# HelpLINE
# Product Description

## Productivity and Service Functionality

The primary function of a service desk product is to allow the customer service or support department to record incidents and resolve them, while keeping track of all details and progress. An *incident* (in this context) can be anything that requires some sort of action or response by the customer service department, whether it is a problem, a request or an enquiry, reported by an internal user or an external customer. You may know them as *calls*, *cases* or *tickets*.

The industry requirements for a service desk are to:

- **Report** new incidents accurately
- Expedite incident **resolution** to maintain Service Level Agreements (SLAs)
- Keep customers **informed** and involved
- **Manage** an effective and low cost process
- **Tailor** the service desk to the business
- **Automate** the support process
- **Integrate** with other applications
- Increase support **productivity**

A customer service organisation is only as good as its processes. Being extremely flexible, HelpLINE allows you to implement and improve on your ITIL and other business processes.

To meet your service desk requirements, HelpLINE provides the following functionality:

## Submitting new incidents

With HelpLINE, your customers can report incidents easily:

- by logging on the HelpLINE Self Service web interface
- by filling in a customised Service Request form on your website
- by phoning or emailing the Service Desk, who will enter the incident details into HelpLINE

The data entry screens need only include fields that are appropriate to your use of HelpLINE. Any relevant files can also be attached to an incident (e.g. log files, screen shots, Word documents, spreadsheets), in the same way as attaching a file to an email.

With HelpLINE Self Service, your customers also have configurable access to your knowledgebase, so they may not even need to report a new incident, saving valuable time at the Service Desk.

The HelpLINE interfaces for Self Service and the Service Desk just require a browser (no software installation), and allow access by customers and support staff at any time of day or night.

Using HelpLINE's user profile database, the details of an incident can be linked to the customer's default environment (for example, the computer equipment they use, or the product you have sold them).

To make things even easier for your customers, you can configure HelpLINE to use LDAP Authentication so that they don't have to remember yet another username and password for HelpLINE. They will logon using the same credentials as they normally use for the Active Directory account, etc.

## Resolution of incidents

Once incidents have been reported, HelpLINE enhances the effectiveness of your support team during the resolution process. The support team have access to a site-specific knowledgebase, as well as previously resolved incidents, allowing them to resolve similar incidents quickly and in a consistent manner. This increases their productivity and enhances the service given to your customers.

Incidents can be escalated if they are left too long without a response or resolution, according to your SLAs (Service Level Agreements). Or if you don't have SLA's, HelpLINE can just send regular reminders to the relevant support personnel, to prevent an incident from being forgotten.

Your support staff can access HelpLINE at any time of day or night, and from any computer with a browser, even at a customer site or from home. *Diary entries* are added to each incident to document its progress to resolution. Additional files can be attached to an incident at any time.

Support staff can easily email information or further questions directly to the customer from HelpLINE, to keep them informed and expedite the resolution process. A very powerful advanced feature of HelpLINE allows the customer's reply to be automatically routed into the HelpLINE incident, and the relevant support personnel notified – this offers a huge productivity advantage.

## Communication

Keeping all parties informed during the resolution process is the key to good Customer Service. Your customers can receive automatic emails containing personalised information to confirm a new incident, when it is closed, and at other configurable times. You can also send them customised reports of their outstanding incidents or support history, at regular intervals.

HelpLINE Self Service can reduce the load on your Service Desk by allowing your customers to view the detailed status of all their own incidents, as well as reviewing past solutions.

Your support staff can be automatically notified when incidents are assigned to them or their support group, and warned when incidents are approaching their SLA limit. Again, these emails can be fully customised. As mentioned above, the support staff can also email the customer from HelpLINE, with any reply optionally routed directly into the HelpLINE incident.

As well as email, further custom notification methods can also be configured (e.g. to a pager or SMS text messaging for urgent incidents).

## Management reporting

The right reports are essential to help you identify trends in your incident data, for effective pro-active problem management. HelpLINE provides a wide selection of customisable reports, which can be regularly printed or emailed to management personnel as appropriate. It also allows you to generate ad hoc reports at any time, based on flexible criteria.

HelpLINE's reports allow you to analyse your incident status and history by customer, category, support personnel, location, etc. to give you the information necessary for addressing the causes of the incidents and therefore reducing the load on the Service Desk.

Your customised Dashboard report can be generated onto your intranet site, to give you a snapshot of your Service Desk activity in real time. This is customized to show the metrics that <u>you</u> need to keep in touch with what is happening.

Management can also be alerted about individual incidents relating to key customers, to ensure that levels of customer service are maintained.

## Service Levels

From a Customer Service aspect, the Service Level Agreement (SLA) is the key measure of a Service Desk's effectiveness. HelpLINE helps you to meet your various SLA obligations more easily with its flexible and powerful timed escalation of incidents. Incidents can be escalated if they are left too long without a response or resolution, according to the rules for the particular category, customer, and/or other criteria. HelpLINE also has the facility to "stop the clock" when the incident is back with the customer or in some other state, with additional reminders to ensure that it is not forgotten.

When an incident approaches or breaches its SLA, appropriate personnel can be warned and relevant action taken. Your customised Dashboard report can highlight such incidents, helping you to maintain your levels of Customer Service.

HelpLINE's reporting facilities provide statistics of performance against your SLAs, to help identify areas for improvement.

## Customisation

Customisation is a vital aspect of an effective Service Desk, to make it an integral part of your organisation. As such, HelpLINE can be highly customised in many ways. At its core, you can add unlimited extra fields to the database to allow relevant information to be stored about an incident, specific to your organisation. These extra fields can optionally be linked to specific incident types (categories). You can also store extra information about each of your customers.

The data entry screens can be customised for both your customers (for Self Service) and your Service Desk and support staff, for ease of use and enhanced productivity. You can hide certain fields as appropriate for different groups of users. Screen text can also be customised, for instance translated into different languages.

All notification messages (by email, etc.) can be highly customised in both format and content.

All the supplied reports can be based on customised criteria, and if you have the relevant 3rd party software, you can also create your own customised reports and automate them using HelpLINE. Reports can be produced in many formats (PDF, HTML, Word, Excel, RTF, etc.)

## Automation

Automation facilities enhance the productivity of your support team and the quality of your customer service, by performing some of the more repetitive tasks and enforcing your processes for a more consistent service. The automation facilities in HelpLINE include both scheduled tasks (such as automated reports) and automation based on change of status (such as when an incident is assigned, escalated, closed, etc.).

New incidents can be automatically assigned to the most appropriate member of the support team based on a variety of configurable data.

The powerful automation facilities in HelpLINE can help you configure a work-flow application, to mirror the processes required in your organisation. For example, creation of an incident to prepare for a new employee say, can trigger the creation of a number of subordinate incidents and assign them to different support personnel for action. Where actions must be performed in sequence, the incident can be automatically routed to the next analyst in the sequence and the status updated. Diary entries can be automatically added where appropriate to track the flow, and extra notification messages can be configured to move the process along.

Escalation of an incident can trigger further automated actions, as well as notifications. For instance, when nearing its SLA limit, the priority could be raised or the incident transferred to a manager.

## Integration

Using HelpLINE's advanced integration module, information can be imported from other applications for incident and user data (for example, Active Directory for user data, or a system monitor for incident data). For bulk changes, tools are provided to help load data from spreadsheets into your HelpLINE database.

HelpLINE can also export data to other applications, at configurable points in the resolution process.

HelpLINE can also be configured to use LDAP Authentication, so that it does not need to store and maintain separate passwords. Users can access HelpLINE with the same username and password that they use elsewhere, reducing the risk of forgotten passwords, and the Service Desk time involved with resetting them.

## Productivity

All the features of HelpLINE described above will enhance the productivity of your support department.

HelpLINE's site-specific knowledgebase will increase productivity by helping your customers (via Self Service) to resolve issues without even reporting them, and your Service Desk operators to resolve incidents immediately without having to assign them to more skilled support staff.

Appropriate customisation of your data entry screens will save time when reporting new incidents, and when processing them through to resolution.

Automation of your notifications, escalation, work flow, reporting, etc. can reduce the trivial and routine tasks to be performed by valuable support staff, and avoid errors. The email facilities within HelpLINE also provide immense productivity gains.

HelpLINE's management and reporting facilities enable the Service Desk to be managed more effectively and pro-actively.

HelpLINE allows you to automate password resets, for both HelpLINE and Active Directory (whether or not you are using LDAP Authentication).

HelpLINE's seamless integration facilities eliminate the need for (and risks associated with) duplicate data entry.