

The Ten Key Features You Need in a Service Desk Solution

How to make your users happy and your IT staff more productive



INTRODUCTION

In many ways, the service desk acts as the face of the IT department. It enables most interactions between users and IT, including problem reporting and resolution, and it sets the tone for support initiatives across an organization. Indeed, an effective service desk can ensure that IT is perceived as a strategic business partner, and not just a break/fix organization.

Therefore, finding a service desk solution that enables you to keep users happy and makes your job easier at the same time is a critical task that requires careful consideration. This white paper details the 10 key features to look for in a service desk solution.

1. COMPREHENSIVE INCIDENT MANAGEMENT

A service desk must provide effective incident management throughout the entire ticket lifecycle. You need a solution that enables issues to be easily reported, accurately prioritized by severity, efficiently assigned to appropriate technicians and centrally tracked to resolution.

Each of these steps is critical. Easy problem reporting will help drive user adoption of the solution. Ticket prioritization ensures that the most critical issues are addressed promptly, maximizing value. And correct ticket assignment and centralized tracking help ensure prompt resolution and accountability.

Automating ticket creation, prioritization, escalation and closure reduces service desk workload and speeds issue resolution.

The best solutions offer configurable policies that assign tickets based on a variety of factors, including the support technician's location, skill set and current workload. Some even enable you to set up a hierarchy of multiple support queues to meet the needs of different departments and capture the dependency relationships of related tasks, helping to ensure that issues are resolved correctly and completely.

2. AUTOMATION

Manual processes in any part of the ticket lifecycle increase both service desk workload and the risk of error while eroding user confidence and productivity. Look for a solution that automates:

Ticket creation

Ticket creation can be automated in several ways. Look for a solution that streamlines problem reporting for users by automatically including critical information, such as system configuration and user history, right in the ticket, or otherwise making that information readily available to technicians. Some solutions even enable systems or devices on your network to automatically create tickets in the service desk queue through an email interface. For example, a printer might proactively report that it is running low on toner or a network monitoring product might open a ticket about an alert, without any manual intervention required.

Also, make sure the solution enables you to create standard processes for repeatable tasks, such as onboarding of new employees, and include interdependent activities that might have a preset sequence and require approvals at multiple levels. Once the process is created, multiple interdependent tickets should be automatically created and assigned to appropriate personnel each time you run it. Solutions that allow tickets to be set up with parent-child relationships can even automate the closure of dependent tickets.

Ticket assignment and escalation

As noted earlier, ticket assignments can be automated through policies that consider factors such as the skill set and availability of the IT engineer, maximizing the value of every resource. Also, look for the ability to send email escalation notifications if tickets are not addressed promptly or progressing as required.

Related IT processes

It's worth noting that automation of other IT processes can proactively prevent issues from ever impacting users and resulting in a service desk ticket in the first place. For example, automated software patch management can eliminate a significant number of service desk requests while also enhancing security, availability and user satisfaction. Therefore, be sure to consider the total value of each solution you evaluate.

3. EFFECTIVE COMMUNICATION

Two-way communication between users and service desk technicians

Effective communication has multiple dimensions. The first is communication between users and service desk technicians. A solution that provides feedback and communication to the user throughout the ticket lifecycle — including easy visibility into incident status and ownership — will eliminate calls requesting status updates, improving productivity all around while increasing user satisfaction and confidence.

Communication in the other direction is equally important. Users need to be able to easily report issues and respond to requests for additional information. What might seem like small features can make a big difference. For example, some solutions enable users to paste a screenshot directly into a service ticket from the clipboard, eliminating a tedious multistep process of pasting it into another application such as Microsoft Word, saving the file and then uploading the file to the ticket.

Moreover, this two-way communication should extend beyond the ticketing process. Look for a solution that enables IT to proactively provide users with information such as alerts about known issues, possible workarounds and updates on progress toward resolution. Look for a solution that offers both push and pull options. For example, the service desk should be able to send email notifications and also offer a web-based portal that users can go to on their own schedules to access a knowledge base of common issues and fixes, as well as view announcements about service outages, planned maintenance windows and other information. By keeping users informed about service availability, this feature can minimize the number of tickets that are logged with the service desk for known issues and improve user confidence that IT is on top of problems.

Communication within IT

Communication within IT is also critical. Everyone involved in a given ticket needs to be able to access information about its status, as well as information needed for resolution. For example, enabling technicians to access a knowledge base and information about similar issues, either in progress or already closed, can speed issue resolution.

In addition, look for a solution that provides detailed reports to track help desk workload and performance to assess compliance with service-level agreements (SLAs). Automatic ticket escalation ensures effective communication about issues that are not progressing toward closure.

4. SELF-SERVICE CAPABILITIES

Perhaps the best way to reduce IT workload while simultaneously improving user satisfaction and productivity is to choose a service desk solution that includes comprehensive self-service capabilities. Self-service is a clear win-win: Users love it because they do not have to wait for the service desk to resolve problems that they can manage themselves, and the business saves considerable time and money.

The classic example is password resets, which can make up a significant percentage of service desk requests. If users can answer a few questions to verify their identity and then reset their own passwords, they can quickly get back to work — and service desk workload plummets. Similarly, not forcing users to go through the service desk to get instructions for resolving common problems, install IT-sanctioned applications or check on the status of their support tickets saves time and effort for everyone.

Look for a solution that also enables users to:

- Manage and reset their passwords
- Review hardware and software inventory information for their systems
- Access a knowledge base of common issues and fixes
- View announcements about service outages, planned maintenance windows and so on
- Install or update IT-approved software
- View the status of their existing tickets and provide additional information
- Submit new support requests

5. EASY CUSTOMIZATION

Service desk features need to be fully customizable for your organization's unique requirements, practices and IT processes. Look for a solution that enables you to customize:

- **Fields and their possible values** — You should be able to easily customize values such as ticket status, priority and category to align with your unique business processes. You should also be able to dynamically reference data from other sources, such as the location or cost center associated with an asset. And custom fields should support HTTP links so that tickets can include URLs to external files and pages.
- **Default settings** — Look for a solution that enables you to define a default set of values for each type of ticket to help ensure data quality. For example, when a request is made to replace the toner cartridge for a printer, the category for that ticket should be set by default to an appropriate value.

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- **Consoles and reports** — Departments or individuals should be able to see the information most relevant to their needs. For example, managers should be able to easily review only closed tickets of a particular type or get summary data on technician performance.
- **Detailed incident views** — Look for a solution that enables custom ticket views based on the role of the user. For example, a certain group of engineers might be interested only in tickets in the application and network categories, and not desktop or access tickets.
- **Escalation rules** — You should be able to define rules to notify affected parties and escalate ownership of a ticket once a certain amount of time has passed with no resolution or if an SLA has been breached.
- **Email notifications** — You should be able to customize both the content and the template of email notifications. For example, you might want to include your company logo and confidentiality boilerplate in every notification, and establish standard notifications for outages, requests for additional information and status updates.
- **Workflow routing rules** — Look for a solution that can automatically assign ownership of a ticket based on the ticket type and the technician's areas of expertise.
- **Resolution time frames** — Be sure the solution enables granular control over resolution time frames based on factors such as ticket queue and priority so that you can more effectively manage your SLAs. For example, a high-priority ticket in the end-user issue queue might be assigned a four-hour resolution SLA based on a 24-hour clock, while a low-priority request in the facilities queue might have a one-week SLA that runs only during normal business hours.

6. REMOTE CONTROL CAPABILITIES

Delays, lost productivity and user frustration are inevitable if technicians have to physically visit users' machines to investigate and remediate problems. Moreover, since many organizations today span multiple geographical locations, this approach often forces

technicians to travel not just to other desks but to other sites, adding significant time and cost to the resolution process. Therefore, organizations of all sizes need a service desk solution that enables technicians to solve problems remotely, without desk-side visits.

To future-proof your investment, look for a solution that can obtain detailed device inventory information from any internet-enabled device and deploy software and scripts remotely. Also, verify that the solution provides remote control capabilities out of the box and also works seamlessly with third-party remote control solutions, so you have the flexibility to choose the tools that best meet your needs now and in the future.

7. MOBILE SUPPORT

Of course, support from the main office to satellite offices is only part of the service desk challenge. With today's increasingly mobile workforce, mobile support — for both users and service desk technicians — is critical. Ensure that the service desk solution you choose enables users to access the knowledge base, submit issues and check the status of their tickets from their mobile devices. This functionality is particularly helpful when users have desktop hardware failures that prevent conventional incident research and reporting.

Similarly, enabling technicians to easily and effectively manage support-related incidents from their mobile devices enables them to provide better and faster support, no matter their location. Look for a solution that supports real-time alerts on ticket events to any Android or Apple iOS device and provides easy-to-use workflows for creating, cloning, reviewing, updating, deleting and resolving tickets. In addition, a solution that makes it easy for the technician to call or email a user from within the service ticket reduces frustration for both parties while enabling faster resolution and better SLA compliance.

8. EASY INTEGRATION WITH OTHER SYSTEMS

Smooth integration with third-party remote control solutions is just the tip of the iceberg. By choosing a service desk solution that integrates easily with multiple related IT systems, you can dramatically simplify and streamline a wide range of service desk functions, saving you time and money. For example, some solutions enable technicians to access device inventory and device and user history, distribute software updates, deploy patches, or simply ping a host to check network status and latency — all directly from a single consolidated management console. This maximizes the effectiveness of service desk staff and speeds issue resolution, which in turn enhances user productivity and satisfaction.

Effective email integration is particularly important. Look for a solution that can automatically create incident tickets based on email from users or network-connected devices, such as voice-mail systems that record calls regarding employee absences, and devices (such as printers) that require frequent but irregular maintenance and repair. The solution should also be able to format outbound email messages to meet the needs of other systems.

9. SECURITY

Of course, security concerns permeate every aspect of the service desk. Throughout the ticket lifecycle, appropriate staff must be able to access the information they need to investigate and resolve issues, but nothing more. Users should have the permissions they need to check on the status of their own tickets only.

Look for a solution that integrates with your existing identity store (usually Active Directory) to deliver secure, seamless user authentication and role-based access. The solution should also enable

you to archive service desk tickets for compliance auditing and other purposes.

Mobile security is also essential. Verify that the solution you choose does not store information on mobile client devices to ensure that sensitive information is kept secure.

10. EASE OF IMPLEMENTATION AND USE

Finally, you need a service desk solution that you can install quickly and that both technicians and users will adopt readily. Solutions that require expensive professional services or the procurement of dedicated hardware are more costly to own and also slower to deploy, which hurts both return on investment and time to value.

Look for a solution that maximizes the value of IT staff of all expertise levels, without requiring extensive training. Features such as automated workflows, an integrated console and knowledge base, and easy customization all enhance IT staff productivity and effectiveness. Similarly, single signon that enables users to seamlessly access the self-service portal with their corporate logon credentials, along with an intuitive interface that enables them to easily find what they need without having to navigate multiple tabs, will help drive user adoption and the success of the service desk initiative.

CONCLUSION

An effective, efficient service desk is a critical component of any successful organization. By choosing a flexible, integrated solution that delivers secure, comprehensive incident management and request fulfillment, you can improve user productivity and satisfaction while reducing costs, ensuring compliance with SLAs, maximizing value and positioning IT as a strategic business partner within the larger organization.

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