Getting Started
25 Requirements for a Service Desk Solution

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Are Your Incidents Managing You?

Don't worry if the answer to the question above is a resounding, "Yes!" In fact, it's not uncommon to see even large, seasoned IT organizations making incident management process decisions based simply on the fact that their current tool doesn't quite provide the capabilities they need. Of course, once you know the answer to the question above, the next question should really be, "How does our Service Desk tool allow us to manage incidents, problems, and requests as efficiently as possible?"

First and foremost, you are going to need to decide on a framework. A great place to start and the one we recommend is ITIL. The best practices found here, will be a perfect foundation for the entire scope of IT Service Management, and much of that begins at the Service Desk. Next, you will need to start evaluating and implementing processes, keeping those best practices in mind, and using them as direct guidance. Finally, and simultaneously with your process exercises, you will need a Service Desk solution that will work in parallel with these process changes/improvements.

By tackling the challenge this way, you will be able to fully address the core responsibilities of improving your Service Desk. Essentially, this combination of process change and improved technology will allow you to:

- Overhaul the resolution process, creating a streamlined approach to get answers to employees faster.
- Optimize prioritization of incidents, problems, and requests to operate your Service Desk more efficiently.
- Improve the way your IT organization adapts to changing business requirements, enabling you to stand out as a resource, not a roadblock to the rest of the enterprise.

- Deliver the appropriate metrics to support your management team more effectively, and make better, more informed decisions about the direction of your entire IT organization.

- Now, since it is very likely that your current tool, that ticketing system that is flooding your inbox (heck maybe your system is your inbox), is holding your entire IT organization back. While it may seem impossible that order can be brought out of the chaos, there are some really great solutions, and of course there are some bad ones as well. Luckily, you have this guide that will walk you through the twenty-five key requirements that a Service Desk solution should have. So, congratulations on taking your first step to experiencing true change and improvement in your IT Service Management organization.

How to Use This Guide

- Read through the list of twenty-five key requirements.

- Starting with a score of 100, subtract 4 points for each requirement you are missing.

Threat Level	Score	Description
Warning	92-99	Your solution is incomplete.
Elevated	80-91	Your solution lacks major functionality.
Imminent	< 80	Your solution prevents visibility to your IT infrastructure.

25 Key Requirements

The Service Desk Solution Should...

1. Use ITIL terms and definitions, making sure workflows and processes are based on ITIL best practices.
2. Allow users to submit incidents and requests through a variety of channels (self-service web, email, etc.), and provide differentiated access based on license and role, including a range of customizable access from requestors (customers) to IT Staff.
3. Provide a customization tool, letting users select which fields are required either by editing the form or by modifying the underlying entity model.
4. Feature a simple interface (no coding) for changing form field labels to match defined, or constantly changing business requirements.
5. Include standard reports out-of-the-box, with creation and modification handled by a built-in report designer.
6. Enable users to create metric-based reports, such as Number of Incidents Created by Date by Agent, and Number of Incidents Opened by Month/Week, based on any field in the incident module.
7. Record all changes (who made the change, the action performed, the date/time stamp, and any comments the user added) made to an incident history — including changes made by Business Policy Automations (BPAs).
8. Allow administrators to define business rules, or Service Level Agreement (SLA) parameters that will trigger specific actions performed against an incident.

9. Enable users to create and modify automatic notification rules, or create Service Level Agreement (SLA) automations that allow for the escalation of incidents to specific users, and notification recipients based on those or other criteria.

10. Provide a manual method for creating incidents by submitting through a self-service web and sending an e-mail to a monitored mail account.

11. Generate unique IDs per incident, recording the date/time stamp when an incident is created and any subsequent actions performed on the incident.

12. Include editable fields for the incident requester's e-mail and phone number, with the initial values of the fields are populated from the requester's user record.

13. Enable administrators to create system views that separate service requests from incidents.

14. Support the ability for users to select an incident category from a hierarchical drop-down list of incident types.

15. Feature a priority field that enables users to select a priority value when entering an incident, and then modify it at any time during the process.

16. Provide functionality allowing incidents to be automatically or manually routed/assigned to users, roles, or entire teams.

17. Ensure users can enter symptoms and other information in the description field, or add files as attachments.

18. Include a mechanism for staff members to enter diagnostic activities in a notes field, with the field recording the date/time stamp of the entry and the name of the user who made each entry.

19. Have the ability to rapidly create incidents by duplicating existing incidents and creating incidents from templates.

20. Automatically change the status of incidents based on the actions performed on it.

21. Include a resolution area on/within the incident that includes the recorded resolution information, and the date/time that an incident was resolved.

22. Upon the closure of an incident, allow users to select the closure type, with the date and time that the action is performed is also included in the history.

23. Provide a user the opportunity to enter comments when verifying that an incident has been resolved successfully and to their own satisfaction.

24. Allow users to access the Knowledge Base directly from incident reports via a “search button,” or from a link button within specific areas of the application.

25. Provide a mechanism to create a service request directly from an incident report, or link the service request to the incident.