

versaSRS HelpDesk

More than just a Help Desk ...

Features, Benefits and Capabilities

The screenshot displays the versaSRS HelpDesk interface, which is a web-based application for managing customer support requests. The interface is divided into several sections:

- Team:** A sidebar on the left lists various support teams such as General Support, NEW Support Requests, Post Sales Support, VIP Client Support, and Pre-Sales Support, each with associated team members.
- Cases:** A central table lists active cases with columns for Case Number, Status, Priority, Due Date, Requestor, and Problem. A search bar and filters are located below the table.
- Case Details:** A detailed view of a specific case (Case # 64192) is shown on the right, including the problem description, logged information, and a response form.
- Response Form:** A form for composing a response to the case, including fields for status, closure type, requestor, subject, and a text area for the message body. It also includes options for applying signatures and sending confirmation emails.

The interface is designed for efficient case management, providing a clear overview of all support requests and a structured way to handle and respond to them.

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versaSRS HelpDesk has been designed to automate your service desk processes and meet your business requirements.

Its flexible architecture makes it perfect for many departments and for many solutions—it is not just an IT Help Desk.

versaSRS HelpDesk is delivered to the desktop via the Web Browser using Microsoft .Net technologies. This is a key requirement for many businesses as there is zero deployment of software to the desktop.

Key Features

Call Logging

A **Call** is the basic building block around which a Help Desk or Service Request System is built. A **Call** is the request from a customer, the problem, or the request from an internal worker that needs to be actioned.

versaSRS HelpDesk allows calls to be logged in one of two ways:-

1. directly via the system (operator input)
2. via email

Each queue within **versaSRS HelpDesk** can be configured with a primary email address. Email destined for **versaSRS HelpDesk** is interrogated, and the 'mail to' address extracted, with the system attempting to map to the primary address of a queue.

One potential use for this is to allow sites to construct multiple queues e.g. sales, support, admin, employment, accounts etc, to support specific client requests.

versaSRS HelpDesk has been designed to automatically send an open confirmation email to either the primary or secondary requestor of the call. This email is template-based, and is unique to each queue as is the close confirmation email which is optionally sent when a call is closed (configurable).

For calls automatically logged via email, it is possible to disable the open confirmation email e.g. where a queue is set up to receive email-based server alerts, or pricelists from suppliers. In this case it would not be appropriate to send an open confirmation.

Each call is assigned a unique ticket number that is used by the system to track call-related correspondence e.g. if an email is sent to the primary requestor via the system and the requestor replies, the incoming email will automatically form part of the correspondence history for that call.

Alternatively, should an organisation receive an email outside of **versaSRS HelpDesk** that should be associated with a particular call, simply edit the subject field to include the appropriate ticket number and the system will attempt to attach that email to the corresponding case.

Templates

versaSRS HelpDesk provides the ability to create several types of templates. These include call templates and call update templates.

Call Templates allow the user to insert standard text into the call fields when first logging a call.

When logging a new call the call operator draws upon a template/system call. This will quickly prepopulate all areas of a call, as well as allowing the operator to edit it.

The operator may be prompted to apply a template as a result of selecting a key set i.e. key sets can be configured to drive templates. Since key sets are unique to each queue, it is possible to construct unique templates to each queue e.g. a key set for a sales queue may be structured based around a particular product and features which ultimately results in an appropriate product template.

Update Templates allow the user to set the text and call handling for a call update. This may be an internal email with known distribution email addresses and a completed email text.

Scheduled call templates. **versaSRS HelpDesk** includes a scheduling service, which has been designed to automatically log a call based on a call template and recurrence pattern. This can be used for reminders, client follow-up (CRM), notifications for maintenance renewals or repeated tasks to be performed by staff.

Call / Queue / Skill Group Watchers

A watcher is a person who wishes to receive email notification of any changes that occur for a specific call, queue or skill group.

A watcher does not have to be a user of the system and is defined by an email address. E.g. a manager at a remote site without access to the HelpDesk or an employee/administrator overseas with access to an email account.

A watcher receives an email notification each time the properties of a call, queue or skill group are changed. The email is based on a template known as the 'Watcher Template'. These templates are defined for each queue. Consequently the email that the watcher receives is governed by the queue that the call is assigned to.

"I've downloaded VersaCAT & VersaSRS, and I'm very impressed ...

Thank you for getting back to me so quickly. It's nice to see a company that takes an interest in the opinions of potential customers!"

William Kristoph
Systems Administrator,
Leon County Clerk of Courts.

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System Customisation

versaSRS HelpDesk has been designed to brand your system with your corporate logo. Your logo will appear within printer friendly areas of the system, and system reports generated by VersaDev's Reporting Dashboard (a standard feature of **versaSRS HelpDesk**)

The system also offers clients the ability to redefine the terms of the system via a custom labelling system. This feature has allowed our clients to use our system, not only for managing helpdesk and service related requests, but also allows clients to change the system to e.g. Project Management System (i.e. a call number becomes a project number), a corporate wide meetings manager or a student/school management system.

The ability to create 'child' tickets and assign actions to non-system users, combined with custom system-wide labeling, provides endless possibilities for the system where you need to manage people, projects, information and correspondence.

Support Material

Able to link associated files such as emails, screen dumps and error messages to the work order.

Audit Logs

versaSRS HelpDesk maintains a comprehensive audit trail and history of each call (contact, solutions, work orders, assigned staff and more).

' ... After a lengthy process of evaluating hosted and unhosted help desk solutions we came across the VersaSRS platform. We were immediately impressed with versaSRS' broad feature set, the wealth of information posted on their website and their willingness to allow us to experience the solution via their demonstration system without having to first jump over sales induced hurdles...

We have found the solution extremely easy to install, configure and customize but the most amazing aspect of the product is its rich and user friendly interface. In a world where the consumer has come to expect a trade off with web based systems between ubiquitous access and a rich user interface, the **versaSRS** system clearly demonstrates that a web based application can be just as rich as any native application with the added benefit of being easily accessible for customers and support representatives while also being centrally managed... '

**Randall O Walrond - President
IVR Technologies Inc, USA**

Key Modules

Knowledgebase

versaSRS HelpDesk contains an extensive Knowledge Base allowing the collection of problems and solutions for all users of the system.

- Can be published to one or more queues
- Can be used as a searchable knowledgebase for customers and employees in resolving their own system problems.
- Search the knowledge base for resolutions to known problems.
- Search for similar jobs.
- Search the knowledge base for articles with the same issue.
- Transfer issues into the knowledge base to build a library of information relevant to your organisation.
- Knowledge Base articles can include links to database-managed support documents (Drivers, Manuals etc), and allow clients to provide feedback for further system enhancements.
- The Knowledge Base may be searched, and appropriate articles/solutions that are found easily pasted into call correspondence.

Hot News Board

- Designed to support the publishing of notices and announcements to operators of the system.
- The Hot News publishing tool allows articles to be published to one or more system queues.
- Each article can be published for a period of time and will automatically expire.
- Articles can be re-published by simply changing the expiry date.

Events Manager

- Designed to capture significant event details.
- Each event is 'owned' by a specific queue but may be published across queues within the system.
- A correlation of events with calls logged with the system can be used to create enhanced and relevant reports.

Security Model

versaSRS HelpDesk's security model is based on a security profile that controls access to features of the system. A user's security profile applies to a given system queue. In addition to the security profile, a user may only access call data if they are a member of the appropriate queue. This level of security also extends to mining data via the call search and reporting dashboard.

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Contacts Module

The contacts module has been designed to manage company and individual contact details. Through custom system labeling and field mapping, administrators of the system can decide what contact data is recorded against a call.

Client Access Module (Self Service)

- ♦ Allows you to provide your employees, clients or customers with access to information and answers to their questions —at their convenience.
- ♦ Provides 24 x 7 support to your clients.
- ♦ Minimize pressure on technicians.
- ♦ Eliminate daily, mundane technical issues and control costs by allowing customers and employees to effectively help themselves. Clients can log their own jobs, search the knowledge base.
- ♦ Reduce call volume.
- ♦ Increase staff productivity.
- ♦ A cheaper and faster alternative to e-mail or telephone.

Asset Manager

- ♦ Store asset, vendor, leasing information for better management of company assets:
 - ♦ Assets Details - Category, Make, Version, Serial Number & Warranty Details.
 - ♦ Location Details - Company, Site, Department, Room.
 - ♦ User Details - Name, Telephone Number.
 - ♦ Peripherals/Non PC Assets - Category, Make, Version, Serial Number & Warranty Details.
- ♦ Comprehensive asset information can be stored.
- ♦ Record complete service histories of each asset.
- ♦ Link assets to clients, helpdesk jobs and other assets.
- ♦ Track the complete service history of assets.

Reporting Dashboard

- ♦ Create a variety of predefined reports using the Report Dashboard or use Crystal Reports to develop additional reports.
- ♦ Allows staff members to generate accurate, quantitative management reports and charts about company-wide issues, including statistics on the number, type and frequency of problems reported/resolved.
- ♦ Use reports to identify common problems.

Additional Features

Easy to use

An intuitive windows design in a globally accessible browser interface means training is easy and your staff will become productive quickly.

Economical

Realise a rapid return on your investment, with increased productivity and efficiencies while reducing response times and abandon rates.

Thin client technology (100% web-based)

- ♦ Provides enormous flexibility.
- ♦ Does not use technology that locks you to your desktop.
- ♦ No installation needed at the desktop (installs only on the server for easy maintenance).
- ♦ Allows you to serve remote locations.
- ♦ Minimal training required.

Easy call re-assignment to an individual or skill group

New call and due date alerts

Queue, skill group, user call watcher notifications

Customisable prioritisation of calls

Full management assign capabilities

Permits managers to coordinate, assign and delegate problem-solving among staff based upon workload and/or expertise.

True multi user, multi tasking programme

Open many screens at the same time.

"I tried 17 different customer support SW and, according to screen shots and feature list, I've found this one is the best, with most comprehensive list of features."

Robert Zenzerovic, Istracom D.O.O.

"... the VersaSRS HelpDesk has met and exceeded our expectations. It is very easy to use and we have configured it to meet our needs."

Sam Ray, Network Administrator, Micro Industries

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Issue escalation

- ♦ Ten customizable levels of call escalation per queue enabling appropriate actions to be taken.
- ♦ Colour coding of different escalation levels allow an 'at a glance' appraisal of how well Service Level Agreements are being met
- ♦ Alarm capability, which will notify assigned person(s) based on any criteria regarding a ticket.
- ♦ This assures you and your company that the most pertinent matters are taken care of immediately.

Convert existing SRS / Help Desk system data

Solutions to date include data migration from:

- ♦ Access database systems
- ♦ Lotus Notes based systems
- ♦ Oracle based systems

Benefits

Save time and money

Reduce the need for lengthy telephone support. Reduces staff involvement on recurring problems and issues.

Improve staff control

You gain immediate control over the support process. Your support staff are readily accountable for the quality and quantity of their responses and supervisors can be notified when tickets remain unanswered, or when a support consultant fails to provide an appropriate solution.

Ease of access 24/7

Using Web technology makes it possible to access the helpdesk from any computer with an internet/intranet connection.

Reduce end user support costs

A powerful search facility gives support specialists instant access to past problems and how they were solved. Over time, a substantial amount of collective knowledge and expertise accumulates in the **versaSRS HelpDesk** database. The search facility then becomes even more powerful, allowing support specialists to quickly deal with problems encountered before.

Identify problem areas

Using the Reporting Dashboard or reporting tools such as Crystal Reports, you can identify trends that point towards required actions.

Increase user satisfaction

Users are presented with support staff that are knowledgeable about their details and problems. Problems do not get lost or "fall through the cracks".

Build a corporate Knowledge Base

The substantial amount of knowledge that accumulates in the **versaSRS HelpDesk** database stays with your organisation even when support specialists leave.

Fast and easy to implement

With minimal training required.

Improve communication between your company, your customers and/or employees

Capabilities

IT/Support Staff Functions

Submit request / issues / enquiries

Helpdesk staff can submit a request, issue or enquiry for resolution with a concise description and receive a ticket number for future reference.

Update request

This function gives helpdesk staff the ability to alter or add additional information to a previously submitted help request.

Look-up ticket

Allow support staff members to search the database in order to review any submitted requests for assistance. Helpdesk users can search the **versaSRS HelpDesk** database for similar requests to find a valid solution and eliminate repetition.

Respond to tickets

Staff members can find and respond to their assigned trouble tickets. A typed response can be entered in the resolution field and the status of the ticket changed to closed. For future reference, the ticket is returned to the database.

Knowledgebase searching / search issues

Offers users a global Knowledgebase searching capability.

Receive email notifications

Add notes to issues

Add solution to issue

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Capabilities (cont)

Close issue

Create Knowledge Base articles

Access the Hot News Board for system-wide alerts and support issues

Administrator/Manager Functions

Assign tickets

Support management or administration can assign new trouble tickets for staff members to resolve. Administrators are able to manage their staff's efficiency by assigning tickets and re-assigning tickets according to the overall departmental workload.

Create job templates

Automatically log jobs

Based on job templates and recurrence patterns.

Manage Hot News articles

Manage system queues, skill groups and users

Establish issue types and subtypes (Keys) and set associated priorities

Manage notification templates

Open confirmation, close confirmation, due date alert notifications, queue, skill group and user call watcher notifications.

Manage the Knowledge Base system

Technology

- ♦ Microsoft ASP.Net
- ♦ Microsoft .Net Windows Services
- ♦ Web Services
- ♦ 100% web based

Client Requirements

- ♦ **Web browser:** Microsoft Internet Explorer 5.5 and above
- ♦ Pop-up blocking software disabled or app added to allowable site list
- ♦ Java Script enabled
- ♦ Cookies enabled
- ♦ Screen resolution 1024 x 768 (min)

Hosting Requirements

VersaDev provides a .Net DLL and a SQL Server 2000 database structure. Your company is responsible for providing the hosting server(s). Minimum hosting requirements are listed below:

- ♦ Microsoft Windows 2000 / XP / 2003 Server
- ♦ Microsoft Internet Information Server (IIS) 6.0
- ♦ Microsoft .Net Framework 1.1 (free download from Microsoft)
- ♦ SQL Server 2000 or the Microsoft SQL Server Desktop Engine (MSDE*) 2000 (MSDE is a free download from Microsoft)
- ♦ ASP.NET

About VersaDev

VersaDev is an innovative software company specializing in enterprise-wide mission-critical Microsoft .NET applications for businesses worldwide.

Our flagship product, versaSRS HelpDesk is HelpDesk/Service Desk software that is built on cutting-edge Microsoft .NET, XML, and Web services technologies.

versaSRS HelpDesk enables organisations to quickly and effectively deploy comprehensive Service, Incident, Configuration and Service Level Management processes with a minimum investment in infrastructure.

In addition, versaSRS enables businesses to leverage off their existing investments in technologies such as Microsoft's Windows and Internet Information Server and SQL.

VersaDev also provide custom software development for global enterprise clients with specific business needs in the areas of business process improvement, workflow and automation processes.

VersaDev's customers range from small to large companies in manufacturing, computing services, agriculture, retail, health, government agencies, universities and professional firms of all kinds.

We take pride in developing world class web-based solutions.

