**IN-HOUSE IT HELPDESK SYSTEM**

**REQUIREMENTS:**

1. Process Flows
   1. Incident/ Issue Request – refer to flowchart
   2. Service Request – refer to flowchart
2. Build-up/ Look-up Tables
   1. Request Type
      1. Incident/ Issue
      2. Service
   2. Approval Status
      1. Pending Approval – service request awaiting clarification/ approval/ rejection
      2. Pending Clarification – service request with a clarification
      3. Approved – service request is approved
      4. Rejected – service request is rejected
   3. Request Status
      1. For Approval – new service request without full approval yet (i.e., Approval Status is Pending Approval or Pending Clarification) (note that incident request type does not go through an approval workflow)
      2. Cancelled – cancelled incident or service request
      3. Open – a new incident request or a fully approved service request
      4. On-Hold – an incident or service request that was put on-hold by the Technician
      5. Resolved – an incident or service request that was resolved by the Technician
      6. Closed – (1) a service request whose Approval Status is Rejected, or (2) a resolved incident or service request that was manually closed by the Requester or was auto-closed by the System (refer to the Closure Rules below)
   4. Priority
      1. Low – Affects only you as an individual
      2. Medium – Affects the delivery of your services
      3. High – Affects the company’s business
      4. Top – Utmost action needed as classified by Management
   5. Mode
      1. Self-Service Portal – if request was filed by the Requester via his IT Helpdesk portal
      2. Phone Call – if the request was raised via a phone call to the Technician (In this case, the Technician will file the request in behalf of the Requester)
      3. Chat – if the request was raised via chat messaging (i.e., Viber, Google Chat, SMS, etc.) to the Technician (In this case, the Technician will file the request in behalf of the Requester)
      4. Email – if the request was raised via Email to the Technician (In this case, the Technician will file the request in behalf of the Requester)
3. Setup – accessible by Administrators only
   1. Departments
      1. Department Name
      2. Description
      3. Department Head – select from Users list
   2. Operational Hours
      1. Working Days – checkbox for Mon/ Tue/ Wed/ Thu/ Fri/ Sat/ Sun
      2. Working Hours – Start Time to End Time
      3. Break Hours – Start Time to End Time
   3. Holidays
      1. Date
      2. Description
      3. Recurring – checkbox
         1. Auto create recurring holidays
   4. Support Groups
      1. Name
      2. Description
      3. Technicians – to add, select from Users w/ Technician/ Administrator roles
   5. Users
      1. To add new user, select from HRIS+ Employee DB list with Active Employment Status only.
      2. Fields
         1. Auto Fetch from HRIS+ Employee DB (Auto fetch for initial creation of account but editable)
            1. First Name
            2. Middle Name
            3. Last Name
            4. Suffix
            5. Employee ID
            6. Job Title
            7. Corporate Email Address
            8. Corporate Mobile No.
         2. Manually Inputted Fields
            1. User Access – Slider (to indicate user access status)
            2. Role – User/ Technician/ Administrator

Technician Fields

Associated Groups – select from Support Groups

Administrator Fields

Associated Groups – select from Support Groups

* + - * 1. Description – free text input
        2. Department – select from Departments Build-Up
        3. Reporting To – select from Users Build-Up
        4. Landline No.
        5. Local No.
        6. Service Request Approver – checkbox
        7. Requester Allowed to View – Only their own requests/ All their Department Requests
        8. Password Reset – input new password
  1. Technicians
     1. List of Users with Technician/ Administrator role
     2. Fields – same as User Fields above
  2. Mail Server Settings
     1. Outgoing Server Name/ IP Address – smtp.gmail.com
     2. Sender Name – IT Helpdesk
     3. Reply To – [no-reply@aspacphils.com.ph](mailto:no-reply@aspacphils.com.ph)
     4. Protocol – SMTP
     5. TLS Enabled – Yes
     6. Port – 587
     7. Required Authentication – checkbox
        1. Username – [no-reply@aspacphils.com.ph](mailto:no-reply@aspacphils.com.ph)
        2. Password - ycye cxhg kgbe ytaz
  3. Service Level Agreements (allows the system to compute a request’s Due By Date, and define escalation parameters)
     1. Incident SLAs
        1. List of Incident SLAs – Name, Resolution Time
        2. Add/Edit Incident SLA
           1. SLA Name
           2. Description
           3. Priority – select from drop-down (refer to Priority setup)
           4. Resolved Within (i.e, Resolution Time) – specify Days, Hours
           5. Escalation Levels

Level 1 Escalation

Escalate To – multiple add/delete; select from:

Ticket Owner

List of Technicians/ Administrator

Escalate Before Resolution Time – input Days, Hours

Level 2 Escalation

Escalate To – multiple add/delete; select from:

Ticket Owner

List of Technicians/ Administrator

Escalate Before Resolution Time – input Days, Hours

Level 3 Escalation

Escalate To – multiple add/delete; select from:

Ticket Owner

List of Technicians/ Administrator

Escalate Before Resolution Time – input Days, Hours

Level 4 Escalation

Escalate To – multiple add/delete; select from:

Ticket Owner

List of Technicians/ Administrator

Escalate Before Resolution Time – input Days, Hours

* + - 1. Delete Incident SLA
    1. Service SLAs
       1. List of Service SLAs – Name, Fulfillment Time, Associated Templates Qty, Associated Templates
       2. Add/Edit Service SLAs
          1. SLA Name
          2. Description
          3. Fulfilled Within (i.e., Fulfillment Time) – specify Days, Hours
          4. Escalation Levels

Level 1 Escalation

Escalate To – multiple add/delete; select from:

Ticket Owner

List of Technicians/ Administrator

Escalate Before Fulfillment Time – input Days, Hours

Level 2 Escalation

Escalate To – multiple add/delete; select from:

Ticket Owner

List of Technicians/ Administrator

Escalate Before Fulfillment Time – input Days, Hours

Level 3 Escalation

Escalate To – multiple add/delete; select from:

Ticket Owner

List of Technicians/ Administrator

Escalate Before Fulfillment Time – input Days, Hours

Level 4 Escalation

Escalate To – multiple add/delete; select from:

Ticket Owner

List of Technicians/ Administrator

Escalate Before Fulfillment Time – input Days, Hours

* + - 1. Delete Service SLAs
  1. Service Catalog
     1. Service Category
        1. Create New/Edit Service Category
           1. Name
           2. Description
           3. Icon
        2. Delete Service Category – only if not yet applied to service/ incident requests
        3. Arrange Service Category – allow manual arrangement
     2. Service Template
        1. Create New/ Edit Service Template
           1. Name
           2. Description
           3. Icon
           4. Service Template Status – Active/ Inactive
           5. Standard Interface/ Form Fields:

Technician’s View

Requester Name – Requester’s Name

Priority – drop-down menu

Mode – drop-down menu

Request Type – drop-down menu

Status – drop-down menu

Service Category – drop-down menu

Technician – drop-down menu

Subject – text box

Description – formattable text box

Email IDs to Notify – text box

Select Approvers – drop-down menu

User’s View

Requester Name – default: Requester’s Name (not editable)

Priority – drop-down menu (editable)

Mode – (not editable)

Request Type – (not editable)

Status – (not editable)

Service Category – (not editable)

Technician – (not editable)

Subject – text box (editable)

Description – formattable text box (editable)

Email IDs to Notify – text box (editable)

Select Approvers – drop-down menu (editable)

* + - * 1. Associate Support Groups – select multiple applicable Support Groups
        2. Approval Workflow

Add/ Edit/ Delete Approval Level – add up to 5 levels

Add/ Edit/ Delete Approvers per Level – select:

Reporting To – refer to User’s Reporting To

Department Head – refer to User’s Department Head

Specific Approvers – select from list of Users tagged as Service Request Approver

Approval Configurations

All Approvers must approve the Service Request / Apply first approval action – checkbox

Send approval notification automatically when a Service Request is raised

Assign technician only after Service Request full approval

* + - * 1. Associate SLA – select from SLA
      1. Delete Service Template – only if not yet applied to service requests
      2. Arrange Service Templates – allow manual arrangement within Service Categories
    1. Incident Template
       1. Create New/ Edit Incident Template
          1. Name
          2. Description
          3. Icon
          4. Incident Template Status – Active/ Inactive
          5. Standard Interface/ Form Fields:

Technician’s View

Requester Name – Requester’s Name

Priority – drop-down menu

Mode – drop-down menu

Request Type – drop-down menu

Status – drop-down menu

Service Category – drop-down menu

Technician – drop-down menu

Subject – text box

Description – formattable text box

Email IDs to Notify – text box

Select Approvers – drop-down menu

User’s View

Requester Name – default: Requester’s Name (not editable)

Priority – drop-down menu (editable)

Mode – (not editable)

Request Type – (not editable)

Status – (not editable)

Service Category – (not editable)

Technician – (not editable)

Subject – text box (editable)

Description – formattable text box (editable)

Email IDs to Notify – text box (editable)

* + - * 1. Associate Support Groups – select multiple applicable Support Groups
        2. Associate SLA – select from SLA
      1. Delete Service Template – only if not yet applied to service requests
      2. Arrange Service Templates – allow manual arrangement within Service Categories
  1. Technician Auto Assign (also refer to Business Rules on Technician Auto Assign)
     1. Exclude Technicians – to add, select from Users with Technician/ Administrator roles

1. General Business Rules
   1. Notification Rules
      1. Acknowledge requester by e-mail when a new request is received

|  |  |
| --- | --- |
| To | ${Requester\_Email} |
| Cc |
| Subject | IT HELPDESK: Your New Request ID ${Request\_ID} |
| Content | Dear ${Requester\_Name},  Your IT Helpdesk request has been created with the following details:  Request ID: **${Request\_ID}**  Status: ${Request\_Status}  Subject: ${Request\_Subject}  Description:  ${Request\_Description}  Login to your IT Helpdesk portal to view the details and progress of your request:  <https://ithelpdesk.aspacphils.com.ph>  *This mailbox is not monitored. Please do not reply to this message.*  **Keep Calm & Use the IT Help Desk!** |

* + 1. Acknowledge E-mail Cc users by e-mail when a new request is created.

|  |  |
| --- | --- |
| To | ${Emails\_To\_Notify} |
| Cc |  |
| Subject | IT HELPDESK: New Request ID ${Request\_ID} from ${Requester\_Name} |
| Content | *You are receiving this message because the Requester wanted you to get notified about this request.*  A new request was created with the following details:  Request ID: **${Request\_ID}**  Status: **${Request Status}**  Requester: **${Requester\_Name}**  Subject: ${Request\_Subject}  Description:  ${Request\_Description}  *This mailbox is not monitored. Please do not reply to this message.*  **Keep Calm & Use the IT Help Desk!** |

* + 1. Notify approver by email for approval action.

|  |  |
| --- | --- |
| To | ${Approver\_Email} |
| Cc |  |
| Subject | IT HELPDESK: Approval Required for Request ID ${Request\_ID} |
| Content | **Approval Required**  Your approval for this IT Helpdesk request is required in order to proceed with its processing.  Request ID: **${Request\_ID}**  Requester: **${Requester\_Name}**  Subject: ${Request\_Subject}  Description:  ${Request\_Description}  Login to your IT Helpdesk portal to approve this request:  <https://ithelpdesk.aspacphils.com.ph>  *This mailbox is not monitored. Please do not reply to this message.*  **Keep Calm & Use the IT Help Desk!** |

* + 1. Approval reminder email notification. [This is a daily (i.e., working days) recurring email notification at 8am as long as there are pending approvals.]

|  |  |
| --- | --- |
| To | ${Approver\_Email} |
| Cc |  |
| Subject | IT HELPDESK: Approval Reminder Notification |
| Content | **Reminder: Approval Required**  You have pending IT Helpdesk approvals which require immediate attention.  Login to your IT Helpdesk portal to view and approve the requests:  <https://ithelpdesk.aspacphils.com.ph>  *This mailbox is not monitored. Please do not reply to this message.*  **Keep Calm & Use the IT Help Desk!** |

* + 1. Notify requester by email when a request is fully approved or rejected.

|  |  |
| --- | --- |
| To | ${Requester\_Email} |
| Cc |  |
| Subject | IT HELPDESK: Request ID ${Request\_ID} has been ${Request\_Approval\_Status} |
| Content  🡪🡪🡪🡪🡪  *Include only if Rejected* | Dear ${Requester\_Name},  Your request has been updated with the following details:  Request ID: **${Request\_ID}**  Approval: **${Request\_Approval\_Status}**  Comment: ${Request\_Approval\_Comment}  Status: **${Request\_Status}**  Subject: ${Request\_Title}  Description:  ${Request\_Description}  Login to your IT Helpdesk portal to view the details of your request:  <https://ithelpdesk.aspacphils.com.ph>  *This mailbox is not monitored. Please do not reply to this message.*  **Keep Calm & Use the IT Help Desk!** |

* + 1. Notify requester by email when a clarification is raised by an approver.

|  |  |
| --- | --- |
| To | ${Requester\_Email} |
| Cc |  |
| Subject | IT HELPDESK: Clarification Raised for Request ID ${Request\_ID} |
| Content | Dear ${Requester\_Name},  A clarification request was raised by an Approver as part of the approval process for your request. Your response is needed for the approval process to continue.  Clarification Comments:  ${Clarification}  Request ID: **${Request\_ID}**  Status: **${Request\_Status}**  Subject: ${Request\_Title}  Description:  ${Request\_Description}  Login to your IT Helpdesk portal to respond to the clarification request:  <https://ithelpdesk.aspacphils.com.ph>  *This mailbox is not monitored. Please do not reply to this message.*  **Keep Calm & Use the IT Help Desk!** |

* + 1. Clarification reminder email notification. [This is a daily (i.e., working days) recurring email notification at 8am as long as there are pending clarifications.]

|  |  |
| --- | --- |
| To | ${Requester\_Email} |
| Cc |  |
| Subject | IT Helpdesk: Reminder for Pending Clarifications |
| Content | **Reminder: Pending Clarifications**  You have pending clarifications regarding your IT Helpdesk requests which require immediate attention.  Login to your IT Helpdesk portal to respond to the clarification requests:  <https://ithelpdesk.aspacphils.com.ph>  *This mailbox is not monitored. Please do not reply to this message.*  **Keep Calm & Use the IT Help Desk!** |

* + 1. Notify requester by email when a request is assigned to a technician.

|  |  |
| --- | --- |
| To | ${Requester\_Email} |
| Cc |  |
| Subject | IT HELPDESK: Request ID ${Request\_ID} has been assigned to ${Technician\_Name} |
| Content | Dear ${Requester\_Name},  Your IT Help Desk Request ID **${Request\_ID}** has been assigned to **${Technician\_Name}**.  Request ID: **${Request\_ID}**  Status: **${Request\_Status}**  Subject: ${Request\_Title}  Description:  ${Request\_Description}  Login to your IT Helpdesk portal to view the progress of your request:  <https://ithelpdesk.aspacphils.com.ph>  *This mailbox is not monitored. Please do not reply to this message.*  **Keep Calm & Use the IT Help Desk!** |

* + 1. Alert technician by email when a request is assigned.

|  |  |
| --- | --- |
| To | ${Technician\_Email} |
| Cc |  |
| Subject | IT HELPDESK: Request ID ${Request\_ID} has been assigned to ${Technician\_Name} |
| Content | Dear ${Technician\_Name},  A request has been assigned to you!  Request ID: **${Request\_ID}**  Status: **${Request\_Status}**  Due By Date: **${Due\_By\_Date}**  Subject: ${Request\_Title}  Description:  ${Request\_Description}  **Remember to resolve this request within the prescribed SLA!**  Login to your IT Helpdesk portal to view and update this request:  <https://ithelpdesk.aspacphils.com.ph>  *This mailbox is not monitored. Please do not reply to this message.*  **Keep Calm & Use the IT Help Desk!** |

* + 1. Notify technician by email for SLA escalation.

|  |  |
| --- | --- |
| To | ${Technician\_Email} |
| Cc |  |
| Subject | IT HELPDESK: SLA Escalation Warning! Request ID ${Request\_ID} is due on: ${Due\_By\_Date} |
| Content | **\*\*\* SLA Escalation Warning! \*\*\***  This is a warning notification for an IT Helpdesk request that will soon be overdue.  Request ID: **${Request\_ID}**  Status: **${Request\_Status}**  Due By Date: **${Due\_By\_Date}**  Technician: **${Technician\_Name}**  Subject: ${Request\_Title}  Description:  ${Request\_Description}  If you are not the assigned Technician, please remind him that this ticket will soon be overdue.  If the assigned Technician is not available, consider picking up this ticket if you are able to resolve it.  Login to your IT Helpdesk portal to view and update this request:  <https://ithelpdesk.aspacphils.com.ph>  *This mailbox is not monitored. Please do not reply to this message.*  **Keep Calm & Use the IT Help Desk!** |

* + 1. Notify requester by email when a request is resolved.

|  |  |
| --- | --- |
| To | ${Requester\_Email} |
| Cc |  |
| Subject | IT HELPDESK: Request ID ${Request\_ID} has been Resolved |
| Content | Dear ${Requester\_Name},  Your IT Helpdesk request has been resolved:  Request ID: **${Request\_ID}**  Status: **${Request\_Status}**  Subject: ${Request\_Subject}  Description:  ${Request\_Description}  Resolution:  ${Resolution\_Description}  As per ITIL standards, please click here to close the request:  ${Close\_Request\_Link}  Should you choose not to close this request within ten (10) days, you are waiving your right and are expressing your satisfaction to the resolution. Hence, your request will be automatically closed after ten (10) days.  *This mailbox is not monitored. Please do not reply to this message.*  **Keep Calm & Use the IT Help Desk!** |

* + 1. Acknowledge email Cc users when a request is resolved.

|  |  |
| --- | --- |
| To | ${Emails\_To\_Notify} |
| Cc |  |
| Subject | IT HELPDESK: Request ID ${Request\_ID} from ${Requester\_Name} has been Resolved |
| Content | *You are receiving this message because the Requester wanted you to get notified about this request.*  The following request has been resolved:  Request ID: **${Request\_ID}**  Status: **${Request\_Status}**  Requester: **${Requester\_Name}**  Subject: ${Request\_Subject}  Description:  ${Request\_Description}  Resolution:  ${Request\_Resolution}  This mailbox is not monitored. Please do not reply to this message.  **Keep Calm & Use the IT Help Desk!** |

* + 1. Acknowledge email Cc users when the request is closed.

|  |  |
| --- | --- |
| To | ${Emails\_To\_Notify} |
| Cc |  |
| Subject | IT HELPDESK: Request ID ${Request\_ID} from ${Requester\_Name} has been Closed |
| Content | *You are receiving this message because the Requester wanted you to get notified about this request.*  The following request has been closed:  Request ID: **${Request\_ID}**  Status: **${Request Status}**  Requester: **${Requester\_Name}**  Subject: ${Request\_Subject}  Description:  ${Request\_Description}  Resolution:  ${Request\_Resolution}  This mailbox is not monitored. Please do not reply to this message.  **Keep Calm & Use the IT Help Desk!** |

* 1. Closure Rules
     1. Mandatory Fields for closing requests
        1. Mode – Self-service Portal/ Phone Call/ Chat/ Email
        2. Service Category
        3. Work Log
        4. Technician
        5. Priority – Low/ Medium/ High
        6. Request Type – Incident/ Service
        7. Resolution
     2. Prompt a message to the Technician confirming the user’s acknowledgement to the resolution.
     3. Automated Close – close the request after 10 days if the requester has not manually closed the request.
     4. Close Requests Automatically if Approval is Rejected – even if the mandatory fields for closing requests are not fulfilled
  2. Technician Auto Assign
     1. Load Balancing – Assign new requests to the Technician with the least quantity of assigned requests within the request’s Associated Support Group.
     2. Execute when a service request is fully approved.
     3. Execute when an incident request is created.
     4. Apply to unassigned requests only.
  3. Security Settings
     1. Session Timeout – auto logout after 15 minutes of idle time
     2. Password Policy
        1. Minimum length 8
        2. Must contain uppercase and lowercase letters
        3. Must contain special characters or symbols
        4. Enable force password reset at first login

1. User Interfaces – refer to the current ManageEngine ServiceDesk Plus system
2. Work Activities & Resolutions
   1. Work Activities
      1. List of Worklogs
         1. Technician
         2. Start Time – Date, Time
         3. End Time – Date, Time
         4. Time Spent – Days, Hours, Minutes
         5. Description
      2. Adding/ Editing Worklogs
         1. Technician
         2. Start Time – Date, Time
         3. End Time – Date, Time
         4. Time Spent – Days, Hours, Minutes (auto-computed)
         5. Description
      3. Delete Worklogs
   2. Resolution
      1. Description
      2. Attach Files
      3. Upon save, change the request’s status to Resolved
3. History
   1. Date
   2. Time
   3. Activity
      1. Created
         1. By - Requester
      2. Approvals Initiated ( create service request )
         1. By – System
         2. Approval Stage
         3. Approvers
      3. Approval Reminder Sent ( Auto email notif )
         1. By – System
         2. Sent To – Approver, Approver Email
      4. Approval Rejected ( rejected )
         1. By - Approver
      5. Approved
         1. By - Approver
      6. Start Timer ( upon approval )
         1. By – System
         2. Status - Open
      7. Updated (any combination of the following) ( any changes in details )
         1. By – System or Technician
         2. Due By Date – auto-computed (for Incident –based on Created Time, for Service – based on Full Approval Time)
         3. Technician Change – from & to
         4. Status Change – from & to
         5. Timer Stopped – Date, Time
         6. Comments
      8. Worklog Added ( creation of worklog )
         1. By – Technician
         2. Technician
         3. Time Spent
      9. Resolved
         1. By – Technician
         2. Status Change – from & to (Resolved)
      10. Closed
          1. By – Requester or System
          2. Status Change – from & to (Closed)
4. Report Generator
   1. Fields
      1. Request ID
      2. Request Subject
      3. Request Description
      4. Request Type
      5. Request Status
      6. Approval Status
      7. Mode
      8. Requester
      9. Department
      10. Created Time
      11. Due By Time
      12. Resolved Time
      13. Priority
      14. Technician
      15. Service Category
      16. Request Template
      17. SLA
   2. Filters
      1. Request Type
      2. Request Status
      3. Approval Status
      4. Mode
      5. Requester
      6. Department
      7. Created Time – From/To
      8. Due By Time – From/To
      9. Resolved Time – From/To
      10. Priority
      11. Technician
      12. Service Category
      13. Request Template
      14. SLA
   3. Omni Search Box
   4. Export to Excel