



HALOITSM System Overview

Explaining the features and benefits of HALOITSM

HALO Service Desk 2021

HALO
empowering service

 **100+** million
tickets a year



100,000+
Users globally



In more than
40+
Countries



93%
first time resolution
for support

Rated **#1**
As the fastest service desk
available on the market



Home

Good morning Tim Tuesday, October 22nd 2019
10:31

 **Tim Barton-Wines** tim.barton-wines@nethelpdesk.com
IT Manager ● Available


Incidents


Requests


Problems


Change Requests


Projects


Calendar


Customers


Opportunities


CMDB


Contracts


My Approvals


Knowledge Base


Suppliers


Timesheets


Search


Reporting


Dashboard


Configuration

New Tickets (Week by Week)



12:04

Good afternoon Tim Tuesday, October 22nd 2019
12:04

 **Tim Barton-Wines**
IT Manager ● Available


Incidents


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CMDB



100,000+ people, from 40+ countries, manage their work with HALO such as:



“

HALO's flexible approach has allowed us to seamlessly replace the existing system whilst maintaining service to our customers. The training and consultancy services provided allowed us to train all staff involved, identify and develop areas of improvement.

”

- Julia Rudd, ICT Applications Team Manager - City of Cardiff Council





“

Having 350 Technicians, 16 mailboxes, 1200 Internal customers and handling 93,000 public calls, HALO allows SEPA to efficiently transfer calls from our Communications centre to the correct department and ensures our customer enquiries are tracked efficiently.

”

- Alan Johnson, IS Project Manager - Scottish Environmental Protection Agency



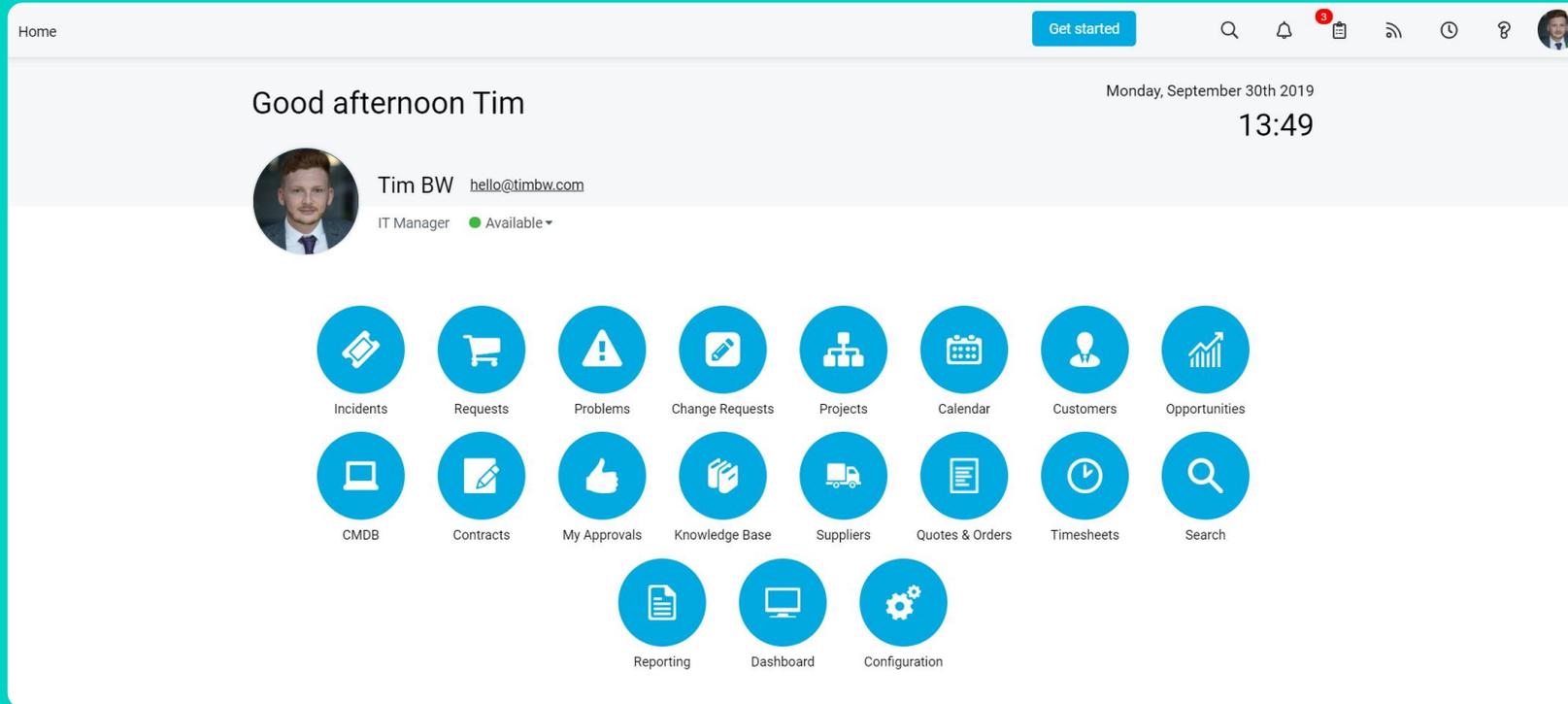
HALOITSM Quick Walkthrough



VISUAL BREAKDOWN OF SOLUTION

HALOITSM in a nutshell.





VISUAL BREAKDOWN OF SOLUTION

1. Your Everyday Welcome Page

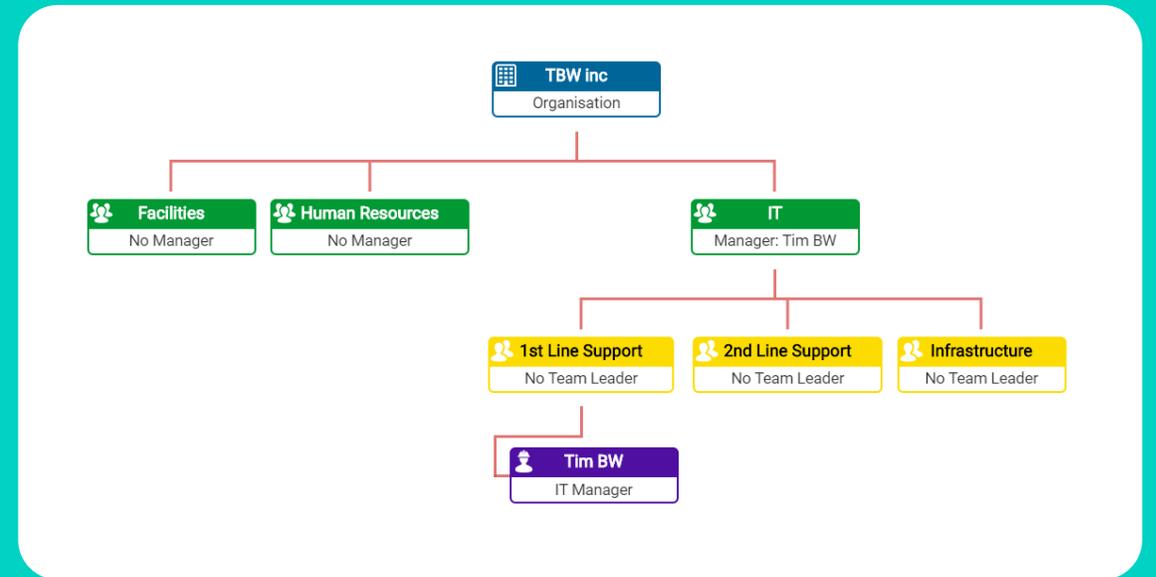
HaloITSM's homepage is your mission control for managing your department. Embodying one of our core attributes, configurability, it enables you and your team to granularly refine what is available to different team members.



1. Your Everyday Welcome Page Cont.

For different teams and different office locations, you can use the customizable language module found in the configuration section to replicate any terms you utilize internally - This also contributes to reflect full ITIL terminology within the system.

HaloITSM comes out the box in ITIL configuration. You can restrict teams and modules in accordance to what each member is responsible for, ensuring that every roles internally has the correct level of access to fulfil their duties.



2. Team Ticket Screen

HaloITSM's team ticket screen is the result of a long internal study on the best way to display large amounts of varying information. You can customise every element on this page, these include:

1. Teams – name, number of them, who is part of which team etc.
2. Which mailbox is assigned to each unassigned queue.
3. View format of how you would like your tickets displayed.
4. Ticket Types
5. Status's
6. Service Level Agreements
7. View of what columns are shown for each ticket.

The screenshot displays the HaloITSM interface for viewing unassigned incidents. The left sidebar shows a navigation menu with 'Incidents by Team' and 'Open Incidents' sections. Under '1st Line Support', there are three items: 'Unassigned' (3 tickets), 'Tim BW (You)' (2 tickets), and '2nd Line Support' (Unassigned). Under 'Infrastructure', there is one 'Unassigned' item. The main content area shows a list of three unassigned incidents. The table has columns for ID, SLA Time Left, Summary, Priority, Status, Type, and Date Created. The first incident has ID 0002137, SLA Time Left of 23:11, Summary 'Welcome to NetHelpDesk - Start Here', Priority 'High', Status 'NEW', Type 'Incident', and Date Created 'Yesterday at 13:00'. The second incident has ID 0002139, SLA Time Left of 21:11, Summary '[Hint #2] - Raise your first incident', Priority 'High', Status 'NEW', Type 'Incident', and Date Created 'Yesterday at 11:00'. The third incident has ID 0002140, SLA Time Left of 22:12, Summary '[Hint #3] - Self-service portal', Priority 'Medium', Status 'NEW', Type 'Incident', and Date Created 'Yesterday at 12:00'.

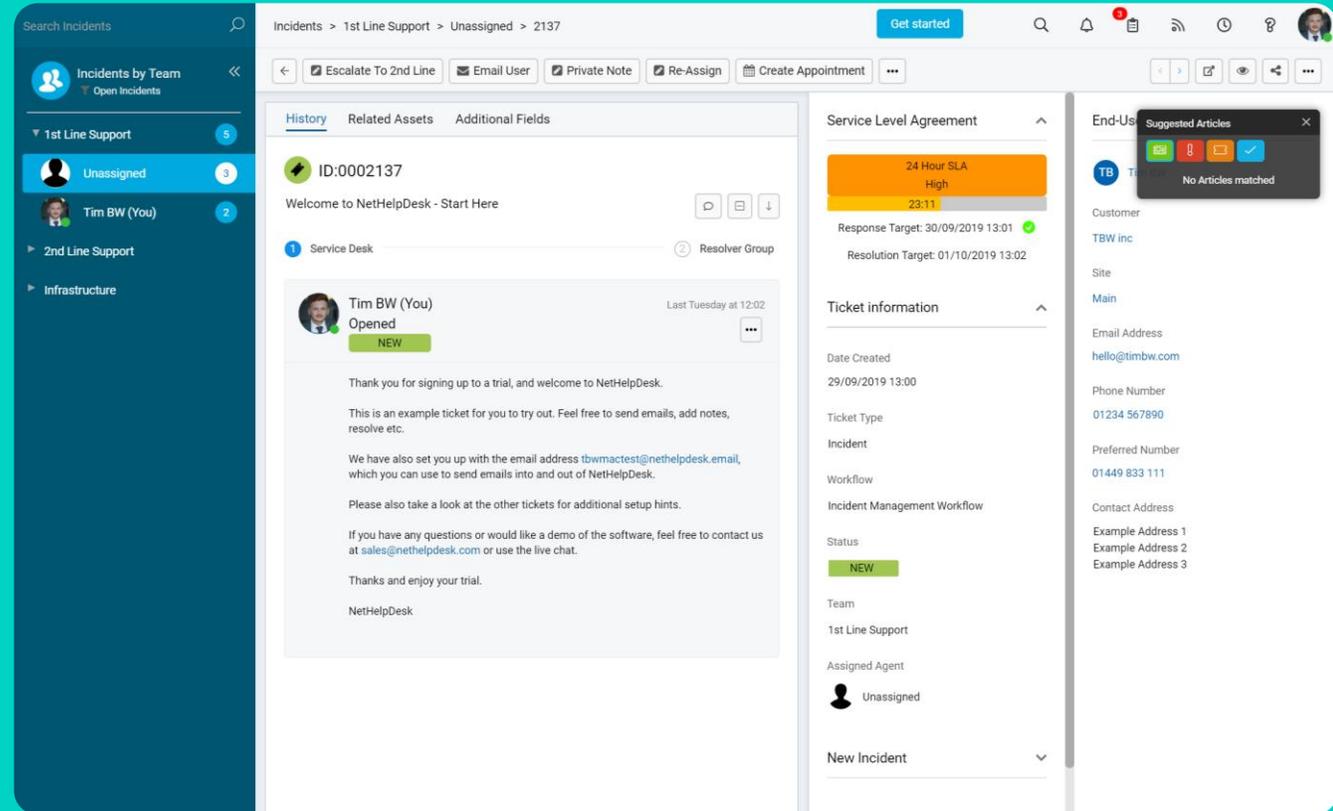
ID	SLA Time Left	Summary	Priority	Status	Type	Date Created
0002137	23:11	Welcome to NetHelpDesk - Start Here	High	NEW	Incident	Yesterday at 13:00
0002139	21:11	[Hint #2] - Raise your first incident	High	NEW	Incident	Yesterday at 11:00
0002140	22:12	[Hint #3] - Self-service portal	Medium	NEW	Incident	Yesterday at 12:00



3. Ticket Screen

This is the main ticket screen within HaloITSM, along the top we have the actions – these are fully customisable, you can create your actions, give them their own names and icons, and then have them do what you wish to progress a ticket through it's flow.

The ticket on show is an internally created ticket, it will auto assign to the correct user through association of email address. You can also have tickets generated directly from phone calls (pictured on the next slide)



3. Ticket Screen Cont.

The call management tool is one of many that HalOITSM has which helps team become more time efficient when delivering service.

Another of which is our match bot (This is pictured top right of the ticket screen). This automatically opens when it finds a match after scanning keywords in the ticket, relating this to helpful knowledge base articles to resolve the ticket, or if none are available it will use keyword matching technology to associate other similar tickets, such as open incidents, problems or change requests – to help you see the bigger picture and to allow you to stay aligned to ITIL V3 frameworks.

The screenshot displays a ticket management interface. On the left, there's a sidebar with 'Unknown' status, 'TBW inc' customer, and 'In Progress - 00:00:32' duration. Below this are sections for 'Caller Info' (Customer: TBW inc/Main, Caller Name, Email Address, Phone Number: @callerid, Contact Address: Example Address 1, 2, 3), 'Call Notes' (with input fields for summary and notes), and 'Call Outcome' (Resolved, Log Ticket, Complete button). The main area is titled 'Overview for TBW inc/Main' and features three summary cards: 'Open Tickets: 7', 'Total Tickets: 8', and 'Opened in last 30 days: 7'. Below these are 'Open Tickets' listed with details for tickets 2140, 2144, 2146, and 2145, including their dates, statuses (NEW, AWAITING AP), and associated links like '[Hint #3] - Self-service portal' and '[Hint #4] - Mobile Apps'. On the right, a 'Recent Activity' section shows a list of events such as '#2146 - New Ticket Logged', 'Admin (Example Organisation (1)/Main) #2144 - New Ticket Logged', '#13 - Activity Added', '#2140 - New Ticket Logged', '#2139 - New Ticket Logged', '#2138 - New Ticket Logged', and '#2137 - New Ticket Logged'.

The 'Suggested Articles' panel shows a list of help articles with icons for each. The articles include: 'How do I change the Logo on printed requests', 'Standard Requests - how to create one', 'On login it shows requests for the first client in the', 'User defined request queries show too many requests', and 'After upgrading some requests dont show on the'. A 'View all 8 Articles' button is at the bottom.

The 'Matching Problems' panel displays a list of related problem tickets with their IDs and descriptions: '155336 - Report in an e-mail pointing to the end user', '145925 - Area/Client search not loading', '121545 - Scheduled Maintenance Requests', '119373 - Service request Tags', and '115559 - Auto-requests not change status'. A 'View all 6 results' button is at the bottom.

The 'Similar Open Incidents' panel shows a list of similar open incident tickets: '159501 - Logging new requests', '156389 - Approval Process Not Working', '155817 - Service Requests / ITAs multiple approval', '147371 - Status changes for Service Requests', and '119480 - Scheduled requests query'. A 'View all 9 results' button is at the bottom.

The 'Similar Closed Incidents' panel displays a list of similar closed incident tickets: '156355 - Change Requests', '154393 - Nethelpdesk', '153953 - Requests Logged Extended', '153686 - Reporting', and '149560 - requests missing on mobile app'. A 'View all 149 results' button is at the bottom.

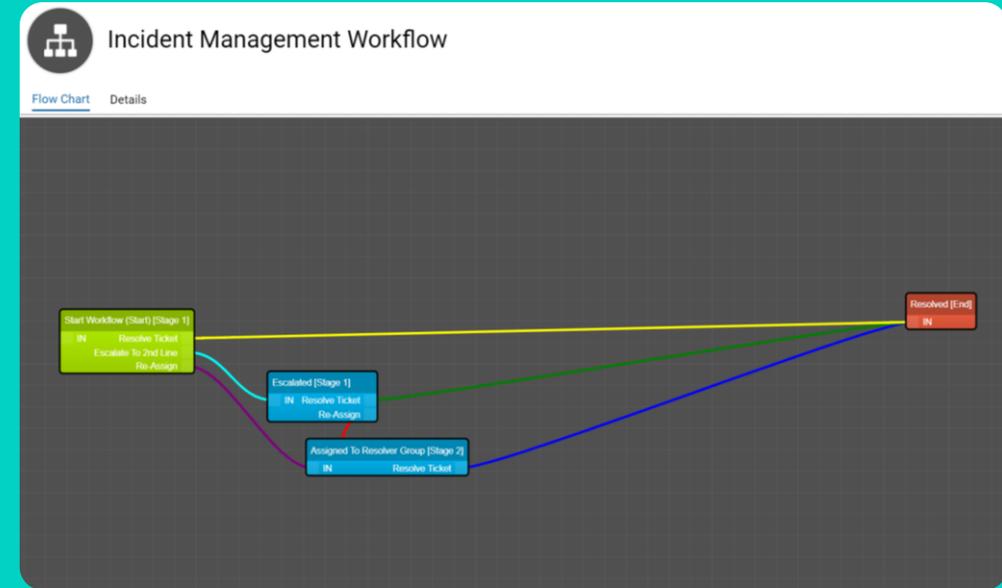


4. Workflows

HaloITSM's workflows are a powerful tool which enables you to fully map out all internal processes for any activity your team undertakes. You can restrict down what exact Actions are available at every stage of a ticket's life cycle - allowing you to put an entire process on rails to maintain efficiency.

So, for standard support tickets such as a Incident ticket types you can create your own actions, for example, a Triage action – and then have this as the only action available which means your technicians are forced to enter certain information before proceeding. Once this is complete, they can proceed, and all actions become available once again to work the ticket as normal.

This allows you gather some important data to report against within the Reporting suite, such as tickets by category. Allowing you take management level decisions to reduce certain types of incoming incidents.

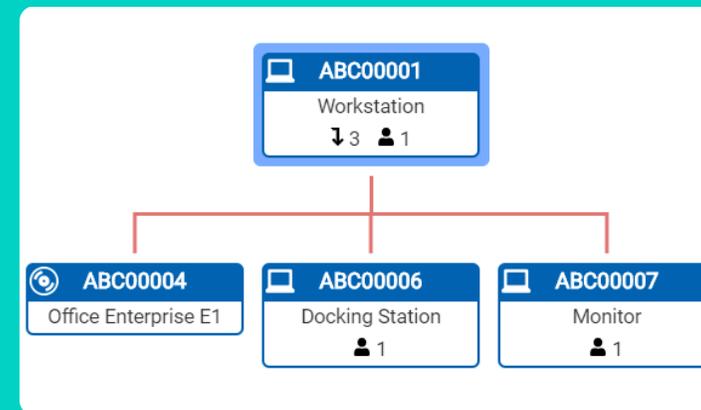
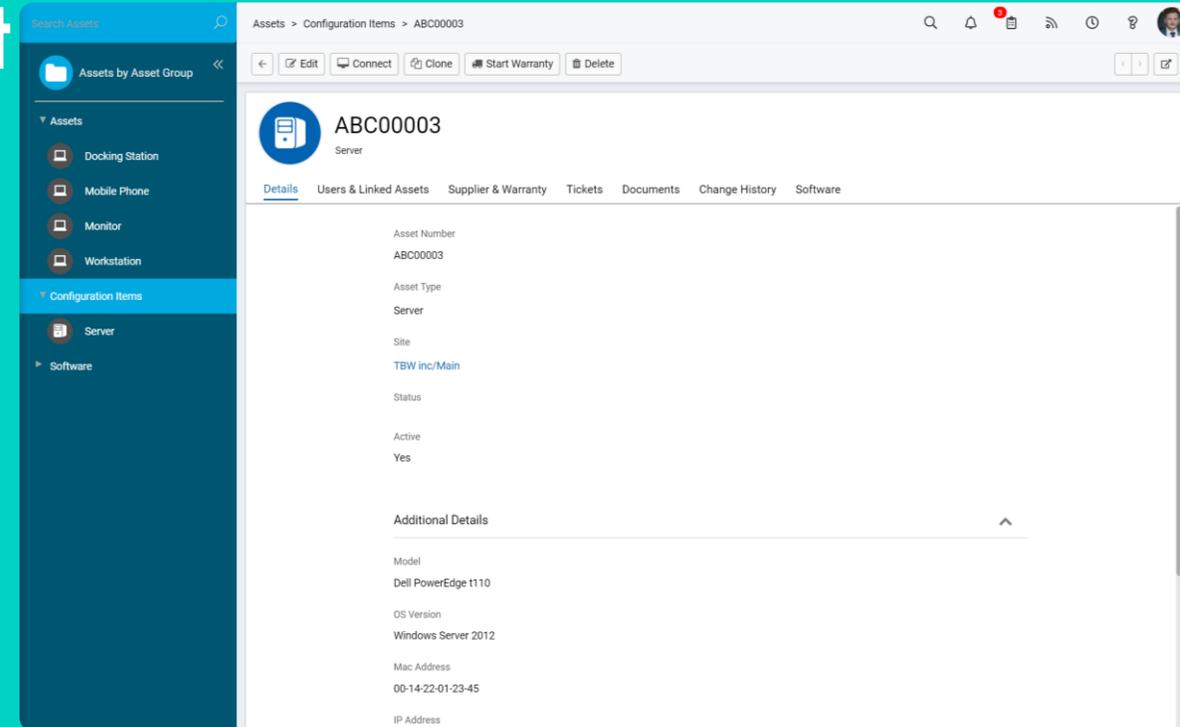


5. CMDB – Asset Management

HaloITSM CMDB is a dedicated module to allow you to manage and maintain your departments assets. You can create new categories of Assets, as well as the Asset Types, and add Customized fields to these to reflect the exact information you wish to keep on all assets.

Pictured on the action bar is 'Connect' this allows you jump straight from a ticket into the device via multiple methods of connection, such as RDP or Teamviewer or your preferred supplier for remote sessions.

You can utilise dependency charts (pictured to the right) to map out your infrastructure and to take risk analysis reports before making changes, there's also built in approval process functionality to allow you to request (Ad Hoc) permission from the individual who is responsible for the asset you are effecting with your change request.



6. Contract Management

HaloITSM's Contract management allows you keep track of all contracts keep internally and from suppliers.

You can have multiple contracts at the same time, as well as associate assets directly to contracts. There is also the ability to define SLA's against these if one is kept.

The Pause Expiry Alarm gives you the opportunity to go to market before your renewal is due, to ensure you are receiving the best value from your suppliers.

A document repository space is also available across the system, such as office sites, end users, and assets etc. In Contracts, this can be used to capture the original signed contract and any other relevant documentation around this.

The screenshot displays the HaloITSM interface for managing contracts. On the left is a dark blue sidebar with a search bar and navigation options: 'Customer Contracts' (selected), 'Supplier Contracts', and 'Assets'. The main content area is titled 'Customer Contracts' and features a search bar, a back arrow, and action buttons for 'Edit', 'Pause Expiry Alarms', 'Clone', and 'Delete'. Below this is a card for contract 'ABC00001' with a green edit icon. The card has tabs for 'Details', 'Assets', 'Periodic History', and 'Documents'. The 'Details' tab is active, showing a list of contract attributes: Customer (Customer 1), Contract Reference (ABC00001), Start date (01/01/2016), End date (No end), Billing Period (Monthly), Hours per Period (0), Billing Description (No Billing Description), and Date of first Invoice.

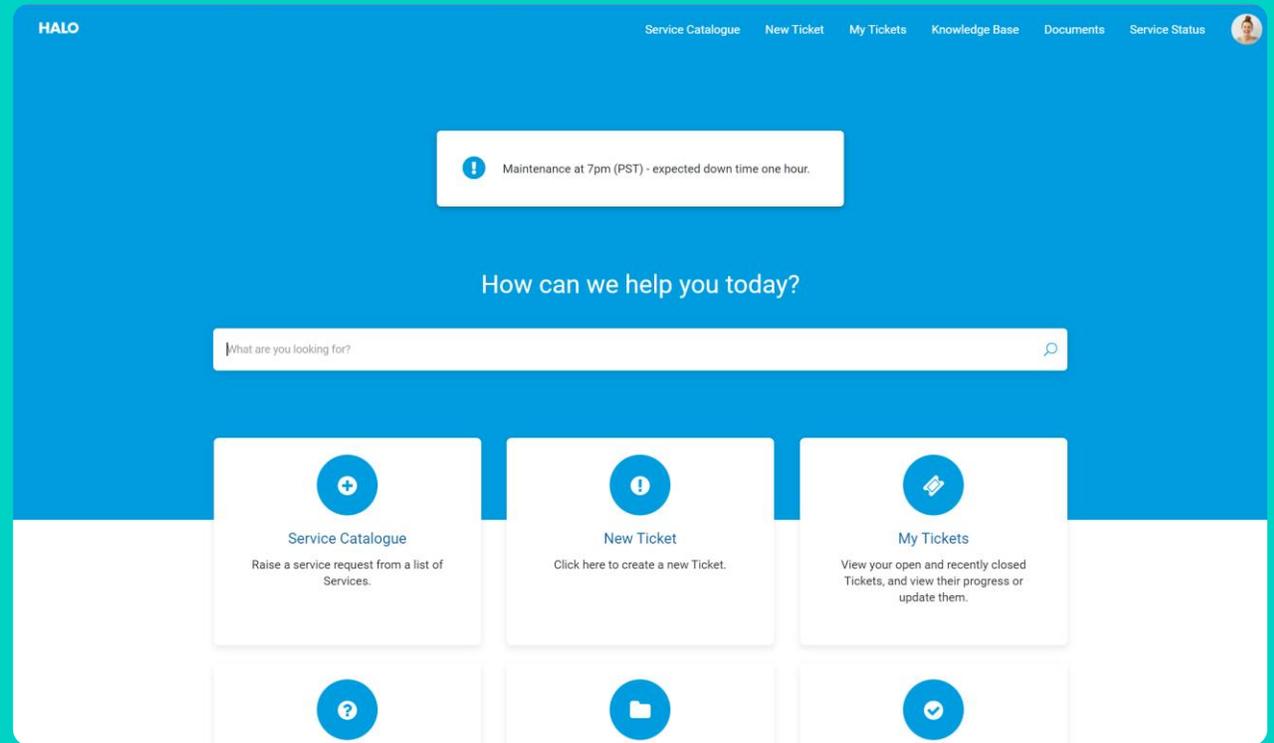


7. End User Portal – Orientated around self-service.

HalolTSM's end user portal is fully white label, fully editable within the UI – allowing you to fully shape all the containers, colours and branding to create an extension to your website. Pictured is a representation of what this could be, as well as being the standard portal that comes with the solution.

You can provide 3 tier access levels to end users, so they can either view all tickets raised by organization, site location or end user (just the ticket raised by this individual).

The portal is available in multiple languages and has the ability to have button with external links to be placed onto, allowing you to link end-users to other tools or external areas of your infrastructure.





Service Catalogue

Search...



All Services

Accounts and Access

Hardware

Software



Administrator Rights

Click here if you require administrator rights.



Desktop

Click here to request a new desktop.



General Network

Click here to make a general network request.



Hardware Collection

Click here to request collection of IT hardware.



Laptop

Click here to request a new laptop.



Leaver

Click here to inform IT about an employee leaving.



Mobile Phone

Click here to request a new mobile phone.



New Starter

Click here to request a new employee account and equipment.



Non Standard Request for IT H...

Click here to make a hardware request, which doesn't relate to any of the other services.



Peripherals

Click here to request peripherals e.g mouse, keyboard, headset etc.



Print Services

Click here to request print services.



Shared Drive Access

Click here to request access to a shared drive.



Software

Click here to request software.

VISUAL BREAKDOWN OF SOLUTION

7. Service Catalogue Cont.

The Service Catalogue comes out the box with a number of requests, this are fully editable forms with means that end users can request services after submitting any information required to complete the activity.



New Starter

Click here to request a new employee account and equipment.

New Starter Request

* denotes a mandatory field

New Starter Details

First Name *

Last Name *

Employee ID *

Starting Date

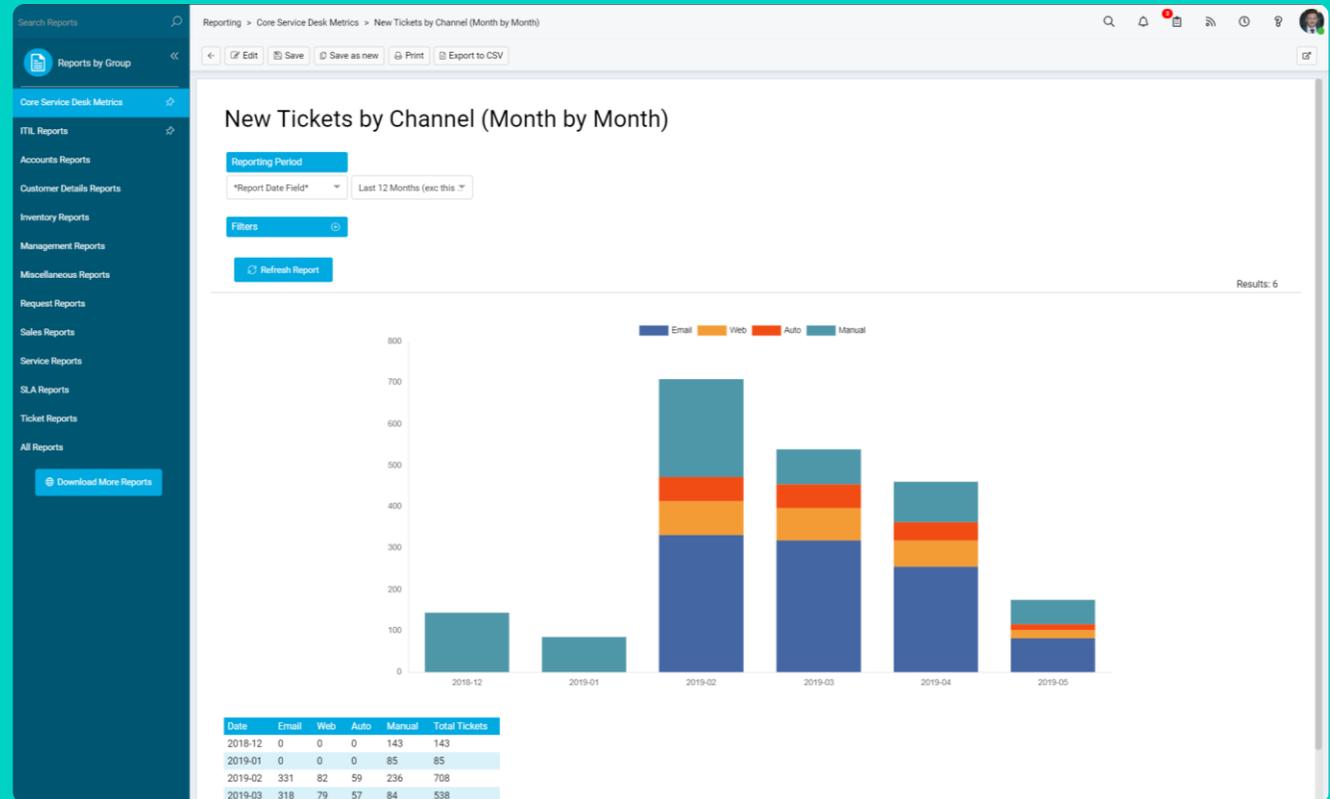


8. Reporting Analytics

HaloITSM's Reporting and Data Analytics functionality allows you to create any bespoke report you wish to gain transparency into any function within your department. You can better understand incoming tickets, to get to the root cause of why they are being generated or create a business case to hire new staff or purchase new equipment.

You can write a unlimited number of reports, there's graphic generators to create visual from the data being compiled. You can restrict access to these from the library dependent on the sensitivity of the report. From here you can then schedule these out, so these valuable insights are automatically delivered to any lists of emails you to inform.

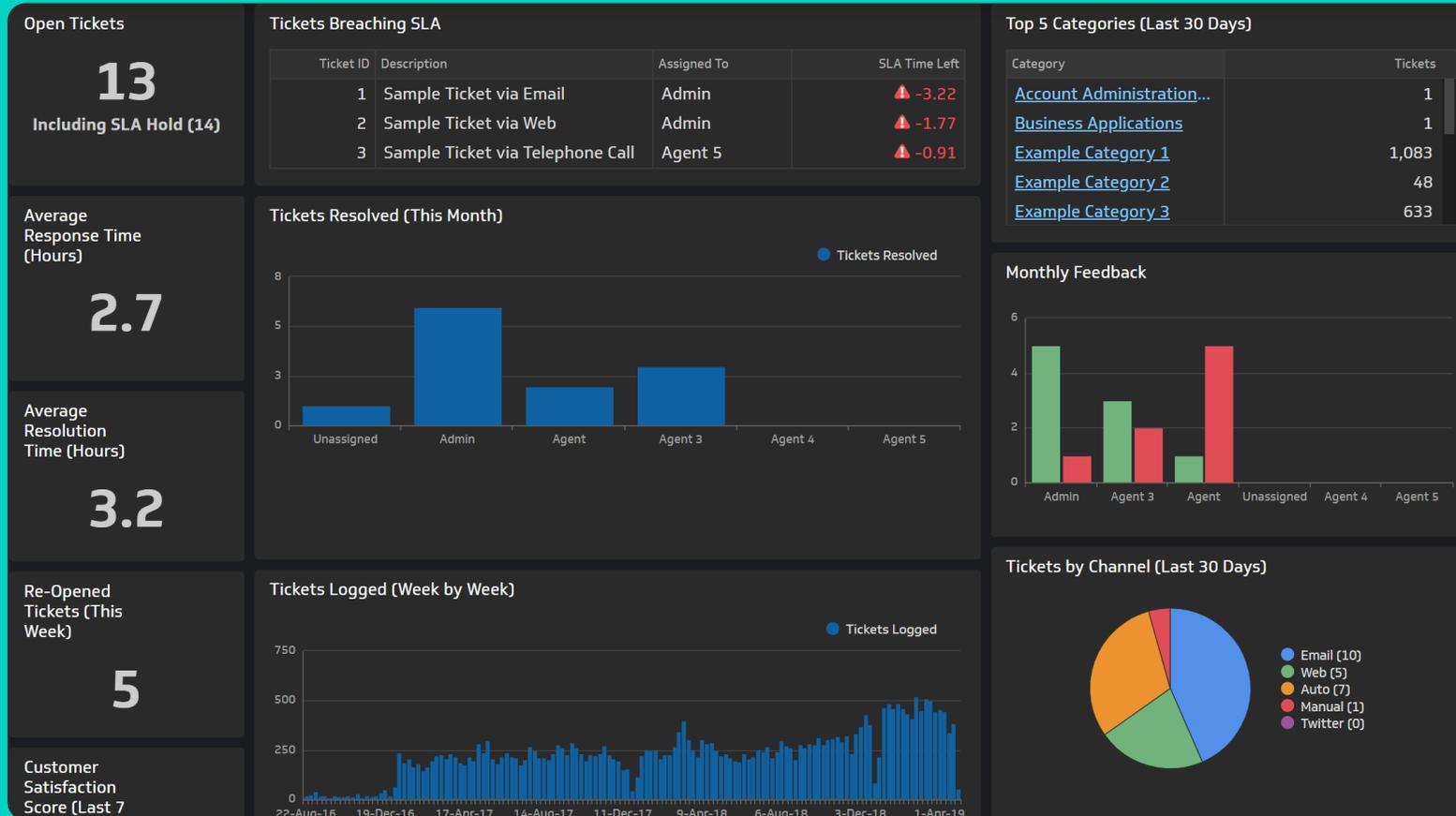
There are 150~ reports available out the box, with an additional 2,500 reports available for free via our online repository, called 'Download more reports' in the screenshot above.



8. Reporting Analytics Cont.

We also offer advanced dashboards as part of the system, these can be created with ease, and can contain whatever information you wish to stay informed about.

Most usually found presented on a wall TV, these can also be kept as a separate management browser tab to keep managers informed on departmental critical information.



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An Industry Leader - But don't just take our word for it

Here's what customers rated HaloITSM vs ServiceNow, ManageEngine, FreshService, Cherwell, Hornbill, Ivanti TOPdesk and Spiceworks.

HaloITSM vs ServiceNow – What does Gartner Peer Insights say?

Accurate as of August 2019



HaloITSM vs ManageEngine – What does Gartner Peer Insights say?

Accurate as of August 2019



HaloITSM vs Freshservice – What does Gartner Peer Insights say?

Accurate as of August 2019



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Accurate as of August 2019



HaloITSM vs Hornbill Supportworks – What does Gartner Peer Insights say?

Accurate as of August 2019



HaloITSM vs Ivanti – What does Gartner Peer Insights say?

Accurate as of August 2019

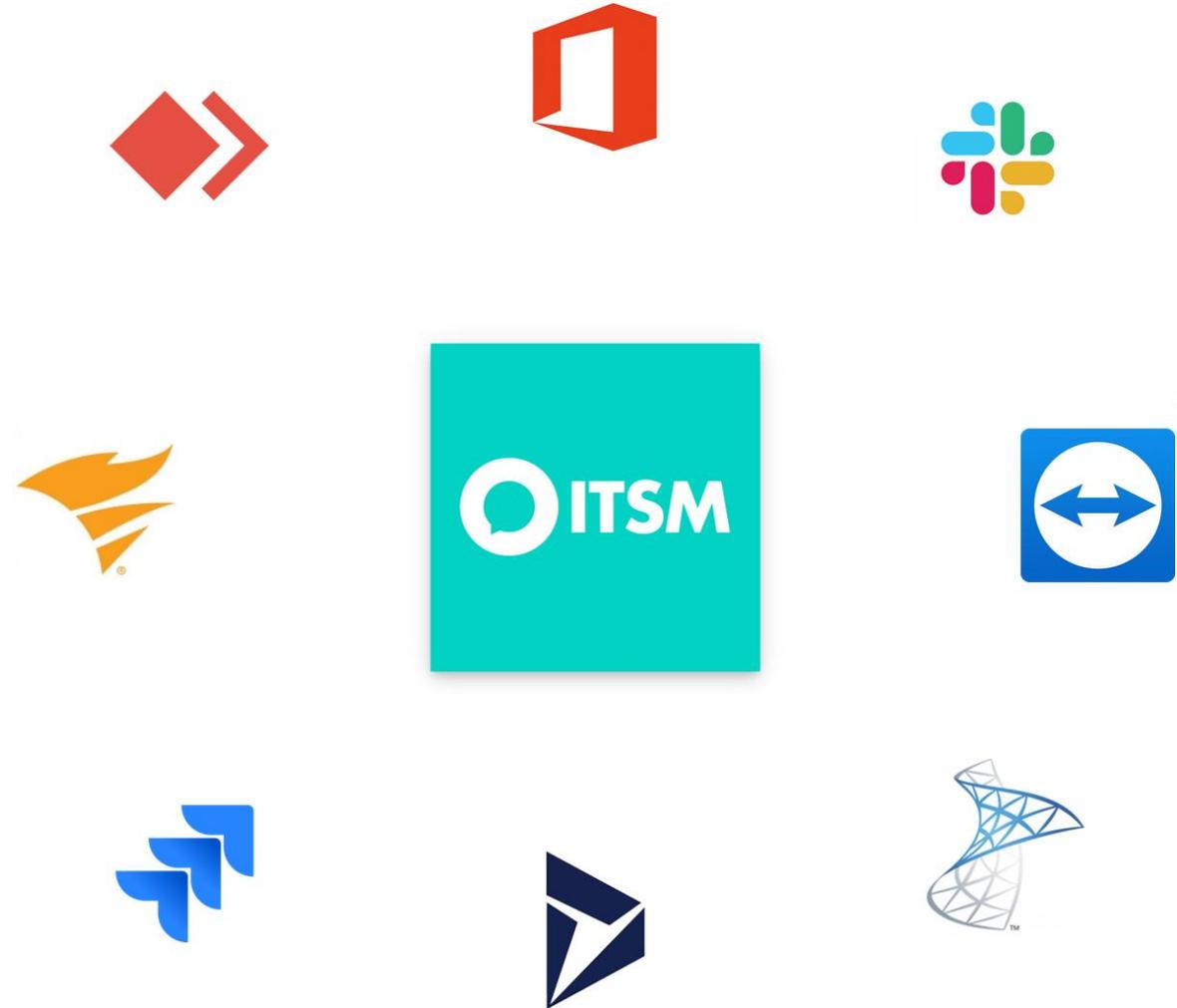
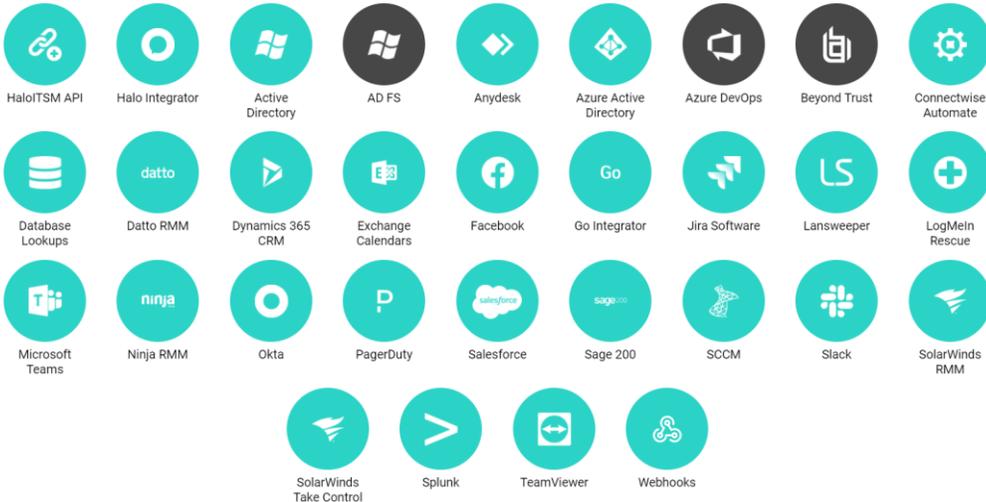


VISUAL BREAKDOWN OF SOLUTION

Extend HaloITSM with Apps

Integrate HaloITSM into your favourite tools with a few clicks. We plug into the tools IT teams need to centralise information and streamline the service delivery process.

Integrations





Thank you

**For more information or further assistance,
please contact your Sales Representative.**

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