Sapphire IMS

SapphireIMS 5.0 Service Desk Feature Specification v1.7

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Overview

SapphireIMS Service Desk is an ITIL v2011 certified, enterprise grade, comprehensive IT Service Management Suite. It helps business enterprises and service providers to manage service operations and ensure guaranteed service delivery to its customers as per the service level goals set. SapphireIMS Service Desk enables businesses to excel in customer service, perception, and satisfaction.
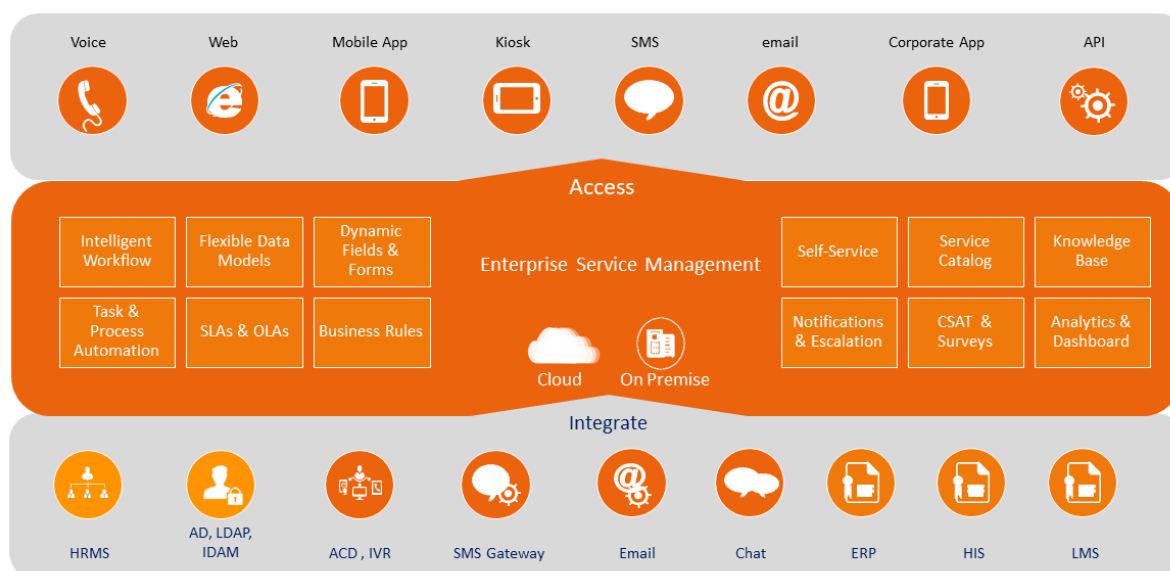
Highlights

- ✓ Manage ITIL compliant Incident, Problem, Change and Request Fulfilment processes
- ✓ Capture complete request information in a simplified manner by associating request with Location, Department, Service, Category, Subcategory etc.
- ✓ Implement organization service support processes through service desk forms and customizable workflow
- ✓ Implement context sensitive, multi-level approval processes through built-in approval mechanisms in the workflow
- ✓ Support for context sensitive fields based on nature of request/incident
- ✓ Powerful SLA engine to keep a watch of service operations against the committed SLA's
- ✓ Multi-level (Pre-violation(s), Post-violation(s)) escalations and notifications upon SLA breach
- ✓ Define SLA and Measure it through off-the-shelf SLA reports
- ✓ Ability to add attachments in a request/incident with File Type and Size Restriction
- ✓ Ability to view PDF, Image, Audio and Video file attachments in the request/incident details UI without downloading the attachments
- ✓ Support for multiple sources to submit tickets: Web, Email, SMS, Telephone (Helpdesk)
- ✓ Automatically convert Email/SMS to request/incident
- ✓ Spam Filter Rules in Email to Record Conversion
- ✓ Email Command in Email to Record Conversion
- ✓ Role based Access Control at a field level ensures sharing of right information to right stakeholders (Editable, Read Only, Mandatory, Hidden)
- ✓ Auto functional escalation escalates open incidents to functional specialists in a time-bound manner
- ✓ Hierarchical escalation aids in escalation to appropriate managerial stakeholders
- ✓ Facility to broadcast critical information through Announcements
- ✓ SOP Compliance to track the Compliance Status of the "Standard Operating Procedures (SOP)" for Predefined Scheduled Activities (e.g. Preventive Maintenance, Scheduled Maintenance, Periodic System Checks etc.) across different Locations
- ✓ Integration with Asset Management and Business Service Monitoring Modules
- ✓ Ease of use
  - • Role based dashboards

- Single click submission of requests/incidents
- ✓ Flexible reporting engine
- ✓ Ability to apply for leave and track the availability of the technicians through Technician Availability Chart

Key Features and Differentiators

One solution for every service, asset and process

Affordable and scalable to any business process globally

Flexible and configurable platform

Integrates and interacts with all core business apps

Omnichannel Access with superior end-user experience

Context aware and automation enabled

SapphireIMS Service Desk Functional Blocks

Voice | Web | Mobile App | Kiosk | SMS | email | Corporate App | API

Access

Intelligent Workflow | Flexible Data Models | Dynamic Fields & Forms

Enterprise Service Management

Self-Service | Service Catalog | Knowledge Base

Task & Process Automation | SLAs & OLAs | Business Rules

Cloud | On Premise

Notifications & Escalation | CSAT & Surveys | Analytics & Dashboard

Integrate

HRMS | AD, LDAP, IDAM | ACD , IVR | SMS Gateway | Email | Chat | ERP | HIS | LMS

Built-in ITIL Standard Process Templates

SapphireIMS provides built-in ITIL based standard Process templates which can be customized based on your service operations process.

- ✓ **Incident Management:** Submit Incidents through Web Portal, Email, SMS, or Monitoring Tools. Categorize Incidents based on Service, Category, and Subcategory and manage them till resolution against SLA. Ensure that service operations team adheres to the process by modelling workflow based on your organization process
- ✓ **Service Request Management:** Enable end users to request services directly and allows service operations to fulfil the requests effectively upon due approvals, etc. Self Service Portals, Service Catalogue and Quick Ticketing Templates offer easy to use interfaces and enhance overall experience
- ✓ **Problem Management:** Identify and submit frequently occurring issues as problems; perform Root Cause Analysis and understand Business Impact. Manage problems effectively to reduce Incident volume and service downtime
- ✓ **Change Management:** Manage the Changes in your mission critical business operations environment via well-defined change management process. Request for Change (RFC) can be created with clear impact analysis, schedule, impact of not changing, back-out plan and Change approval board (CAB) permissions to be sought. Upon approval, can be tracked till successful change implementation

Quick Ticketing Template

- ✓ Define various Quick Ticketing Templates based on common Incidents or Service Requests
- ✓ Allows end user to submit Incidents or Service Request accurately upon a click

Service Catalogue

- ✓ Publish the list of IT services that is offered to the end users
- ✓ Comprehensive information capture like description of the service, scope of the service, what is covered and not covered by the service, service owner, service availability duration, status, etc.
- ✓ Complete picture of the service details offered to users, with a facility to access the services

Mobile App

- ✓ Supported on iOS and Android Mobile OS based devices
- ✓ Support for Field Force Automation
- ✓ Ability to perform the following:
  - Login to the Service Desk Portal
  - Submit tickets
  - Quick Ticketing Template to allow end user to submit Incidents or Service Request accurately upon a click
  - Context Sensitive Dashboard with vital information
  - Perform state changes (assign, approve/reject, resolve, etc.)
  - Upload a File as Attachment to a Ticket
  - Download an Attachment File from a Ticket
  - Sign-In/Sign-Out facility for Technicians to publish their availability
  - Support for Active Directory based User Authentication with Multiple Domains Support for On-Premise and On-Cloud hosted SapphireIMS Server
  - Support for Gmail Email Id based User Authentication for On-Premise and On-Cloud hosted SapphireIMS Server
  - Support for Microsoft Office 365 Email Id based User Authentication for On-Premise and On-Cloud hosted SapphireIMS Server
  - AD and ADFS Single-Sign-On (SSO) to simplify the login process
  - Gmail Single-Sign-On (SSO) to simplify the login process
  - Microsoft Office 365 Single-Sign-On (SSO) to simplify the login process

Customizable Workflow

- ✓ Customizable and Robust Workflow Engine to define custom ITSM processes
- ✓ Supports creating multiple sub-processes in a workflow
- ✓ Process definitions based on Roles
- ✓ Drag and Drop Workflow Builder
- ✓ GUI representation of a workflow

SLA Management and Monitoring

- ✓ Define Multiple SLAs based on different lifecycle or process of Incidents/Service Requests
- ✓ Ability to stop the SLA timer during certain periods (definable like end user not available, awaiting approval, etc.)
- ✓ Define business hours policies and associate them with SLA
- ✓ Define holidays profiles and associate them with SLA

- ✓ Define SLA Time Duration based on Fixed Interval, Next Business Day (NBD) or Service Desk Additional Field
- ✓ Multi-level Pre-SLA Violation notification through Email and SMS
- ✓ Multi-level SLA violation escalations through Email and SMS
- ✓ Monitor the actual service delivery time against the committed service delivery time to gauge the compliance to the committed SLA

Hierarchical Escalation

Hierarchically escalate the service desk record to a higher level by a service desk engineer which can be performed at any point of time during the life cycle of a process.

- ✓ **User Escalation:** Manual trigger of hierarchical escalation, if the user is not satisfied with the resolution or with the progress of the service desk record
- ✓ **SLA Escalation:** Automatic escalation triggered when the process violates the configured SLA and results in SLA breach
- ✓ **Priority Escalation:** Automatic escalation triggered to notify the priority of the request when the priority of the record changes

State based Email and SMS Notification Rules

- ✓ Keep the right stakeholders informed on status change (New record creation, resolution etc.) and thus achieve better communication between Service operations team and Users
- ✓ Send personalized communication using Notification Templates

Robotic Process Automation (RPA) Framework

As organizations align IT/Service operations with business, service desk must provide options to integrate with corporate business systems like HRMS, ERP, etc.

SapphireIMS Service Desk along with RPA Framework offers well defined mechanism to integrate with HRMS to capture user information and organizational hierarchy information. It also provides a mechanism to trigger custom actions pre/post State Transition or Data Update of the records through UI Driven RPA Rules. The RPA Framework can also be used to update business data/systems.

- ✓ A UI based Middleware which acts as a bridge between SapphireIMS Application and a 3rd Party Application for seamless Web Service API based integration

- ✓ A Codeless Business Process Automation framework to automate the processes involved in Service Management operations
- ✓ Operates using REST Web Service API
- ✓ Built on Business Process Modeling Notation (BPMN) and Decision Model and Notation (DMN) standards
- ✓ Support for On-Premise, On-Cloud and SaaS based hosting

Parent and Child Ticket Creation

- ✓ Create child records against a parent record which requires multiple independent actions to be performed
- ✓ Indirectly track the progress of the Parent record through the status of child records
- ✓ Close the Parent record upon the closure of dependent child records

User Surveys

- ✓ Create your own User Survey forms with own set of Questions and Answers
- ✓ Circulate User Survey forms periodically for stipulated users and duration on Service Desk UI or through Email which helps an Organization to conduct surveys on specific topics among selected users
- ✓ Analyze responses provided by the users through Dashboards and Reports

Generic User Feedback

- ✓ Create your own Generic User Feedback forms with own set of Questions and Answers
- ✓ Circulate Generic User Feedback forms periodically for stipulated users on Service Desk UI or through Email which helps an Organization to collect generic feedback on a specific topic from selected users
- ✓ Perform Custom Actions once a Generic User Feedback is submitted by a user
- ✓ Analyze responses provided by the users through Dashboards and Reports

User Feedback (CSAT)

- ✓ Define User feedback forms with your own set of Questions, Question Weightage, Question wise Answer Options, Answer Rating, Question/Answer Display Order, etc.
- ✓ Configurable Question wise Answer Types (Radio Button, Dropdown List, Smiley and Star)

- ✓ Support for providing User Feedback for Service Desk Tickets through Service Desk Web Portal, Email with Web Link or Email with Smiley or Star
- ✓ Track user satisfaction using User Feedback Reports

End User Portal

- ✓ Personalized Dashboard with the status of the Incidents and Service Requests raised
- ✓ Smart Search Bar for the Users to quickly search Ticket, Quick Template, Knowledgebase Article, Repository File and Service Catalog
- ✓ Quick listing of assets that have been assigned to the user
- ✓ Elegant, fast, and customizable Incident and Service request submission form
- ✓ Shortcuts to Quick Template, Knowledgebase, Repository and Service Catalogue

Knowledgebase

- ✓ Build your Knowledgebase based on Incident record resolution details or previous experiences
- ✓ Helps Service Desk engineers to resolve Incidents
- ✓ Easier access to the Knowledgebase Articles for end users through context sensitive Knowledgebase Article Display in record submission form
- ✓ Support for configuring the Content Size of Knowledgebase Article
- ✓ Ensure completeness of the Knowledgebase Articles via Knowledgebase Manager approval mechanism for new Knowledgebase Articles
- ✓ Supports sending Template based Email Notifications for Knowledgebase Article Review, Update, Publish, Reject, Comment and Vote

KEDB (Known Error Database)

- ✓ Log of error records is created after a problem is published to KEDB to help incident management staff resolve incidents
- ✓ Sharing of known error information
- ✓ Approval mechanism to store known error database or knowledge base details
- ✓ Supports sending Template based Email Notifications for KEDB Article Review, Update, Publish, Reject, Comment and Vote
- ✓ Search contents and manage the same

Repository

- ✓ Upload frequently used documents and corporate software to the portal
- ✓ Make them available for End Users to download through restrictions with Roles

SapphireIMS REST Web Services API for integration with 3rd Party Applications

SapphireIMS Service Desk provides REST Web Service API which can be used for seamless integration with 3rd Party Applications to achieve various use cases. Following are some of the operations supported in SapphireIMS REST Web Service API:

- ✓ Create Incidents/Service Requests
- ✓ Modify the Status of Incidents/Service Requests
- ✓ Get the Current Status of Incidents/Service Requests with Ticket Field level details

Active Directory, OpenLDAP, Gmail and Microsoft Office 365 Integration

- ✓ Seamlessly integrate with the LDAP Services to ensure user data integrity
- ✓ Support for importing Users and User Attributes from Active Directory and OpenLDAP Servers to the SapphireIMS User Database for On-Premise and On-Cloud hosted SapphireIMS Server
- ✓ Support for Active Directory based User Authentication with Multiple Domains Support for On-Premise and On-Cloud hosted SapphireIMS Server
- ✓ Support for Gmail Email Id based User Authentication for On-Premise and On-Cloud hosted SapphireIMS Server
- ✓ Support for Microsoft Office 365 Email Id based User Authentication for On-Premise and On-Cloud hosted SapphireIMS Server
- ✓ Facility to import Users from specific Organizational Units (OU)
- ✓ Incremental and Full synchronization schedules as per business needs
- ✓ Map user attributes in SapphireIMS to specific LDAP Attributes
- ✓ AD and ADFS Single-Sign-On (SSO) to simplify the login process
- ✓ Gmail Single-Sign-On (SSO) to simplify the login process
- ✓ Microsoft Office 365 Single-Sign-On (SSO) to simplify the login process

Service Desk beyond IT Operations (Enterprise Service Management)

✓ Supports designing of various Non-IT Processes for departments like HR, Admin, Finance, Facilities, etc.

✓ Customizable workflow to adopt complex Non-IT Processes

✓ Supports custom Approval Processes

✓ Integrates with HRMS Systems

Advanced Reports

✓ An Advanced Service Desk Reporting Engine with the capability to generate Advanced and Complex Reports from the User Interface

✓ Support for generating Crosstab Report and Chart Report with Data Drilldown facility

✓ Support for Advanced Charts like Pareto, Waterfall, etc.

✓ Ability to generate Multi-Dimensional and Meaningful Reports for effective Data Analysis to gain Quick Insights

✓ Support for filtering Report Data through Dynamic Filters for instant Data Analysis considering various factors

Dashboards and Reports

- ✓ Ready to use Dashboards along with facility to create Custom Dashboards
- ✓ Supports Dashboard Widgets with configurable Widget Size
- ✓ Industry standard Built-in Reports
- ✓ Custom Report Builder
- ✓ Export Reports to Excel and PDF Files
- ✓ MIS Reports
- ✓ Scheduling of Reports for automatic Report generation and emailing of the same