Phase 4: Process Automation (Admin)

👉 **Goal:** Automate SSRS workflows to ensure faster resolution, accuracy, and accountability.

Step 1: Validation Rules

Validation rules enforce data quality by preventing incomplete or invalid entries.

- Example: Prevent closing a Service Request unless **Resolution Notes** are filled.

- Example: Ensure **Priority** is selected before saving a request.

These rules maintain data consistency and reliability across the system.

Step 2: Workflow Rules

Workflow rules are configured to trigger simple automated actions.

- Example: Send an **email alert** to assigned staff when a new request is created.

- Example: Notify customers when the **status changes to Closed**.

Workflows reduce manual communication and speed up response times.

Step 3: Process Builder

Process Builder is used for more advanced, conditional automation.

- Example: Automatically **assign requests** based on type (IT requests go to IT team, HR requests go to HR team).

- Example: Update **Status = In Progress** when a staff member is assigned.

This ensures requests are routed and updated automatically.

Step 4: Approval Process

Approval processes add structured oversight for critical cases.

- Example: **High-priority requests** must be approved by a Manager before closure.

- Example: Escalation approvals for overdue requests.

This improves accountability and ensures sensitive cases get managerial attention.

Step 5: Notifications & Alerts

Real-time alerts improve visibility.

- Email and in-app notifications for **new assignments**.

- Push notifications for **overdue requests**.

This ensures staff and managers are always aware of request progress.

Step 6: Escalation Rules

Escalation rules automatically reassign or escalate unresolved cases.

- Example: If a request is not updated within **48 hours**, escalate to Manager.

This helps maintain SLAs and prevents customer dissatisfaction.

Step 7: Testing Automation

Each automation is tested with sample data.

- Create test requests to confirm validation rules work.

- Simulate request assignment and closure to verify workflows, approvals, and escalations.

Testing ensures automation behaves correctly before production deployment.

✅ With these automations, SSRS becomes a **smart system** that reduces manual effort, prevents errors, and ensures timely resolution of service requests.