Internal Help Desk
Bizagi Suite
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Your company is growing up and the technological resources management becomes more critical and complicated. Impacts generated by unavailability and malfunctioning are getting bigger, making assistance requests more frequent and complex.

Bizagi's Help Desk process template allows you to efficiently manage employees' incidents and requests in a single process, providing effective solutions in the lowest time. The process allows to improve employee productivity and to handle your activities with a continuous improvement concept: delivering control of case records in the knowledge base and requesting actions improvement. This way, every case becomes positive feedback that will reduce case opening and standardize the attention of frequent incidents.

Feel free to download it from our Free Process Central and to customize it according to your needs.
Objectives

General Objective

- Facilitate the Help Desk Case management for the IT department to maximize service levels through standardization and process control.

Specific Objectives

- Establish the information and the necessary flow of the process to minimize communication problems and ensure a quick resolution of cases.
- Sort and prioritize cases to schedule their attention by priority and not by their arrival order.
- Determine the necessary roles for the development of the process in order to properly escalate cases (if necessary) and thus ensure that the process flow has the minimum escalation cycles.

Scope

The Internal Help Desk process involves the main activities that must be carried out to solve cases related to the company’s technology. The process gives an organized flow from the case creation until its solution, including documentation in the knowledge base (KB) if required. The process allows the qualifying and scheduling of cases to reduce the impact generated by each one and enable easy control of the activities related to cases.

Below is a detailed description of how the process works.
Process Elements

Case Opening

Description

This phase covers the activities related to the case opening from the moment the employee creates the case until it is addressed by the Help Desk administrator.

Start

Description

The start event indicates that the Internal Help Desk process starts.

Open Case

Description

The user must enter the Open Case required information such as description, classification and the priority with which it is expected to be addressed.

Performers

Requester

Form

![Requester Information and Ticket Information](image-url)
On enter actions

- Rule to set the case creator, by default, as the requester.

On exit actions

- Rule to change the case status to Open.
- Rule to set report date as the current date.
- Rule to save the case number in an attribute to be shown in the forms.

**Element**

Description

This gateway enables the Close Case event so that the requester or any Help Desk Administrator can execute it if they consider it necessary at any time.

**Close Case**

Description

This event is available from the case creation to enable the Requester or any person with the role of Help Desk Administrator to close it at any moment. Reasons for closing the case must be included for those cases that are resolved before the normal process ends.

On exit actions

Rule to change the case status to Closed.

Form

![Form Image](image-url)
Notify Case Opening

Description
An e-mail is sent to the user to confirm the opening of the case and inform the ticket number associated.

On exit actions
- Rule to enable the variable “First” so that Help Desk Administrator is the first role assigned to the case.

On enter actions
- Rule to create the e-mail that must be sent in this task.

Script
Dear <Ticket.Requester.fullName>
Your case has been opened and the following ticket number has been associated for its follow-up:
TICKET NUMBER: <CaseNumber>
The case has been assigned and will be answered as quickly as possible.
Best Regards

Analysis and Resolution

Description
This phase covers the tasks that must be executed for resolving a case and notifying its solution to the requester. If improvement suggestions were found, they are sent.

Analyze and Resolve

Description
The case is initially reviewed by a Help Desk Agent who determines if the information given by the requester about the case is enough to resolve it or if the case should be escalated to another area or person. Once this task is received by the person who can
resolve it (either the Help Desk Agent or someone to whom the case has been escalated) the solution procedure must be entered so it can be notified.

The performer of the activity must also specify the Closure Type. It can be Immediate if the solution is simple, or it can be Monitoring if it requires a response to the solution proposed, from the requester. If the case requires documentation it can be chosen as well.

Optionally, if during the case resolution, improvement opportunities of any aspect in any area were found, they can be notified. The notification with the improvement suggestion will be sent to the person in charge so that he/she can take it into account for future changes.

Performers

Case Resolver, Help Desk Agent
Form

On enter actions

- Rule to set to the Assignee attribute to the person who is currently working on the case.
- Rule to clean the fields that have been previously filled so that they can be used again.

On exit actions

- Rule to update the Case History Grid between the case resolver and the requester.
- Rule to update the Case History Grid between the different people to whom the case has been assigned or escalated for its resolution.
- Rule to update the General Information Grid where the case history is shown.
• Rule to update the Assignee attribute if the case was escalated. This rule is useful to assign to the Review and Analyze task, the person to whom the case was escalated.
• Rule to cancel the control variable that determines if the case must be re-analyzed either because the requester sent the requested information or because the given solution did not work.
• Rule to cancel the control variable of case assignment to the Help Desk Administrator so that it can be escalated.

◇ Escalation?

Description
This gateway evaluates if the Escalate option was chosen in the “Analyze and Resolve” activity

Gates

• YES: If the case was escalated, it must be reviewed and analyzed by the person to whom it was escalated.
• NO: The process continues to the “Information Requested” gateway.

◇ Information Requested?

Description
This gateway evaluates if the person resolving the case needs further information from the requester to resolve the case.

Gates

• YES: If the person resolving the case requires more information, the next task will be notify the requester to send the required information
• NO: If more information is not required, the process will proceed to notify the requester the solution found for the case.
Send Information Request

Description

An e-mail is sent to the requester to ask for more detailed information about the problem to enable the resolver to analyze and solve the case.

On enter actions

- Rule to create the e-mail that must be sent in this task.
- Rule to change the case status to “Waiting for information”.

Script

Dear <Ticket.Requester.fullName>

The information provided for the ticket number <CaseNumber> is not enough to resolve the case. Please send us the following information:

<Ticket.InformationRequest>
<Ticket.InformationFile>

Remember that the early response to this request will be reflected in a faster resolution.

Best Regards

Element

Description

This gateway enables two paths. The first path controls the maximum time allowed for the user to respond to the solution received. The second path enables an Event for the user to report if the solution has not been satisfactory. Whichever path is executed first the other one will be cancelled.
**Wait Report**

**Description**

This Intermediate Timer Event controls the maximum time that the requester has to send the solution report. If he/she exceeds the maximum time, the process will continue and notify the closing of the case.

**Send Case Closing Notification**

**Description**

An e-mail is sent to the requester to notify them that the case has been closed due to the ineffective solution report not being sent.

**On enter actions**

- Rule to create the e-mail that must be sent in this task.

**Script**

Dear <Ticket.Requester.fullName>

We have waited for your response concerning our proposed solution. Since we have not heard from you, we assume that the solution provided worked and the case has been resolved. We will now proceed to close it.

If this solution is not satisfactory, but you forgot to report it, use the associated ticket number to open a new case by entering it in the description of case opening.

We are pleased to assist your request.

Best Regards
**Send Requested Information**

Description

The requester must enter the information that has been requested by the person who is currently works on the case resolution.

Performers

Requester

Form

![Form Image]

On exit actions

- Rule to enable the control variable that determines if the case must be re-analyzed. This rule is useful to assign the Review and Analyze task to the person who requested further information.
- Rule to change the case status to Open.
- Rule to update the General Information Grid where the Case History is shown.

**Notify Information Was Sent**

Description

An e-mail is sent to the person who is working on the case resolution to notify that the requester has sent the requested information.
On enter actions

- Rule to create the e-mail that must be sent in this task.

Script

Dear <Ticket.TicketAssignee.fullName>

The requester associated with the ticket <CaseNumber> has sent you the requested information:

<Ticket.Information>
<Ticket.InformationFile>

Please review this information and assist this case as soon as possible.

Best Regards

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Send Resolution

Description

Once a case solution has been found, either a procedure or a specific answer, an email is sent to the requester. Depending on the closure type selected (Immediate or with Monitoring) it also notifies the case closing (for immediate closing) or a maximum time to report the results of this solution so the case won’t be closed if these are not satisfactory (for monitoring closing).

On enter actions

- Rule to create the e-mail that must be sent in this task.

Script

Script 1 Immediate Closing

Dear <Ticket.Requester.fullName>

We are pleased to inform you that we have found the following solution to your ticket <CaseNumber>:
We will proceed to close the case. We are pleased to assist your case.

Best Regards

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**Script 2 Monitoring Closing**

Dear <Ticket.Requester.fullName>

We are pleased to inform you we have found the following solution to your ticket <CaseNumber>:

<Ticket.Solution>

<Ticket.SolutionFile>

It is important for us to know if this solution is satisfactory to you and if it fully resolves your case. If your problem is not resolved, please notify us as soon as possible.

We are pleased to assist your case.

Advising:

If we do not receive a timely report from you, we will proceed to close the case.

Best Regards.

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**Closure Type**

Description

This gateway evaluates the closure type of the case.

Gates

- Immediate: If the closure type of the case is immediate the case status will change to closed.
- Monitoring: If the closure type of the case is with monitoring, it will wait a determined time for validating that the solution given has the expected results.
Information sent on time?

Description

This gate enables two paths. The first path is a Timer Event which will wait for the Requester to send the information required. The second path is an activity assigned to the Requester to fill-in the information. Whichever path is executed first will cancel the other one.

Report Solution did not work

Description

If the given solution did not work, this must be reported so that the case can be resumed by the person who suggested the solution.

On exit actions

- Rule to update the information flow grid between the case resolver and the requester.
- Rule to enable the control variable that determines if the case must be re-analyzed. This rule is useful to assign the Review and Analyze task to the person who requested the information.
- Rule to change the case status to Open.

Form

![Image of form](image-url)
**Send Notification**

Description

An e-mail is sent to the person who proposed the case solution to notify them that such solution has not had the expected results and its resolution must be resumed.

Script

Dear <Ticket.TicketAssignee.fullName>

The requester associated to the ticket <CaseNumber> has reported that the solution given by you has not resolved the case. The report is as follow:

<Ticket.ReportDescription>

<Ticket.ReportFile>

Please assist this case as soon as possible

Best Regards

**Wait For Information**

Description

This Timer Intermediate Event controls the maximum time the requester has to send the requested information. If the time is exceeded, the timer will continue to the next task and notify the case closing.

**Send Case Closing Notification**

Description

An e-mail is sent to the requester informing that the case has been closed for not sending the requested information on time.
On enter actions

- Rule to create the e-mail that must be sent in this task.

Script

Dear <Ticket.Requester.fullName>

We have not received an answer to our request regarding your Ticket. For this reason we will proceed to close this case.

Best Regards

💡 Suggest Improvement?

Description

This gateway evaluates if an improvement suggestion must be sent.

Gates:

- YES: If an improvement suggestion is to be sent, it proceeds to generate a mail with the description of the suggestion.
- NO: If an improvement suggestion is not to be sent, the process continues to the task “Record in KB”

On enter actions

- Rule to set the resolved date as the current date.
- Rule to change the case status to Closed.

📧 Send Improvement Suggestion

Description

An e-mail is sent with the description of the improvement suggestion so that it can be analyzed and implemented.
On enter actions

- Rule to create the e-mail that must be sent in this task.

Script

Dear <Ticket.SendTo.fullName>

When we worked in the ticket <CaseNumber> solution, we found there exists an improvement opportunity in the following aspects:

<Ticket.ImprovementSuggestion>

<Ticket.ImporvementFile>

We hope this report to be useful to your area.

Best Regards

Documentation and Closing

Description

In this phase the case is documented in the Knowledge Base if required. Finally the case is closed.

Review and Record in KB

Description

The Help Desk Agent who reviewed the case initially, reviews its history, evaluate its development, and, if the person who resolved the case considered that it should be recorded in the knowledge base (KB), it must be documented leaving here a record of this action.

Performers

Help Desk Agent
Form

On enter actions
- Rule to calculate the total time spent in the case resolution.

On exit actions
- Rule to validate if the case was documented if required.
Performers

Help Desk Agent (Role)
Person who receives and manages cases.

Case Resolver (Role)
Person who is able to assist cases that Help Desk Agents cannot resolve.

Requester (Role)
Employee who opens the case.