































bizagi

Bizagi Help Desk

Bizagi Modeler

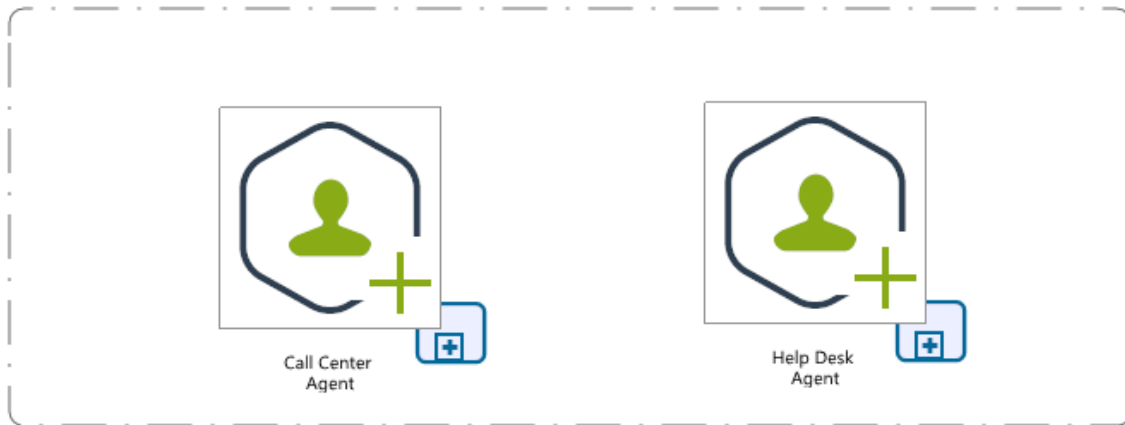
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1 Stakeholders (Stakeholder documentation)

Stakeholders



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1.1 Help Desk Agent

Description

Stakeholder who receives and manages cases.

Process

[Help Desk Agent \(Stakeholder documentation\) - Main Process](#)

1.2 Call Center Agent

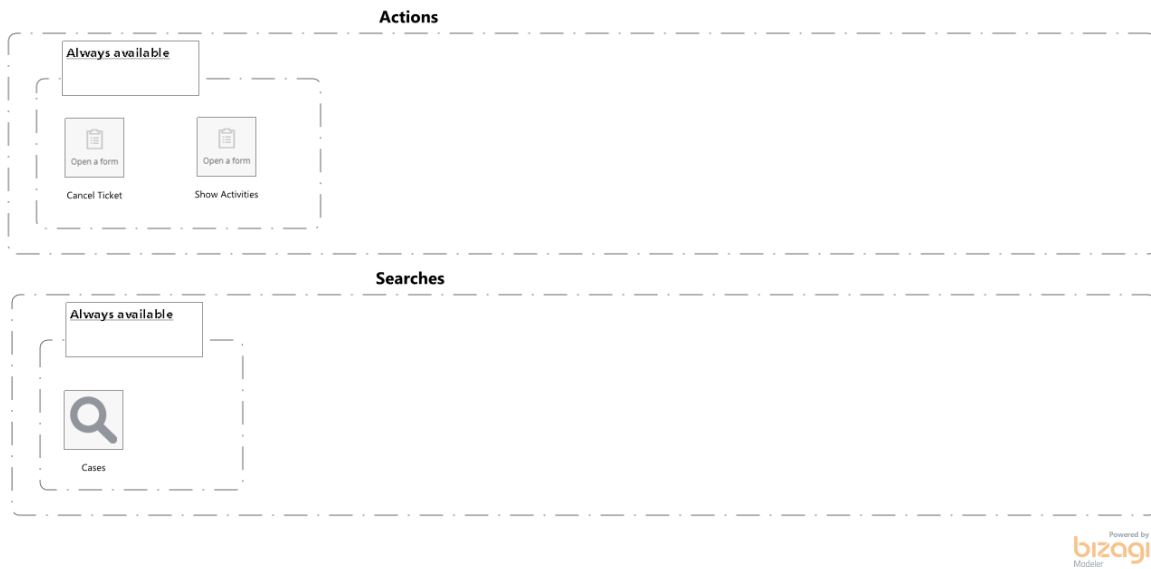
Description

Stakeholder who receives calls, creates and cancels cases, and updates the information of a customer.

Process

[Call Center Agent \(Stakeholder documentation\) - Main Process](#)

2 Call Center Agent (Stakeholder documentation)



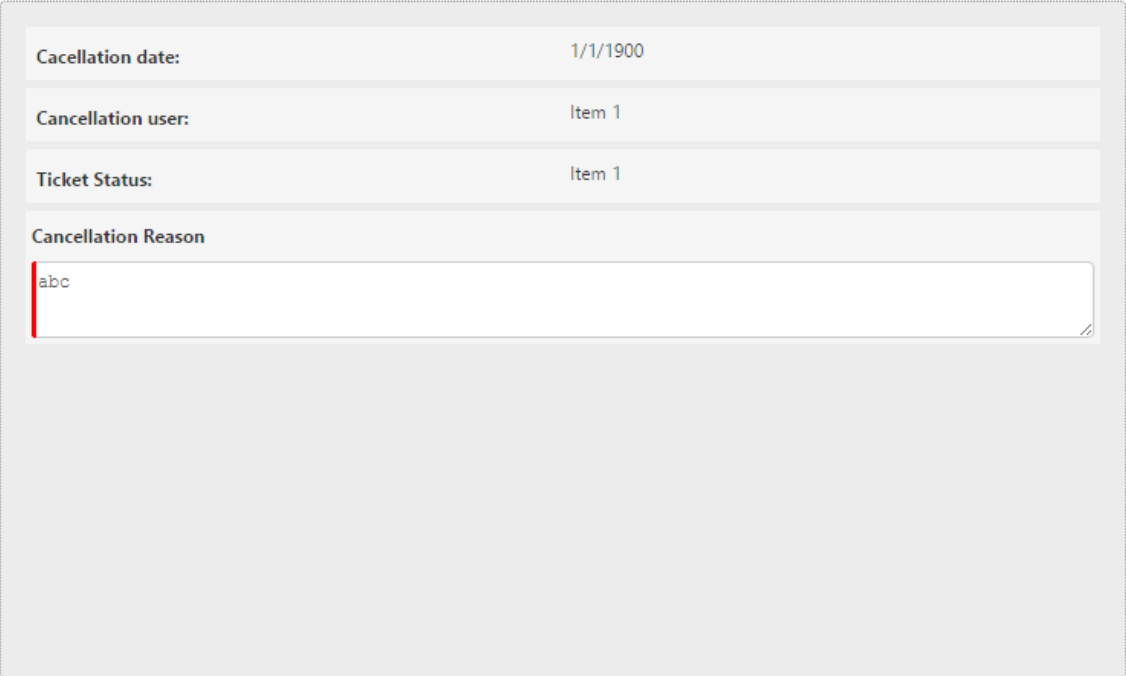
2.1 Actions

2.1.1 Cancel Ticket

Description

Cancel the ticket giving a reason for its cancellation

Associated form



The screenshot shows a form titled "Cancel Ticket" with the following fields:

Cancellation date:	1/1/1900
Cancellation user:	Item 1
Ticket Status:	Item 1
Cancellation Reason	<input type="text" value="abc"/>

Applied to all Stakeholders

No

Can be launched from:

Me;Processes

Is visible when:

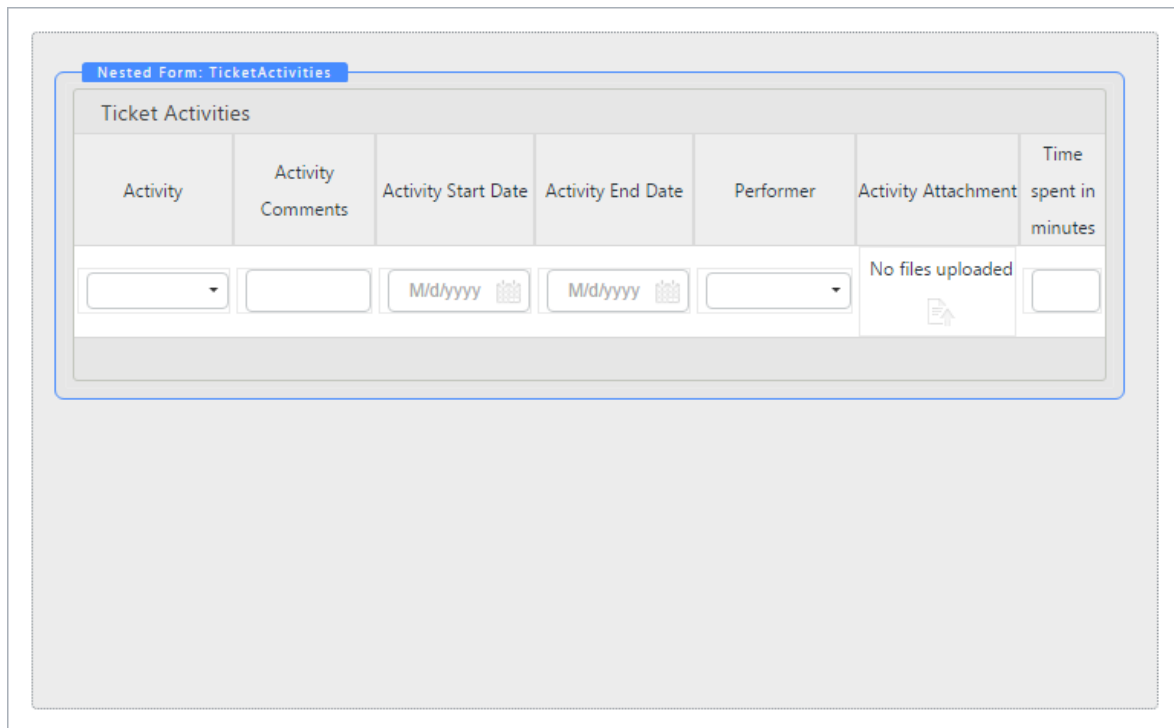
(TicketStatus != 'Resolved') AND (TicketStatus != 'Closed')

2.1.2 Show Activities

Description

Displays the history of all activities recorded in the case.

Associated form



Activity	Activity Comments	Activity Start Date	Activity End Date	Performer	Activity Attachment	Time spent in minutes
<input type="text"/>	<input type="text"/>	<input type="text" value="M/d/yyyy"/>	<input type="text" value="M/d/yyyy"/>	<input type="text"/>	<input type="text" value="No files uploaded"/>	<input type="text"/>

Applied to all Stakeholders

Yes

Can be launched from:

Me

2.2 Actions

2.2.1 Cases

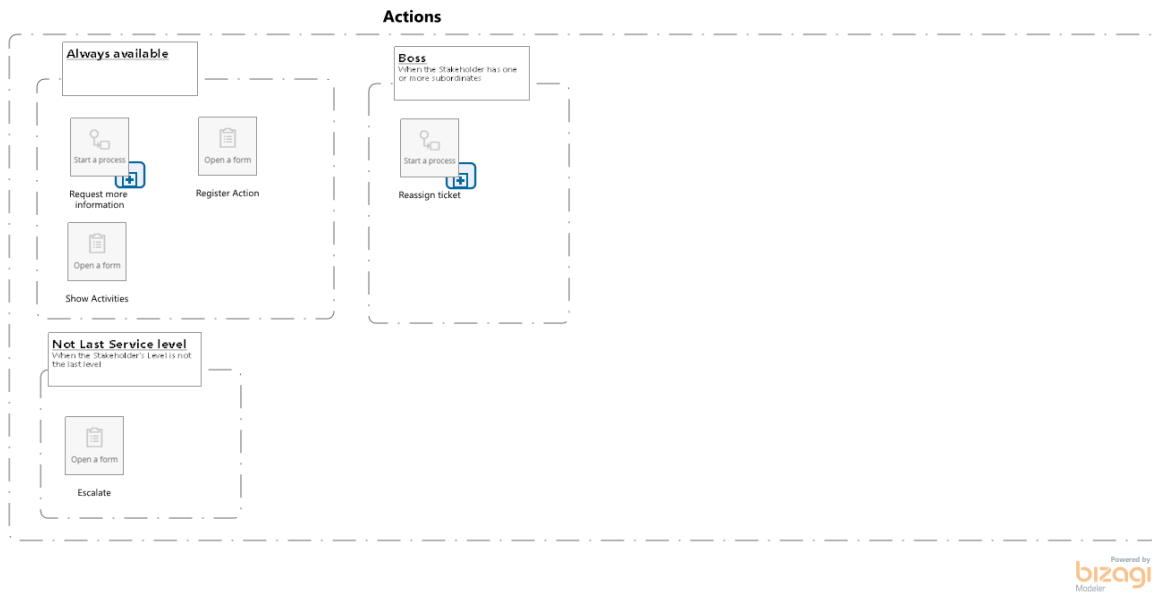
Description

Displays all the cases registered in the Bizagi Help Desk application

Search form

Ticket Number:	<input type="text" value="abc"/>	<input type="checkbox"/>
ID Type:	<input type="text" value="Please select.."/>	<input type="checkbox"/>
ID Number:	<input type="text" value="abc"/>	<input type="checkbox"/>
First Name:	<input type="text" value="abc"/>	<input type="checkbox"/>
Last Name:	<input type="text" value="abc"/>	<input type="checkbox"/>
Ticket Assignee:	<input type="text" value="Please select.."/>	<input type="checkbox"/>
<div><div>Opening Date From:</div><div><input type="text" value="M/d/yyyy"/></div><div><input type="checkbox"/></div><div>To:</div><div><input type="text" value="M/d/yyyy"/></div><div><input type="checkbox"/></div></div>		

3 Help Desk Agent (Stakeholder documentation)



3.1 Actions

3.1.1 Request more information

Description

Action to request more information from the customer who owns the case.

Process

[Request More Information - Request More Information](#)

Is a batch action?

No

Applied to all Stakeholders?

No

Can be launched from

Processess

3.1.2 Reassign ticket

Description

Action to allow the Boss to reallocate the current case to another employee including themself.

Process

[Ticket Reassignment - Ticket Reassignment](#)

Is a batch action?

No

Applied to all Stakeholders?

No

Can be launched from

Me

Is visible when:



(TicketStatus != 'Resolved') AND (TicketStatus != 'Closed')

3.1.3 Register Action

Description

Action to register an activity, solve the case or close it.

Associated form

Activity Comments <input type="text" value="abc"/>		Performer: Item 1
Activity Attachment: No files uploaded 		Activity: <input type="text"/>
		Start Date: 1/1/1900
		End Date: <input type="text" value="M/d/yyyy"/> 
		Time Spent (in minutes): 123
Ticket: Item 1		
Close Case: Yes		

Applied to all Stakeholders

No

Can be launched from:




Processes

3.1.4 Show Activities

Associated form

Nested Form: TicketActivities

Ticket Activities

Activity	Activity Comments	Activity Start Date	Activity End Date	Performer	Activity Attachment	Time spent in minutes
<input type="text"/>	<input type="text"/>	<input type="text" value="M/d/yyyy"/> 	<input type="text" value="M/d/yyyy"/> 	<input type="text"/>	No files uploaded 	<input type="text"/>

Applied to all Stakeholders

Yes

Can be launched from:

Me

3.1.5 Escalate

Associated form

Escalation Date:	1/1/1900
Activity:	Item 1
Escalation Reasons	Escalate to
<input type="text" value="abc"/>	<input type="text"/>
Escalation Attachment:	No files uploaded
Activity Start Date:	1/1/1900
Time Spent:	123

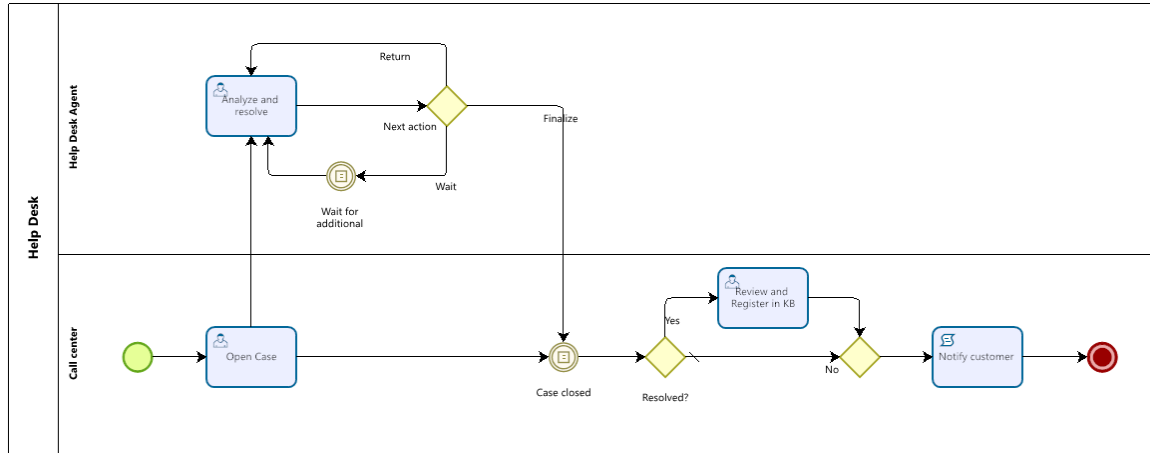
Applied to all Stakeholders

No

Can be launched from:

Processes

4 Help Desk



4.1 Help Desk

Description

The process starts with a customer making a call, the call is received by the Call Center Agent. The agent searches the information of the user and registers the information given by the customer. Once the case is opened, Bizagi allocates the case to the Help Desk Agent.

The assigned Help Desk Agent analyzes the case and determines if the information given by the customer is enough to resolve the case; when the information is enough, the agent proceeds to close or resolve the case, registers an activity related to the case or escalates it to a higher Services Level. Otherwise, the agent requests more information to the customer, the case waits for the information until the expiration of the time defined by the SLA of the case.

When the case is resolved, the agent who resolved the case reviews the closure information and determines if the case should be registered in the Knowledge Base. Once the Agent completes this activity, the case in Bizagi is closed.

4.1.1 Process Elements

4.1.1.1 Resolved?

Description

This gateway evaluates if the case has been closed or resolved.

YES: If the assigned user resolved the case.

NO: If the assigned user closed the case or a Call Center Agent cancelled it.

Actions

Type	Description
On Enter	<u>On Ticket Cancel</u> If the ticket was cancelled, registers the cancellation in the historical of activities

Gates

No

Condition Type

Default

Yes

Condition

(Ticket.TicketStatus = 'Resolved')

4.1.1.2 *Wait for additional information*

Description

This event is activated when the Help Desk Agent currently assigned requests more information of the case

Condition

(Ticket.TicketStatus = 'On Hold') AND (Ticket.continuewiththecase = true)

4.1.1.3 *Open Case*

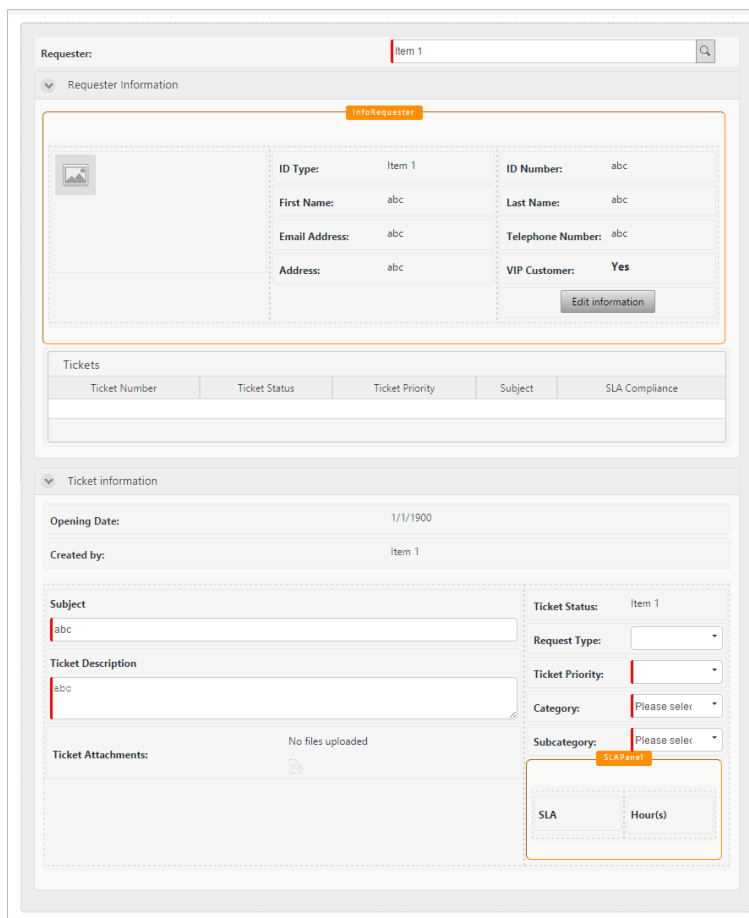
Description

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

Performers

Call Center Agent

Form



The screenshot displays the 'Open Case' form in the Bizagi system. At the top, there is a 'Requester' field with a dropdown menu showing 'Item 1'. Below this is a section titled 'Requester Information' with a sub-header 'infoRequester'. This section contains a grid of fields for personal information: ID Type (Item 1), ID Number (abc), First Name (abc), Last Name (abc), Email Address (abc), Telephone Number (abc), Address (abc), and VIP Customer (Yes). An 'Edit information' button is located at the bottom right of this grid. Below the requester information is a 'Tickets' table with columns for Ticket Number, Ticket Status, Ticket Priority, Subject, and SLA Compliance. The table is currently empty. Underneath the table is a section titled 'Ticket information'. This section includes fields for Opening Date (1/1/1900) and Created by (Item 1). Below these are input fields for Subject (abc) and Ticket Description (abc). To the right of these fields are dropdown menus for Ticket Status (Item 1), Request Type, Ticket Priority, Category (Please select), and Subcategory (Please select). At the bottom right, there is a section for SLA and Hour(s) with a dropdown menu for SLA and a text input for Hour(s). The form is designed with a clean, modern interface using light gray and white colors with orange accents for buttons and headers.

Notify assignment

No

Actions

Type	Description
On Enter	<p><u>Initializes Data:</u></p> <p>Initialize the values fourth attributes Opening Date, Ticket Status, and Created by</p>
On Exit	<p><u>Complete Data:</u></p> <p>Adds the creation of the case to the Historical of activities</p>

Form behaviours

Description
As soon as the Call Center Agent selects the user who requests the Ticket, the Ticket information will be available

4.1.1.4 Exclusive Gateway

Actions

Type	Description
On Enter	<p><u>Set Closed Case</u></p> <p>If the case was closed, registers the information to be sent to the user about this action</p>

Gates

Notify customer

4.1.1.5 Review and Register in KB

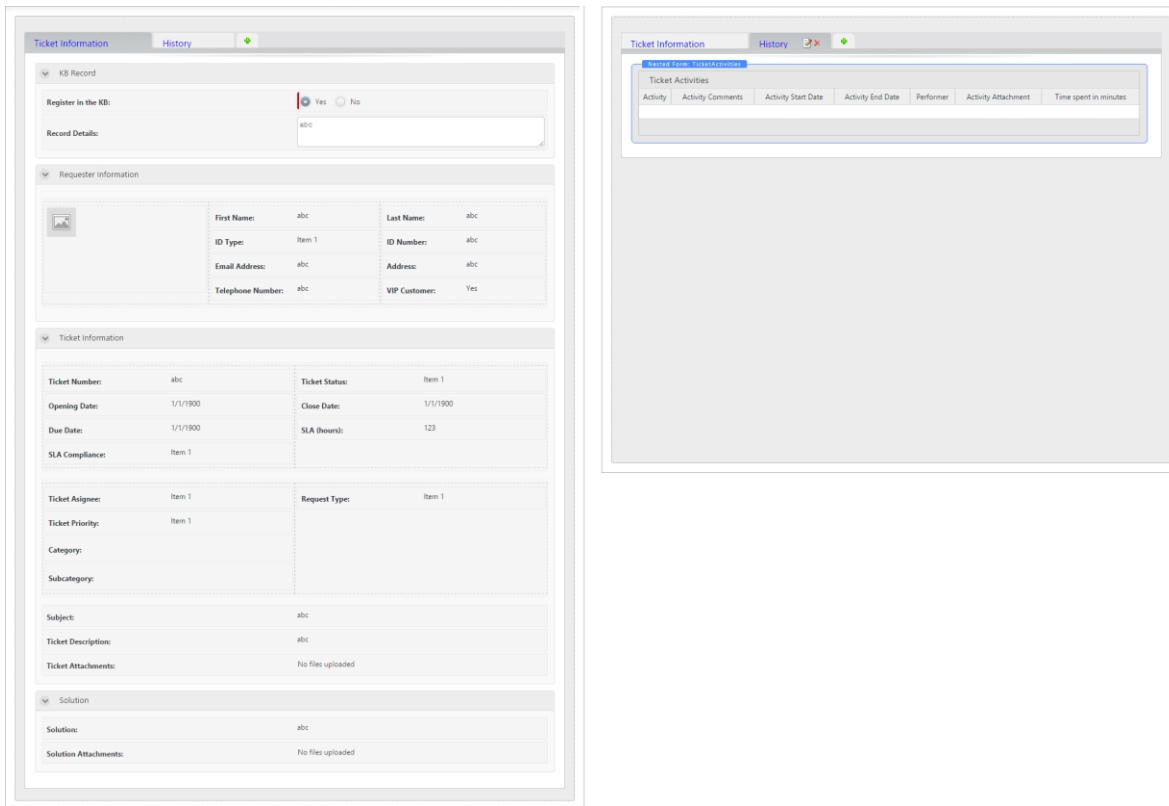
Description

The Help Desk Agent who solved the case, reviews its history, evaluate its development, and, if they consider 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



Ticket Information | History

KB Record

Register in the KB: ☒ Yes ☐ No

Record Details:

Requester Information

First Name: Last Name:
 ID Type: ID Number:
 Email Address: Address:
 Telephone Number: VIP Customer: ☒

Ticket Information

Ticket Number: Ticket Status:
 Opening Date: Close Date:
 Due Date: SLA (hours):
 SLA Compliance:

Ticket Assignee: Request Type:
 Ticket Priority:
 Category:
 Subcategory:
 Subject:
 Ticket Description:
 Ticket Attachments:

Solution

Solution:
 Solution Attachments:

Ticket Activities

Activity	Activity Comments	Activity Start Date	Activity End Date	Performer	Activity Attachment	Time spent in minutes

Notify assignment

No

Actions

Type	Description
On Enter	<p><u>Finish Ticket</u></p> <p>This expression performs the following actions:</p> <ul style="list-style-type: none"> Copies the last active information, to the solution fields <ul style="list-style-type: none"> Calculates de SLA compliance

4.1.1.6 Notify customer

Description

Once a case solution has been found or the case has been closed, Bizagi sends an e-mail to the requester.

Script

-- Script1: Case Resolved

Dear <Ticket.Requester.FirstName> <Ticket.Requester.LastName>

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

<Ticket.Solution>

<Ticket.SolutionAttachments>

We will proceed to close the case. If your problem is not resolved, please notify us as soon as possible.

We are pleased to assist your case.

Best regards.

Bizagi Help Desk team.

-- Script2: Case Closed

Dear <Ticket.Requester.FirstName> <Ticket.Requester.LastName>

The ticket <CaseNumber> had to be closed due to the following reasons:

<Ticket.CaseCancellation.CancellationReason>

The cancellation was performed by <Ticket.CaseCancellation.Cancellationuser.fullName>

We are pleased to assist your case.

Best regards.

On exit actions

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

4.1.1.7 Next action

Description

This gateway evaluates the next action to be taken by the process

Gateway:

Return: If the assigned user scaled the ticket or he/she registered an activity.

Finalize: If the case has been closed or resolved.

Wait: If the case status is On Hold, in other words, the assigned user is waiting for more information.

Actions

Type	Description
On Enter	<p><u>Register Last Activity</u></p> <p>Registers the last activity in the history of activities and changes the status of the case depending on the activity type.</p>

Gates

Return

Condition

(Ticket.Continuewiththecase = TRUE) AND (Ticket.TicketStatus != 'On Hold')

Wait

Condition

(Ticket.TicketStatus = 'On Hold')

Finalize

Condition

(Ticket.Continuewiththecase = FALSE) AND (Ticket.TicketStatus != 'On Hold')

4.1.1.8 Case closed

Description

This event is activated when the Help Desk Agent resolves or closes the case. Furthermore, it is also activated when the Call Center Agent cancels the case.

Condition

(Ticket.TicketStatus == 'Resolved') OR (Ticket.TicketStatus == 'Closed')

4.1.1.9 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 service level. 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 can also register Activities oriented to solve the case. When the case is resolved, if the case requires documentation it can be chosen as well.


Performers

Help Desk Agent

Form

Subject abc		Due Date: 1/1/1900	
Opening Date 1/1/1900		Expires:	Label
		SLA (hours): 123	

Ticket Information		Ticket Activities		Requested by	
Ticket Number: abc		Name: abc abc		abc	
Created by: Item 1				Recent Tickets	
Ticket Description: abc				    	
Ticket Attachments: No files uploaded				Ticket Priority Item 1	
				Ticket Status Item 1	
				Category:	
				Subcategory:	

Ticket Information		Ticket Activities				
Nested Form: TicketActivities						
Ticket Activities						
Activity	Activity Comments	Activity Start Date	Activity End Date	Performer	Activity Attachment	Time spent in minutes
<input type="text"/>						

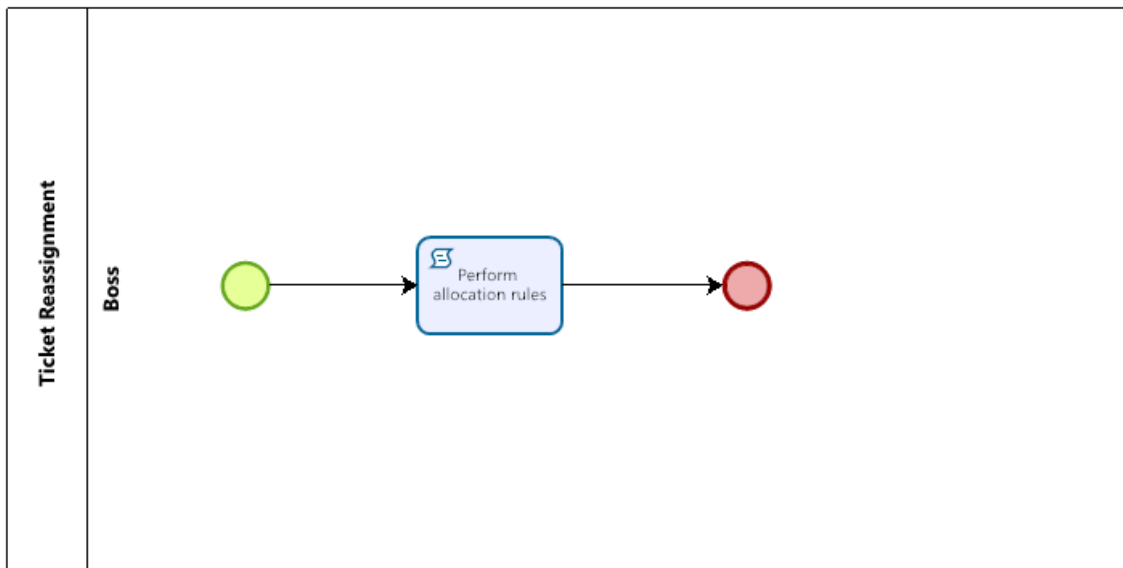
Notify assignment

No

Actions

Type	Description
On Enter	<u>Set Case Duration</u> Sets the case and activity duration, furthermore, sets the assigned user to the ticket in order to let the ticket to be displayed in the assigned user's Me menu.

5 Ticket Reassignment



5.1 Ticket Reassignment

Description

This process allows the Boss to reallocate the current case to another employee including himself/herself.

5.1.1 Process Elements

5.1.1.1 *Perform allocation rules*

On exit actions

- **Add Activity Action**

Registers the reassignment in the historical of activities

- **Reallocate Activity**

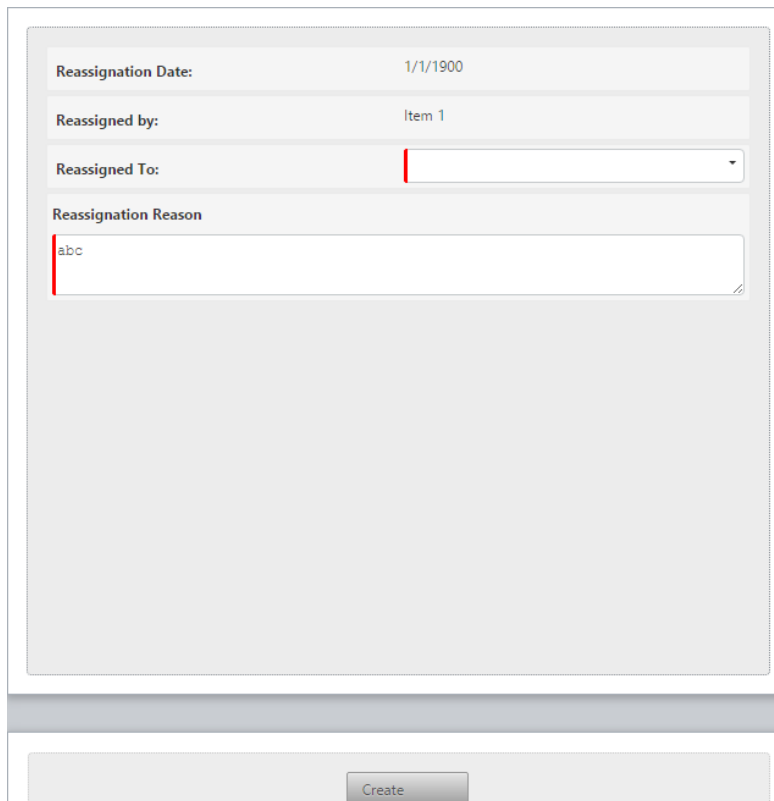
Change the allocated user to the user previously selected

- **Add Assignment**

Registers the assignment to the new user in the historical of activities

5.1.1.2 *Start Event*

Start form

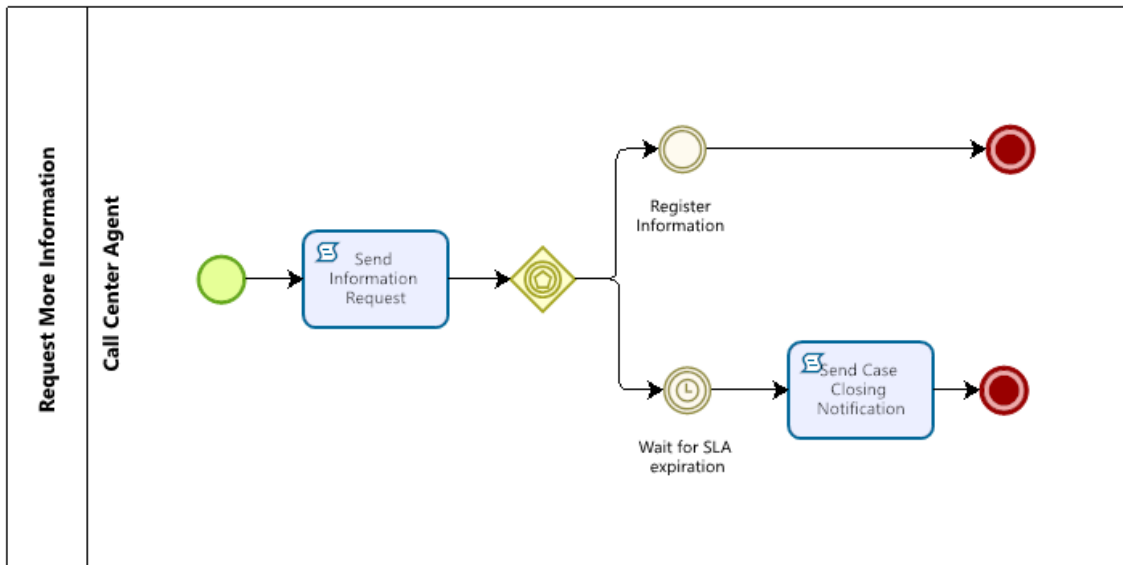


The screenshot shows a web form for ticket reassignment. It contains the following fields:

- Reassignment Date:** A text field with the value "1/1/1900".
- Reassigned by:** A text field with the value "Item 1".
- Reassigned To:** A dropdown menu with a red border and a downward arrow.
- Reassignment Reason:** A text area with the value "abc".

At the bottom of the form is a "Create" button.

6 Request More Information



6.1 Request More Information

Description

Request More information process is launched when the case information gave by the user was not enough to resolve the case, this process sends the request of more information and waits until the expiration of the time defined by the SLA of the case. Do not start cases of this process because it needs information from Help Desk process


6.1.1 Process Elements

6.1.1.1 Register Information Sent

Description

The Call Center Agent must enter the information that has been requested by the person who is working on the case resolution.

Form:

Information Requested At:	1/1/1900
Information Requested by:	Item 1
Information Received by:	Item 1
Information Date:	1/1/1900
Information	<input type="text" value="abc"/>
Information Attachment:	No files uploaded 
Ticket:	Item 1

Allocation

Condition	Description
UserId == InformationRequested.InformationRecievedby.associatedUser.idUser	The assigned user is the Help Desk Agent who created the case

Actions

Type	Description
On Exit	<p><u>Set Status</u></p> <p>Register the reception of more information in the Historical of actions and let the Help Desk process know that it can continue.</p>

6.1.1.2 *Send Information Request*

Description

Bizagi sends an e-mail to the requester asking for more detailed information about the problem to let the resolver analyze and solve the case.

On exit actions

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

6.1.1.3 *Event-based Gateway*

Instantiate

False

Actions

Type	Description
On Enter	<p><u>Set Start Date</u></p> <p>Register the request of more information in the Historical of actions.</p>

6.1.1.4 *Wait for SLA expiration*

Description

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

Actions

Type	Description
On Enter	<p><u>Set Timer Wait</u></p> <p>Set the date in which, the event will be executed (Timeout).</p>

On Exit	<p><u>Information Not Sent</u></p> <p>Registers that the case has been closed due to the tardiness in the sending of the information</p>
---------	---

6.1.1.5 *Start Event*

Start form

Ticket:
Item 1

Requester

abc

abc

Email Address:
abc

Date:
1/1/1900

Information Request

abc

Attachment:
No files uploaded

Create

6.1.1.6 *Send Case Closing Notification*

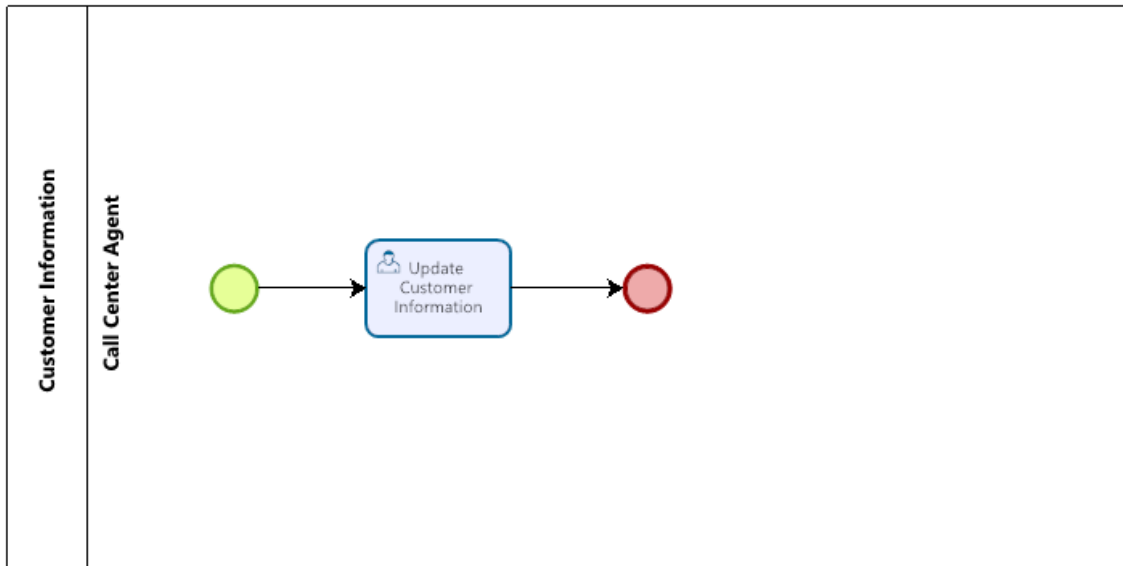
Description

Bizagi sends an e-mail to the requester informing that the case has been closed because they don't send the requested information on time.

On exit actions

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

7 Customer Information



7.1 Customer Information

Description

Customer Information is a process in which the Call Center Agent can change the Customer Information when the customer requires to update their information.

7.1.1 Process Elements

7.1.1.1 *Update Customer Information*

Description

The Call Center Agent searches the Customer and updates his/her main information.

Performers

Call Center Agent

8 Resources

8.1 Call Center Agent (Entity)

Description

The call center agent is the stakeholder who interacts with the requester in order to start or cancel cases; they can also update the information of a requester and give the information of any case regardless its state.

8.2 Help Desk Agent (Entity)

Description

The help desk agent is the stakeholder who can resolve an assigned case; a help desk agent may be the boss of one or more agents, and they belong to a determined Service Level