IT Service Desk Workflow Management in versaSRS HelpDesk

Service Level Management – The Keystone of versaSRS HelpDesk

This document outlines IT Service Desk Workflow within versaSRS HelpDesk.

versaSRS HelpDesk is a packaged application enabling organisations to quickly and effectively deploy comprehensive service level management processes with a minimum investment.

versaSRS HelpDesk has been developed and built around the concepts of service level management. Tickets can be automatically assigned case types, priorities, keys, group, due dates, tasks and much more according to SLA routing rules created within versaSRS HelpDesk. For example, queue routing rules can automatically set ticket priority and due date can be applied to a queue. This can be dependent on the email address sent from or set globally for all email send addresses.

Comprehensive reporting is made possible via the application’s own Reporting Dashboard, for comprehensive data and statistics on KPIs (for example time/effort involved in resolution) and key SLA factors. Alternatively, versaSRS HelpDesk works seamlessly with Microsoft SQL Reporting Services.

This document covers:

1. Ticket creation
2. Incident Management
3. Problem Management
4. Change Management
5. Asset Management
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1. Ticket Creation

Logging a new incident ticket with the IT Service Desk

Tickets (Calls or Cases) can be logged via various methods in versaSRS HelpDesk:

- **Manually** by help desk operator via phone call or in person
- **Email** sent from user to predefined help desk email address
- **Web-Based eForm** completed by user
- **Incoming phone call** from user via telephone system with **CTI (CCE) Capabilities**

New Ticket Creation via Manual Method

The user has contacted the service desk via phone or in person. The service desk operator creates a new ticket and enters the information for the incident as provided by the user within the Case Details screen (below). The operator can also apply pre-defined ticket creation templates, to rapidly speed up the ticket creation process.

The service desk operator will then determine the fields to be selected such as Case Type (for example “Incident”), Received By, Queue, Group, Owner, Priority Level (for example Critical= 1, High = 2, Medium = 3, Low = 4, As agreed = 5), Due Date (if not driven by Priority) and other fields if required.
New Ticket Creation via Email

The user sends an email to a predetermined service desk email address. Each queue within versaSRS HelpDesk is assigned a primary email address. When an email is sent to that address the email will create a new call/ticket within the queue that is assigned that email address.

Tickets created via email in versaSRS HelpDesk can be manipulated with regard to the default queue settings and routing rule settings within the application. These settings are accessible by the Administrator(s) of the application under the Manage Queue screen:
Routing rules are available to Administrators of the application under the Manage Routing Rule screen:

Routing rules when applied look at in-coming email and if certain conditions are met (To address, From address and Subject of mail) can predetermine how the emails are handled. In-coming emails can then be routed to a certain Queue, Group, Owner, Case Type, Priority and have Keysets applied if required.

**New Ticket Creation via eForm**

The user completes a web-based form, either within the domain network or externally. The eForm (when accessed over network authentication) can determine user details (for example username which will allow for discovery of department or company) automatically for addition to ticket information if required (User will be Primary Requestor on ticket).

The eForm is custom designed and dynamically handled, according to business rules as various selections are made on the form by the user. An example eForm on the following page highlights various criteria required by the service desk. Each field within the eForm will consequently drive how the ticket will be created with regard to Queue, Group, Owner, Case Type, Priority, Due Date, Keysets and as much information as is required by the service desk. These selections can therefore automatically apply SLAs for a given company, service or group.

eForms (ASP.NET) can dynamically load **versaSRS HelpDesk** data into drop down menus where required, and can easily be altered via xml settings.
<table>
<thead>
<tr>
<th>HR Services</th>
<th>IT Service Desk Workflow Management in versaSRS HelpDesk</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Payroll Support Organisation (Incident Form)</td>
<td></td>
</tr>
<tr>
<td><strong>Customer Details</strong></td>
<td></td>
</tr>
<tr>
<td>Requester</td>
<td></td>
</tr>
<tr>
<td><strong>Incident Details</strong></td>
<td></td>
</tr>
<tr>
<td>Brief Description</td>
<td></td>
</tr>
<tr>
<td>CSG Impacted</td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td></td>
</tr>
<tr>
<td>Date of Incident</td>
<td></td>
</tr>
<tr>
<td>Client</td>
<td></td>
</tr>
<tr>
<td>No. of Employees Impacted</td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td></td>
</tr>
<tr>
<td>Payroll Area Impacted</td>
<td></td>
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<tr>
<td>Date Payroll Due to Occur</td>
<td></td>
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<tr>
<td><strong>Description Details</strong></td>
<td></td>
</tr>
<tr>
<td>Process or step where incident occurred</td>
<td></td>
</tr>
<tr>
<td>Have you been able to perform the required process or step in the past? (Yes) (No)</td>
<td></td>
</tr>
<tr>
<td>Detailed description of incident, (please provide as much detail as possible including screen print)</td>
<td></td>
</tr>
<tr>
<td>Add Attachment</td>
<td></td>
</tr>
<tr>
<td><strong>Contact Details</strong></td>
<td></td>
</tr>
<tr>
<td>Please Note:</td>
<td>- All incident reports that fail to provide primary and secondary contact will automatically be recorded as a Severity 3.</td>
</tr>
<tr>
<td><strong>Primary Contact</strong></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>Telephone (including country code &amp; area code)</td>
<td></td>
</tr>
<tr>
<td>Mobile (including country code &amp; area code)</td>
<td></td>
</tr>
<tr>
<td><strong>Secondary Contact</strong></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>Telephone (including country code &amp; area code)</td>
<td></td>
</tr>
<tr>
<td>Mobile (including country code &amp; area code)</td>
<td></td>
</tr>
<tr>
<td>Logged By: Chein Phu</td>
<td>Submit</td>
</tr>
</tbody>
</table>
New Ticket Creation via Phone System with CTI (CEE) Capabilities

The user has followed prompts by selecting options within phone system. When a certain predefined combination of numbers has been selected by the user, and the phone call is taken by the service desk operator, one, or a series of URLs are launched within versaSRS HelpDesk that pre-populate fields within the Call Details screen. The service desk operator can then make further enquiries if required to record more incident information when creating the ticket.
2. Incident Management

Once the ticket has been raised as an incident it will need to be assessed by the service desk operator (this will determine if the incident is Level 1, 2 or 3).

The service desk operator will determine whether there is there a known resolution for the incident by searching knowledge base articles for the issue. The operator can search within issues related to the three key sets assigned to the ticket. Case creation templates can also be automatically applied based on key selection rules.

If there is a known resolution the knowledge base article is linked to the call and sent to the user via email, or provide resolution over the phone with reference to the knowledge base article. The ticket can be then updated as “Resolve & Close”.

If there is no known resolution of the ticket the ticket will be set as Level 2 or 3 and if required Priorities, Group and Owner can be selected for the ticket. The owner (or assignee), once assigned the ticket will be notified via email and will then seek to resolve the incident.
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The ticket owner reviews the ticket to determine if the incident can be resolved, and provides resolution details to the requestor. If the ticket can be resolved it is updated with “Resolve & Close”, “Add comments to Solution” and “Consider for review” if solution should be considered for a knowledge base article.

If the ticket cannot be resolved it will be escalated according to business process. The ticket owner can assign a new priority, move ticket to another queue and assign a new group and owner. When the ticket resolution is found, it can then be updated with “Resolve & Close”, “Add comments to Solution” and “Consider for review” if solution should be considered for a knowledge base article. (See Update Case screen below)

Logging an Incident Example

- Use the Call Type “Incident”, “Request” or “Task”
- When logging a call, check to see if there are any other incidents similar by doing a sort on Keys in the Queue related to the ticket (for example “Help Desk Queue”).
- If there are similar incidents, it may be time to create a problem ticket. (See section on Problem Management.)
- Check to see if there are any problems like this incident currently open by doing a key search in the “Problem” queue.
- If a problem is found, it can be linked as a child to the incident ticket.
- NOTE: From the problem you can click on the Links tab to see other incidents and perhaps see what, if any, workarounds can be used until the problem is resolved, e.g. “reboot”, “shut an application” down, etc.
3. Problem Management

Depending on business processes, Problems are often raised by a service desk operator as a result of many incidents, or as the result of a known issue. In versaSRS HelpDesk, problem tickets can be created with the Call Type “Problem” and assigned to the “Problem Management” queue, if problems and incidents are required to be separated between service desk teams.

- **New Problem Ticket Is Raised with Call Type “Problem”**

  - **Problem Identification**
    - Record basic details that relate to problem / one or many incidents

  - **Classify Problem**
    - Specify Category, Priority and Key Sets within versaSRS HelpDesk

  - **Do we have workaround or solution for the problem?**
    - **Yes – Known Error**
      - Knowledge Base linked with key sets

  - **Problem Analysis**
    - Knowledge Base & Reporting

  - **Request for Change**
    - Provide resolution to the user
    - Create change request ticket against the problem case

- **Close the Problem**

- **One or many incidents(s)**
  - Incidents linked to problem ticket within versaSRS HelpDesk
4. Change Management

The change management workflow within versaSRS HelpDesk is outlined below:

New Change Ticket Is Raised with Call Type “Change Request”

What is the type of Change?

- Emergency
- Significant
- Major
- Minor
- Standard Change

Change Classification
Change Manager filters changes and classifies them allocating priority & Key Sets.

Skill Groups Assigned

Emergency Committee
Change Manager requests recommendation from the board members

Change Manager
Change Manager approves and schedules changes and reports to CAB

Preapproved Changes are rolled out faster

Change Advisory Board
CAB Members look at the change plan, review the risk and recommend go ahead or not.

Forward Schedule of Changes (FSC)
Schedule Authorized Changes

Release Management
Implement Changes
Educate Users

Post Implementation Review
Close the Change
A change request may be raised as the result of a problem request and therefore linked to the original problem ticket. Change requests may also arise independently as a business request.

The operator (Change Manager) creating the change request ticket records the details of the change within the case details. An appropriate skill group is assigned to the ticket (For example “Emergency”, “Significant”, “Major”, “Minor” and “Standard Change”). These skill groups are set within the Administration of the Queue settings in the application.

Depending on the skill group assigned, the ticket will be handled by the appropriate group & ticket owner. In the case of the request being reviewed by the Change Advisory Board (CAB), change request information is reviewed and approved or denied. All communication between the requestor, change manager and CAB can occur within the application or via email.

If approved by CAB, a Forward Schedule of Changes (FSC) can be included within the ticket, either as an attached document or via pre-defined, pre-created task templates or newly created tasks, via the tasks module within versaSRS HelpDesk (Screen below).

Changes are implemented according to the FSC. Users are educated where required. The change request ticket is updated accordingly by the change manager so the current status set is correct.

The change manager reviews the implementation, if successful the ticket can then be closed. If unsuccessful a rollback plan may be necessary, and reviewed according to business processes.
4. Asset Management

 versaSRS HelpDesk enables you to document all your IT assets such as workstations, printers, routers, switches, and access points and maintain all of the asset details in one place. The versaSRS HelpDesk Asset Management module lets you create and assign asset id and asset name to uniquely identify assets. It allows for creating relationships between incidents, problems and change request tickets, thereby building a history and links to cases and requests.

Detailed Asset Inventory

The Asset Management module provides detailed information such as model number, Location, Manufacturer, Status, Quantity, Lease, Purchase details, Warranty as well as detailed asset configuration and installation details.

Software Library

 versaSRS HelpDesk Asset Management module can store all software installed within your organization and tracks licenses. You can report on purchased versus installed software and rarely used licensed software that helps you streamline software license management.

Asset Relationships

When an IT Service goes down, do you need to know how many users will be affected? versaSRS HelpDesk helps you report on and manage relationships between assets and people.