smartsheet

IT Requests and Ticketing

Template Set Getting Started Guide

The IT Requests and Ticketing template set helps streamline IT requests and track outcomes and team performance.

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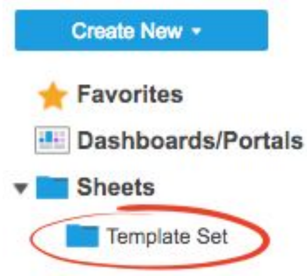
REQUIREMENTS: This template set is designed for **Business and Enterprise Plan** users. If you're on a Team or Individual plan, you can still use template set, however, premium features, such as dashboards, Automated Actions, Activity Log etc. will not be available.
[Identify your plan and user type]

Get the Template Set



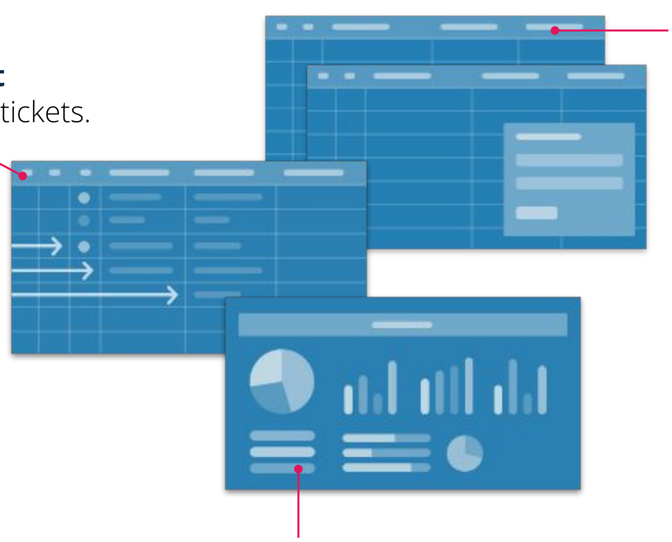
Click the link below and the template set will be added to your Sheets folder, you can find it on the left side of the screen under Sheets.

[IT Requests and Ticketing Template Set]

What's Included in the Set

With the IT Requests and Ticketing template set, you can quickly gain visibility into created versus resolved tickets and outstanding items so you can take action faster.

Unresolved Tickets Report
Easily see and manage open tickets.



IT Ticket Tracking Sheet
A single sheet to triage, assign, and track ticket progress.

IT Ticket Metrics Sheet
A central repository that rolls up metrics across all tickets.

IT Submission Form
A simple intake form that feeds tickets directly in the IT Ticket Tracking sheet.

IT Ticket Tracking Dashboard
A dashboard that summarizes key information about your IT tickets.

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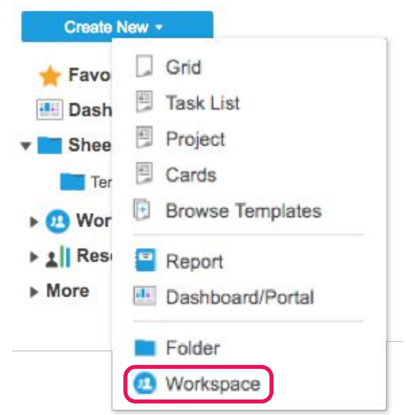
Set Up

Using a workspace is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

Step 1:
Create a new workspace

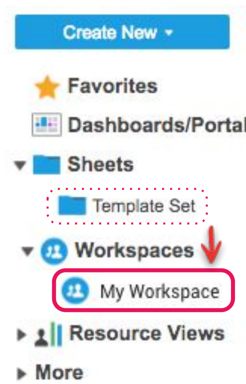
Open *Home*, click the *Create New* button, and select *Create New Workspace* from the drop-down menu. Name the workspace.



Learn more:
Workspaces Overview, Workspace Sharing, Home Tab

Step 2:
Drag the files into workspace

Select the downloaded template set folder under your *Sheets* folder and drag the entire folder over to the workspace you just created. Once the workspace is highlighted, drop it in the folder.



Learn more:
Manage Items in a Workspace (Add, Move, Remove)

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Customize

Step 3:

Edit IT Ticket Submission Form

The IT Ticket Submission Form is how people submit new IT ticket requests. Submissions are then added to the IT Ticket Tracking Sheet where you can track request items and assign them to your team. Open the IT Ticket Tracking Sheet and click on *Forms* in the top menu to customize the submission form.

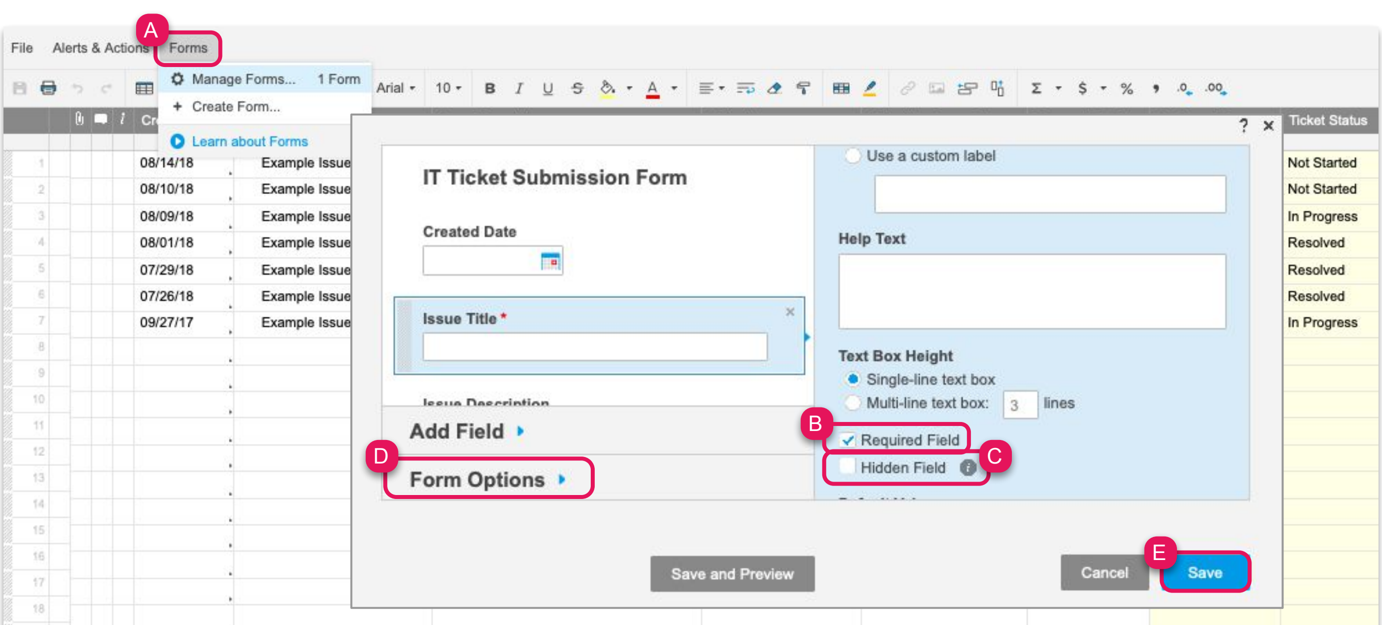
A. Click on *Manage Forms* and then *Edit* to customize the existing fields. You can add or remove fields, change field titles or descriptions, and modify *Form Options*.

B. Mark fields as required that you want to ensure employees complete.

C. Leave *Ticket Status* as a hidden field with a default value of *Not Started* so that it will trigger your sheet.

D. Set your form to be filled out only by a *registered Smartsheet user* to ensure that the *Requestor* column is automatically populated.

E. Click *Save* to close the form builder and copy and save the URL displayed. Give this URL to anyone who will be submitting a ticket. You can also share it via email, hyperlink, or embed it on a website.



Learn more:

[Forms, Edit Existing Fields]

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Step 4:

Set Up the IT Ticket Tracking Sheet

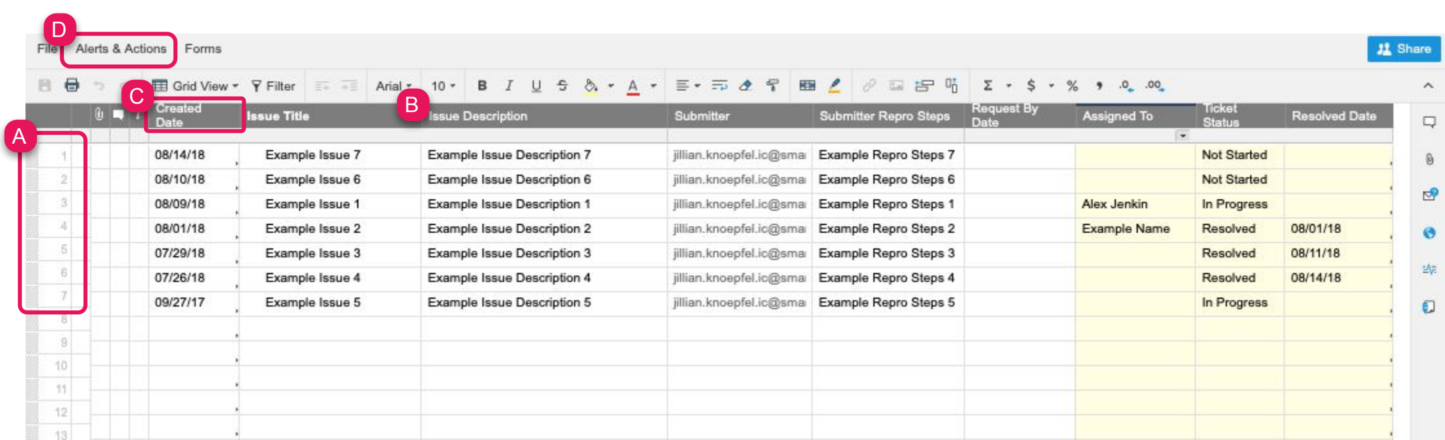
The IT Ticket Tracking Sheet contains the ticket information and important items that your team would like to track. Use it to collect, triage, and manage your IT request tickets. You assign tickets in the Assigned To column, which is a *Contact List* column type. It's a best practice to use *Contact List* columns when assigning owners because they can be leveraged to set automated actions, notifications, reports, and more.

A. Delete rows with example data.

B. Add or rename columns to best fit your organization needs.

C. You can rename the *Created Date* and *Resolved Date* columns, but they need to exist in the sheet for the charts to work properly.

D. A notification has already been set on this sheet to notify anyone shared to the sheet when a new request ticket has been assigned to them. To view or edit the notification rule, click on *Alerts & Actions* and select *Manage Alerts & Actions* in the dropdown menu. Then double click on the Request Ticket Assigned Notification rule in order to open the rule editor window.



Learn more:

Use the Best Column Type for Your Data, Notifications: Keep Track of Sheet Changes, Control Who Can Receive Notifications from Your Sheet, Managing Contacts, Creating an Auto-Number Column, Use a System Column to Automatically Add Information to a Row

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Step 5:

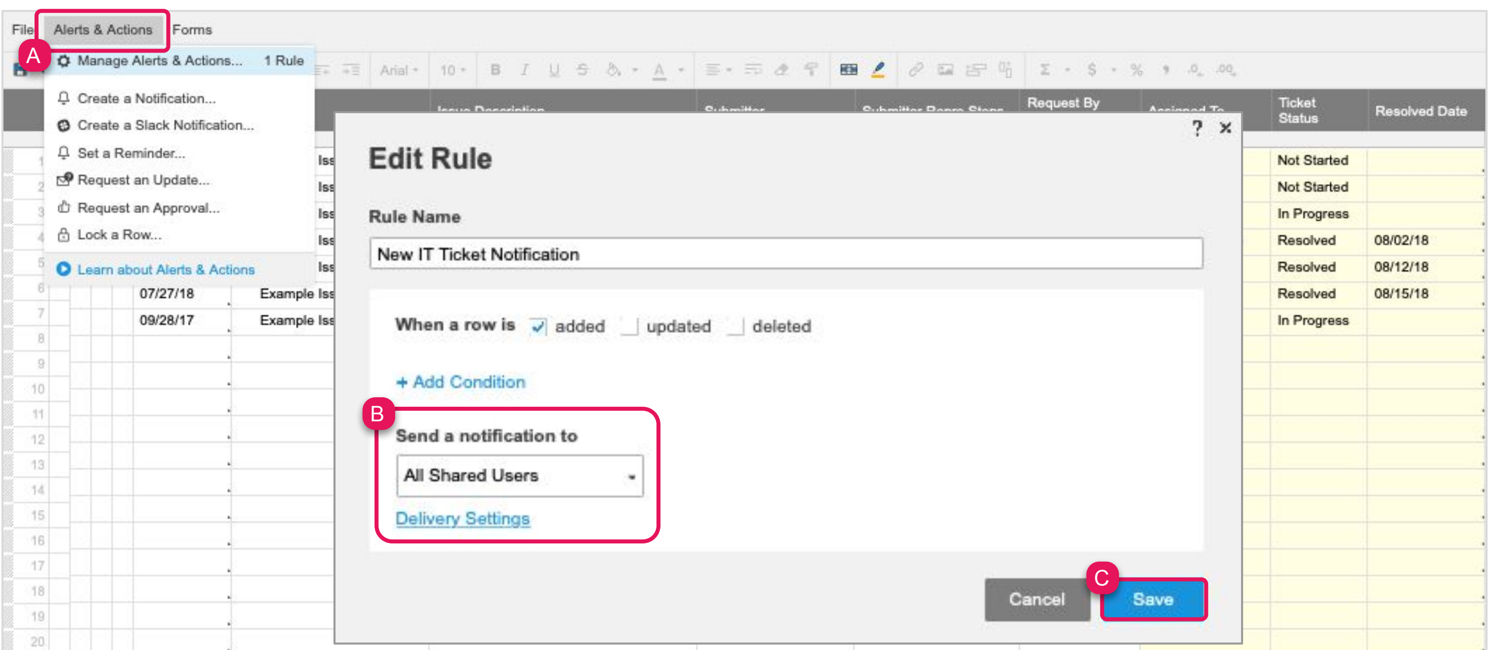
Customize the New IT Ticket Notification

An automatic notification is a great way to keep track of changing information on your sheet. The New IT Ticket Notification is setup to notify those shared to the sheet when a new IT ticket request has come in via the form.

A. Modify the notification by going to *Alerts & Actions* and select *Manage Alerts & Actions* in the dropdown menu. Then double click on the New IT Ticket Notification rule in order to open the rule editor window.

B. Customize the rule to when you want to be notified and the *Delivery Settings*.

C. Then insert your email address in the *Send a notification to Shared user or email*. Then click *Save.*



Learn more:

[Notifications: Keep Track of Sheet Changes](), [Control Who Can Receive Notifications from Your Sheet]()

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Step 6:

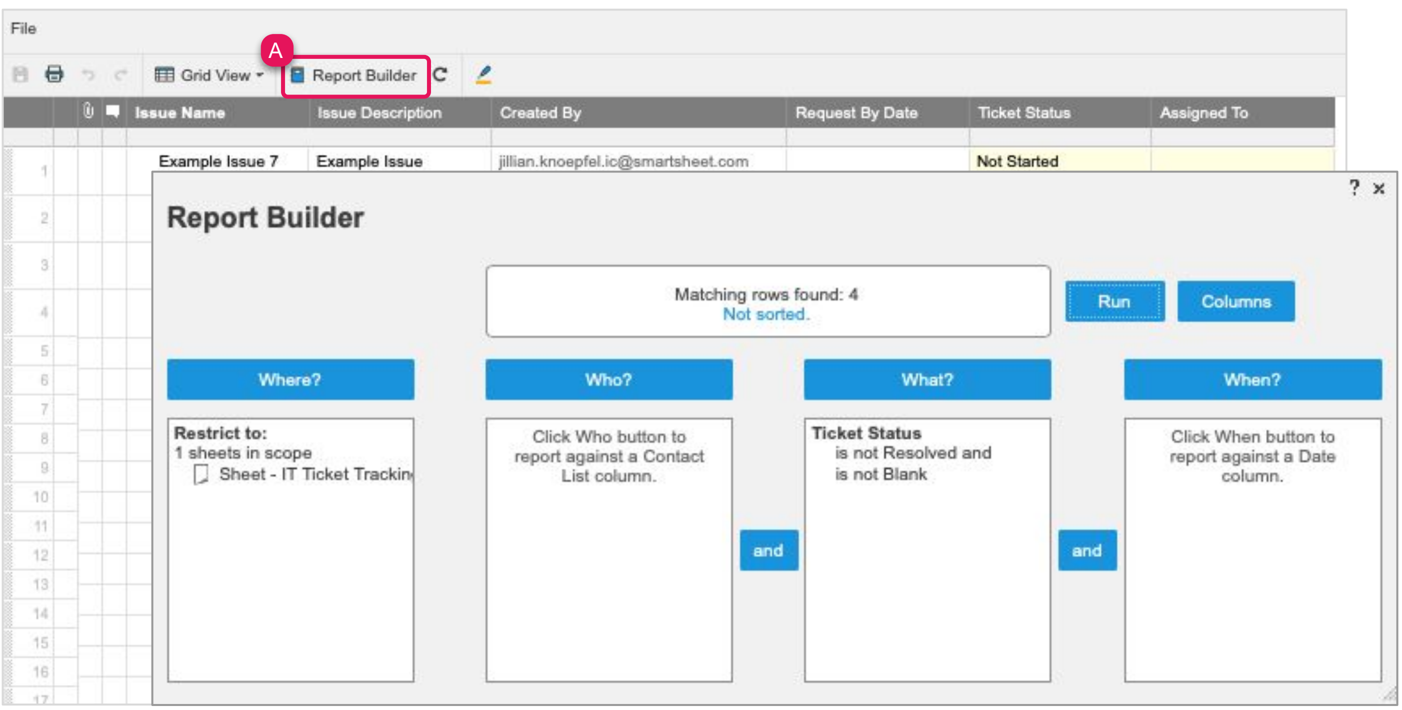
Customize the Unresolved Ticket Report

The Unresolved Ticket report allows your team to easily see and manage open tickets. You can also use a report to create a view that allows all of your team members to see their own assigned tasks without having to create multiple reports. We recommend creating a second report using the *Current User* for the filter on the *Assigned To* column. Then, add a shortcut to the Dashboard so team members can focus on their assigned items.

A. Open the *Report Builder* and ensure your *IT Ticket Tracking sheet* is selected.

B. Use the *Columns* button to select all of the columns you want to display in your report.

C. In the *What* field of the Report Builder, filter the report to if *Ticket Status is not Resolved* and *is not Blank.*



Learn more:

[Report Builder]

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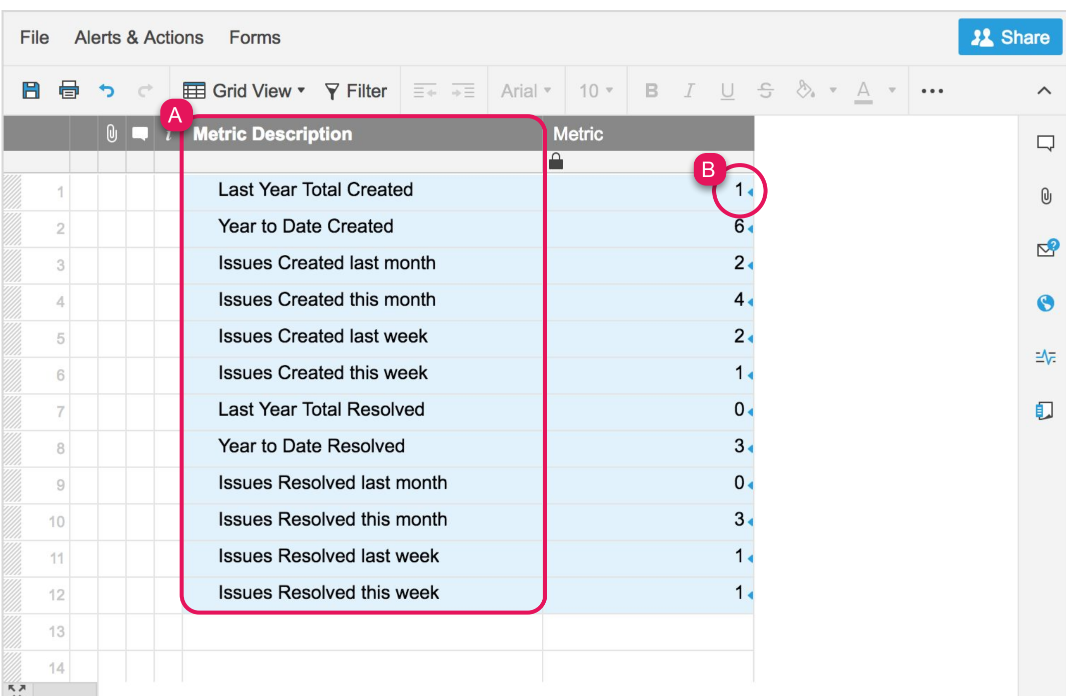
Step 7:

Setup the Ticket Metrics Sheet

The IT Ticket Metrics Sheet is entirely driven by formulas. One set of formulas focuses on year-over-year, month-over-month, and week-over-week for resolved tickets. The other set focuses on created tickets. Note: It is not recommended to give editor (or higher) sharing permissions to this sheet to ensure formulas stay intact.

A. Before deleting rows from the Ticket Metrics Sheet, look at how they work in the IT Ticket Tracking Dashboard.

B. All items in the *Metric* column are using cross-sheet formulas, which you can edit to look at different data.



Learn more:

[Cross-Sheet Formulas]

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Step 8:

Monitor Your IT Ticket Tracking Dashboard

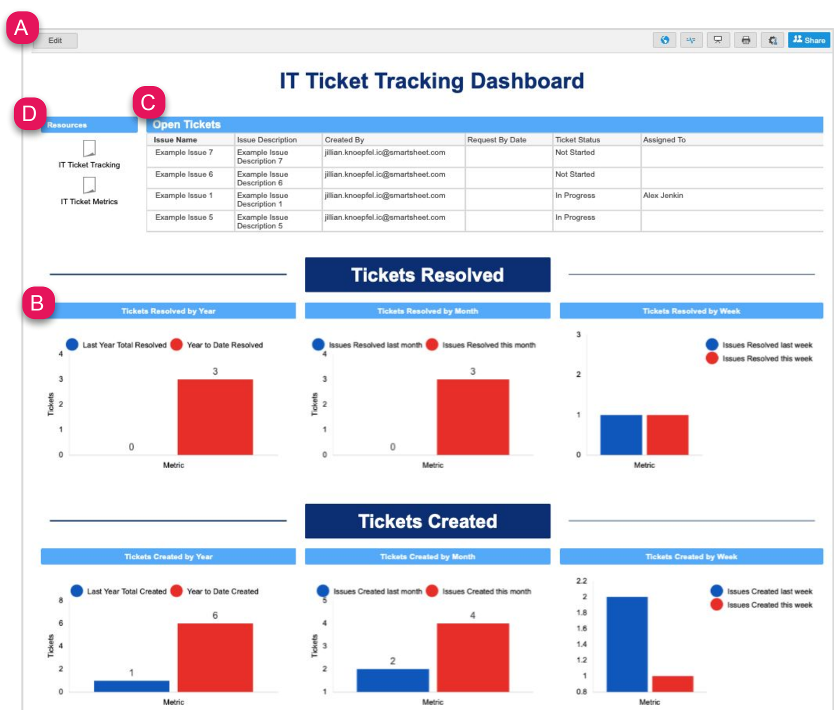
The IT Ticket Tracking Dashboard allows you to centralize, track, and manage your IT ticketing process in one place. Dashboards are made of different widgets that pull in live information from your other sheets and reports.

A. Add or edit widgets as needed. Click *Edit* in the upper left corner to begin customizing. Then hover over any widget and select the *pencil icon*.

B. The charts under Tickets Resolved and Tickets Created are *Chart* widgets, creating column charts from the formula values on your IT Ticket Metrics Sheet.

C. Open Tickets is a *Report* widget that displays your live report in the dashboard.

D. Resources is a *Shortcut* widget with links to your sheets. Feel free to add a shortcut to the URL for the IT Ticket Request form and other documents and resources.



Learn more:

[Make Changes to an Existing Dashboard](), [Viewing and Sharing a Dashboard](), [Widget Types for Smartsheet Dashboards]()

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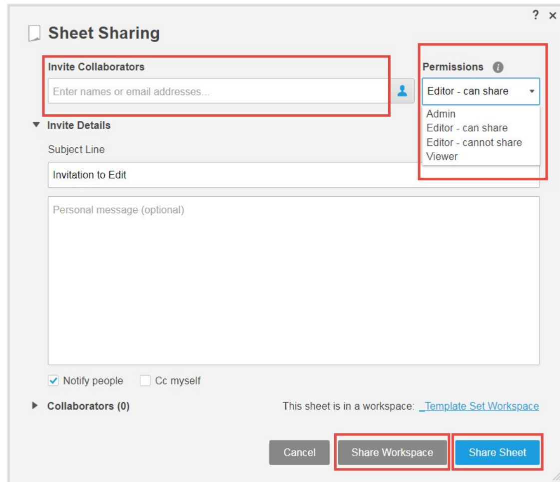
Step 13:

Share Your IT Requests and Ticketing Template Set

Sharing is the best way to collaborate with others involved in your projects. You can share your entire workspace with members of your department, or share individual items within the workspace. For more information on sharing and permission levels, check out this infographic.



Learn more:

Workspace Sharing

FEEDBACK: Let us know what you think of the IT Requests and Ticketing template set! Share your feedback here.