web-based form for creating or editing a ticket. The interface includes a top toolbar with standard actions like Paste, Copy, Delete, Attach File, and Spelling. Below the toolbar is a navigation bar with three tabs: 'Main' (selected), 'Email History', and 'Workflow'. The form fields are organized into a grid. Annotations with red arrows point to specific features: 'Tabs separating fields' points to the navigation tabs; 'Color icons for visual cues' points to a green triangle icon next to the 'Priority' dropdown; and 'Hidden fields based on security and context' points to a small calendar icon next to the 'Due Date' field.

Field	Value
System Ticket Type	R&D
Ticket Name	
R&D Ticket Type *	New User
Priority *	Normal
User type *	Internal
First Name	
Last Name	
Job Title	
Phone	
Country	
License	
Comments	
Status *	Reopened
Received Date	11/24/2016 13:23
Start Date	11/25/2016 11:34
Closed Date	11/25/2016 13:29
Assigned To	Help Desk x
Due Date	11/26/2016
Description	

Here are some of the **Smart Actions** built to manage the Help Desk tickets. This is a configuration based alternative to writing custom workflows in SharePoint designer.

Back to Site > Actions: Helpdesk Tickets

## Actions: Helpdesk Tickets

**Actions... no workflows... no SharePoint Designer**

Action name	Action type	Run on	Events	Manual	Repeat	Conditions			
1 Send Reopen Email Alert	Send e-mail	Edit		No	Yes	Yes	Delete	Edit	Export
2 Set User User Reopened ticket back to NO	Update list item	Edit		No	Yes	Yes	Delete	Edit	Export
3 Send e-mail if the user has sent in an email response	Send e-mail	Edit		No	Yes	Yes	Delete	Cancel	Export
4 Set User Responded Via Email back to NO	Update list item	Edit		No	Yes	Yes	Delete	Edit	Export
5 Set Default Ticket Data	Update list item	New		No	Yes	No	Delete	Edit	Export
6 Update ticket status to Duplicate	Update list item	Edit		No	Yes	Yes	Delete	Edit	Export
7 Update status to Work in Progress	Update list item	Edit		No	Yes	Yes	Delete	Edit	Export
8 Update ticket status to Resolved	Update list item	Edit		No	Yes	Yes	Delete	Edit	Export
9 Update last workflow fields	Update list item	Edit		No	Yes	Yes	Delete	Edit	Export
10 Reset ---SELECT---	Update list item	Edit		No	Yes	No	Delete	Edit	Export
11 Create Knowledge Base Article	Create list item	Edit		No	Yes	Yes	Delete	Edit	Export
12 Reset Move to Knowledge Base	Update list item	Edit		No	Yes	No	Delete	Edit	Export
13 Update System Date	Update list item	Edit; Timer-based		No	Yes	Yes	Delete	Edit	Export

▪ Import

**Configuration based development... No Code**

### Add/Update Action

General Settings | Advanced Settings | Action Settings | Conditions

User Responded Via Email after change equals Yes

And Affected us always equals

Add

This screen for **Smart Import Pro** shows the power of configurations. In one screen we build the rules for importing emails to create, reopen and update tickets.

### Profiles

Name	Type	Actions
Import New Tickets	Email	3 <a href="#">Import History</a> <a href="#">Delete</a> <a href="#">Cancel</a>

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### General Settings

Name:

High frequency [?](#):  Yes

Start time [?](#):

Polling schedule:

- Hourly
  - Frequency in minutes:
- Daily
  - At:
- Weekly
  - At:  on
  - Sun  Mon  Tue  Wed  Thu  Fri  Sat
- Monthly
  - At:  on

Notify on errors:

---

### Data Provider Settings

Type:

Protocol:

Email:

Delete messages from server

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### Action Settings

Name	Type	Delete	Edit
Create ticket	Create list item/document	<a href="#">Delete</a>	<a href="#">Edit</a>
Update ticket with more info - Not Closed	Update list item	<a href="#">Delete</a>	<a href="#">Edit</a>
Update ticket with more info - Closed	Update list item	<a href="#">Delete</a>	<a href="#">Edit</a>

**Smart Alerts** are a powerful tool to create custom communications at every stage and state of the system. Custom email templates ensure that users are getting exactly the information they need in their email.

The screenshot shows the 'Alerts: Helpdesk Tickets' configuration interface. It features a table of existing alerts, a 'Smart Alerts' dropdown menu, a 'Custom email templates' section with an 'Add or update mail template' button, a 'Field Integration' section, and a 'What To Send' section. A 'Training' sidebar is also visible on the right.

**Smart Alerts**

Title	Site	List
Help Desk Ticket Created - Notify GAC	Help Desk	Helpdesk Tickets
Help Desk Ticket Created - Notify Requestor	Help Desk	Helpdesk Tickets
Helpdesk Ticket - Change Assign To	Help Desk	Helpdesk Tickets
Helpdesk Ticket - Close the ticket	Help Desk	Helpdesk Tickets
Helpdesk Ticket - Respond to User	Help Desk	Helpdesk Tickets
Helpdesk Ticket - Ticket Reopened	Help Desk	Helpdesk Tickets
Helpdesk Ticket - Work in Progress	Help Desk	Helpdesk Tickets
Onboarding - Employee Reminder	Knowledge Center	Knowledge Center
Onboarding - Employee Tasks Complete	Knowledge Center	Knowledge Center
Onboarding - Welcome to GAC	Knowledge Center	Knowledge Center

**Custom email templates**

Add or update mail template

Template: Help Desk - Notify Requestor

Name: Help Desk - Notify Requestor

Subject: Global App Casting - Ticket GAC:[ID|ID] - Status: New

Body

**Field Integration**

\*\* This is an automated response, please do not reply. \*\*

Hello [Requester\_x0020\_NameRequester Name],

We have just received a support call from you. It has been logged and forwarded to be handled by the appropriate person. Please expect a response within 24 business days.

Your Support Call ID: GAC:[ID|ID]

Use this ID for future inquiries either by responding to this email or including it in the **subject** line of a new email.

Link to Ticket - [SiteURLItem Link]

**What To Send**

- Item is added
- Item is modified

**Training**

- [Alerts] Introduction
- [Alerts] Best Practices
- [Alerts] Recipients
- [Alerts] What to Send
- [Alerts] When to Send
- [Alerts] Mail Templates

Include updated columns

Highlight updated columns

Insert attachments or document

Share template with all users



## The Future

Business will change and software needs will change. Technology is quickly moving beyond the buy/build paradigm into a world where we continuously reconfigure tools and apps too meet business needs.

Global App Casting gives us a glimpse of this future with rapidly developed configuration based solutions using **Infowise Ultimate Forms** and SharePoint Office 365. This tailored approach ensures that Global App Casting has the right amount of software for their needs at every stage of their business growth.

If you would like to know more about Infowise:

**Take a look at our Training:**

<http://infowisesolutions.com/training/>

**View videos on our YouTube Channel:**

<https://www.youtube.com/user/InfowiseSolutions>

**Watch webinars:**

<http://infowisesolutions.com/webinars.aspx>

**Contact support:**

[Support@InfowiseSolutions.com](mailto:Support@InfowiseSolutions.com)

**Contact sales:**

[Sales@InfowiseSolutions.com](mailto:Sales@InfowiseSolutions.com)

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