Helpdesk Overview

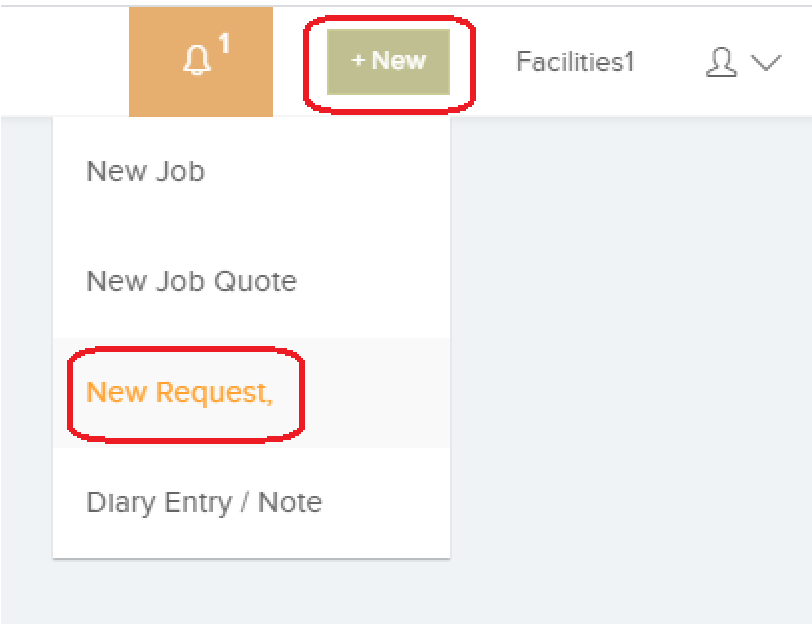
Clients and end users can create "job requests" which the central team or helpdesk can then review and approve into full reactive jobs. These jobs can then be managed though a life-cycle from issuing the work to a contractor or internal engineer through to completion.

Email notifications can be sent to the client and helpdesk through the journey of the job request through to the completed job.

The highly configurable system gives you lots of options and flexibility.

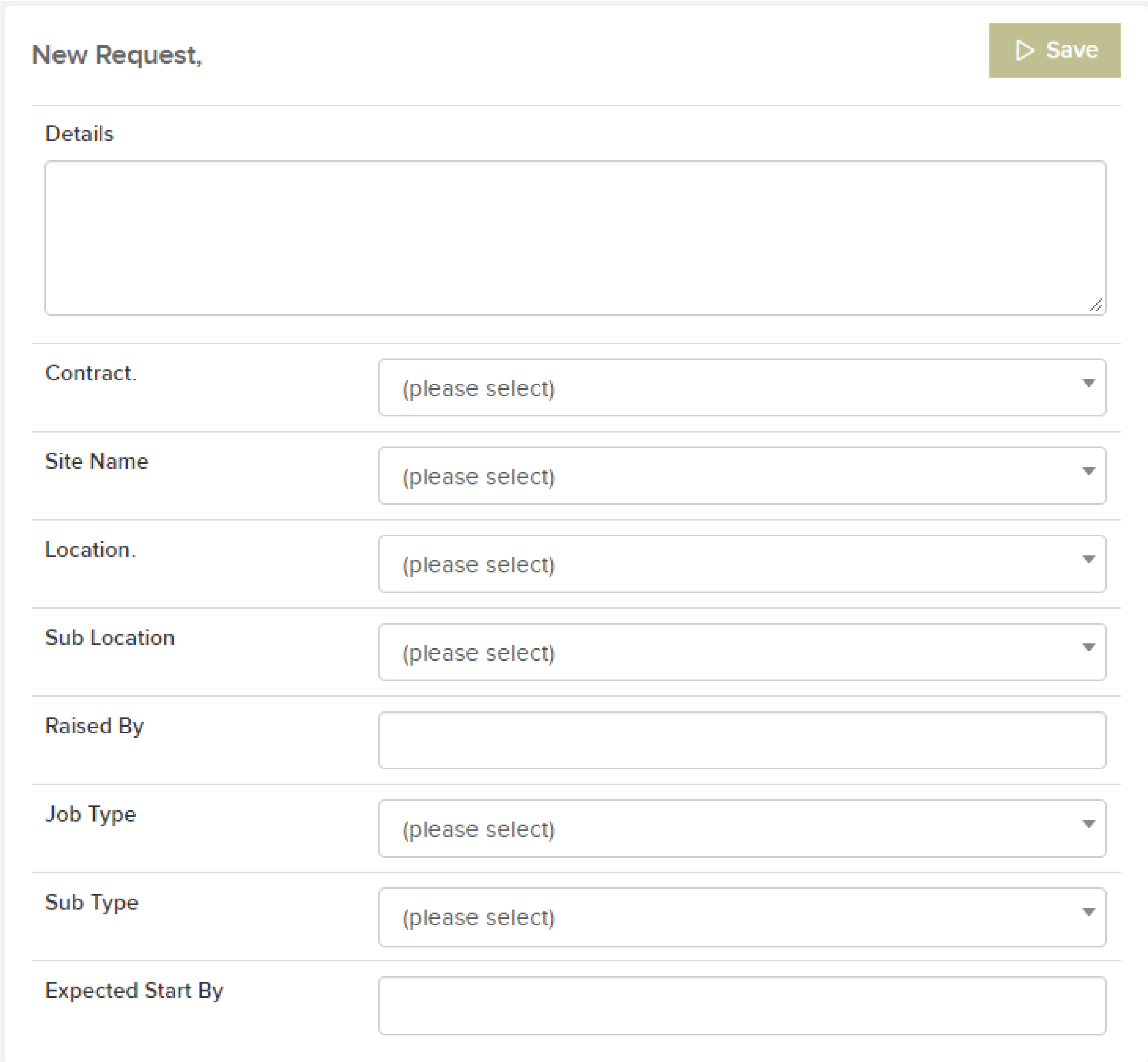
Creating Job Requests

Requests can be created by logging to Trackplan's web-based application, and selecting the *+NEW* button at the top-right of the page:



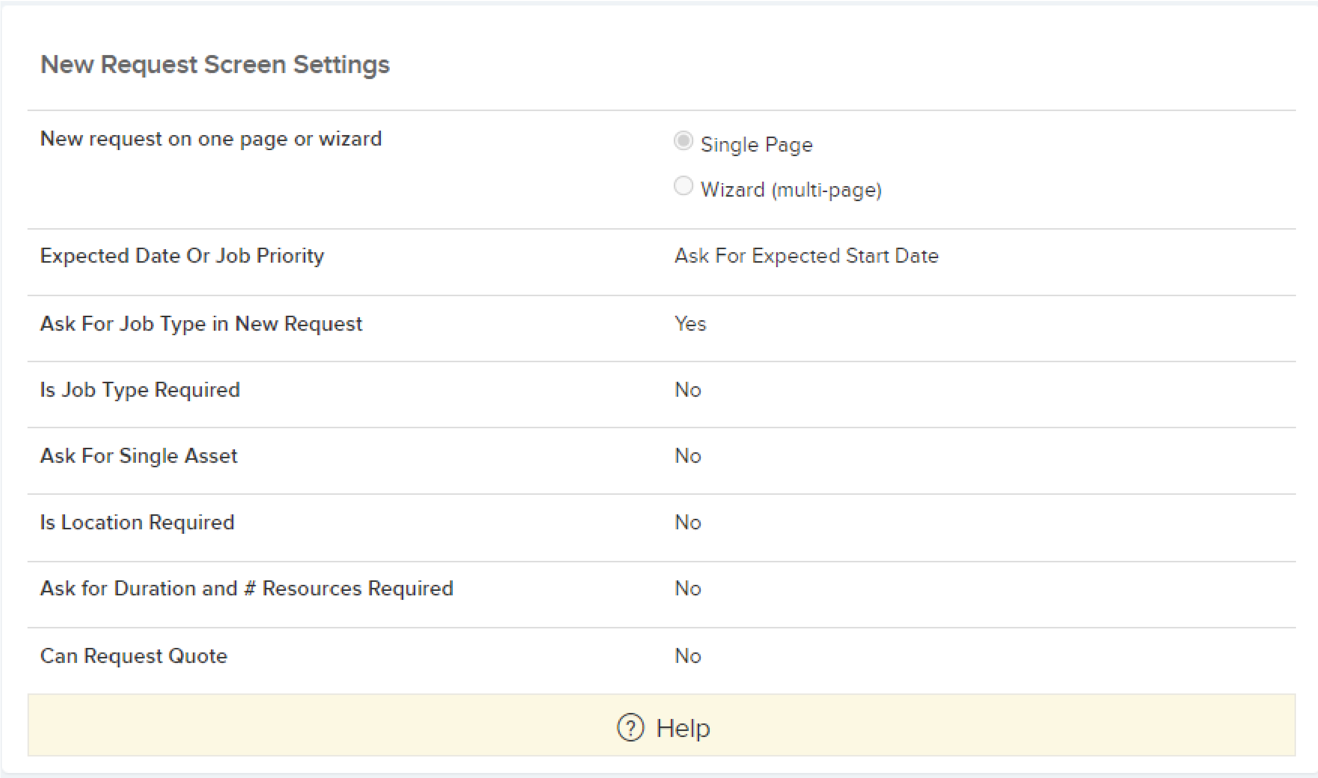
Requests can also be created by selecting the *New Request* button at the top-right of the *Requests* page:

This will bring you to the *Create a New Request* page:



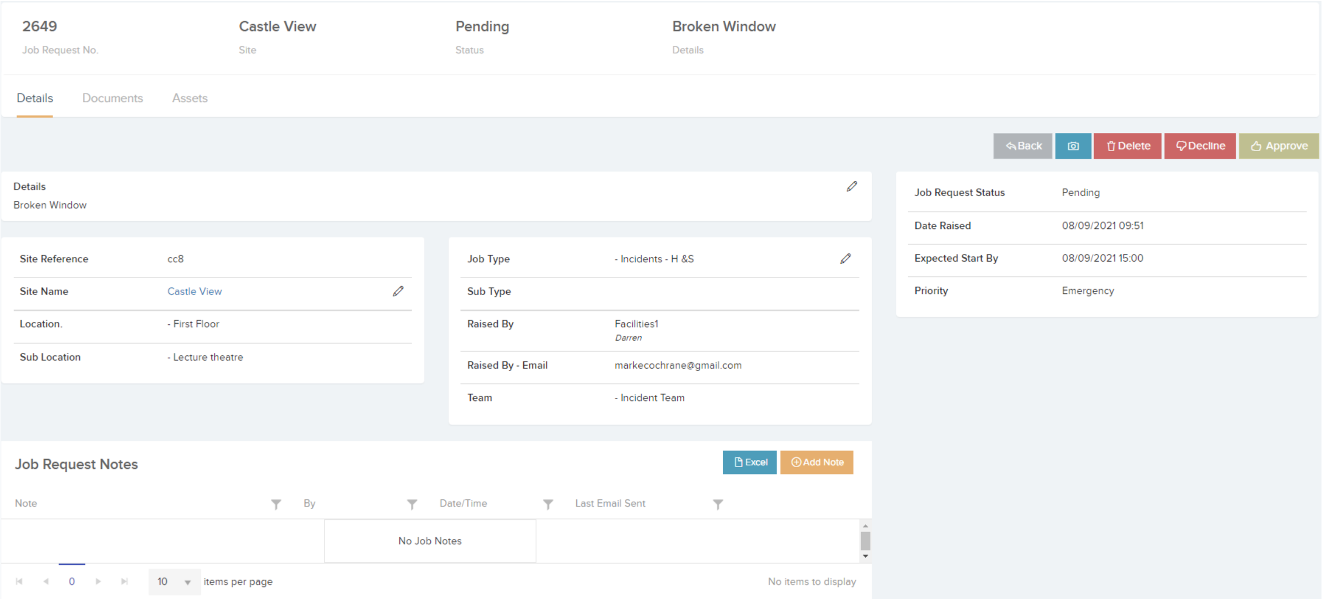
You will be asked for the job details, site name, location, sub location, job type and expected date. As a new request is being created, a list of similar recently raised job requests will appear on the right-hand side on the same screen.

The new request screen can be configured to ask for information you want. For example, you can choose not to ask for the job priority or expected date:



Job requests can also be created by sending in an email. The responsive design means that requests can be created by using a phone or tablet device with Trackplan. As soon as the request is created, then an email is sent to the client with confirmation of their new request and a new job request number. A similar email is sent to helpdesk users informing them of a new request.

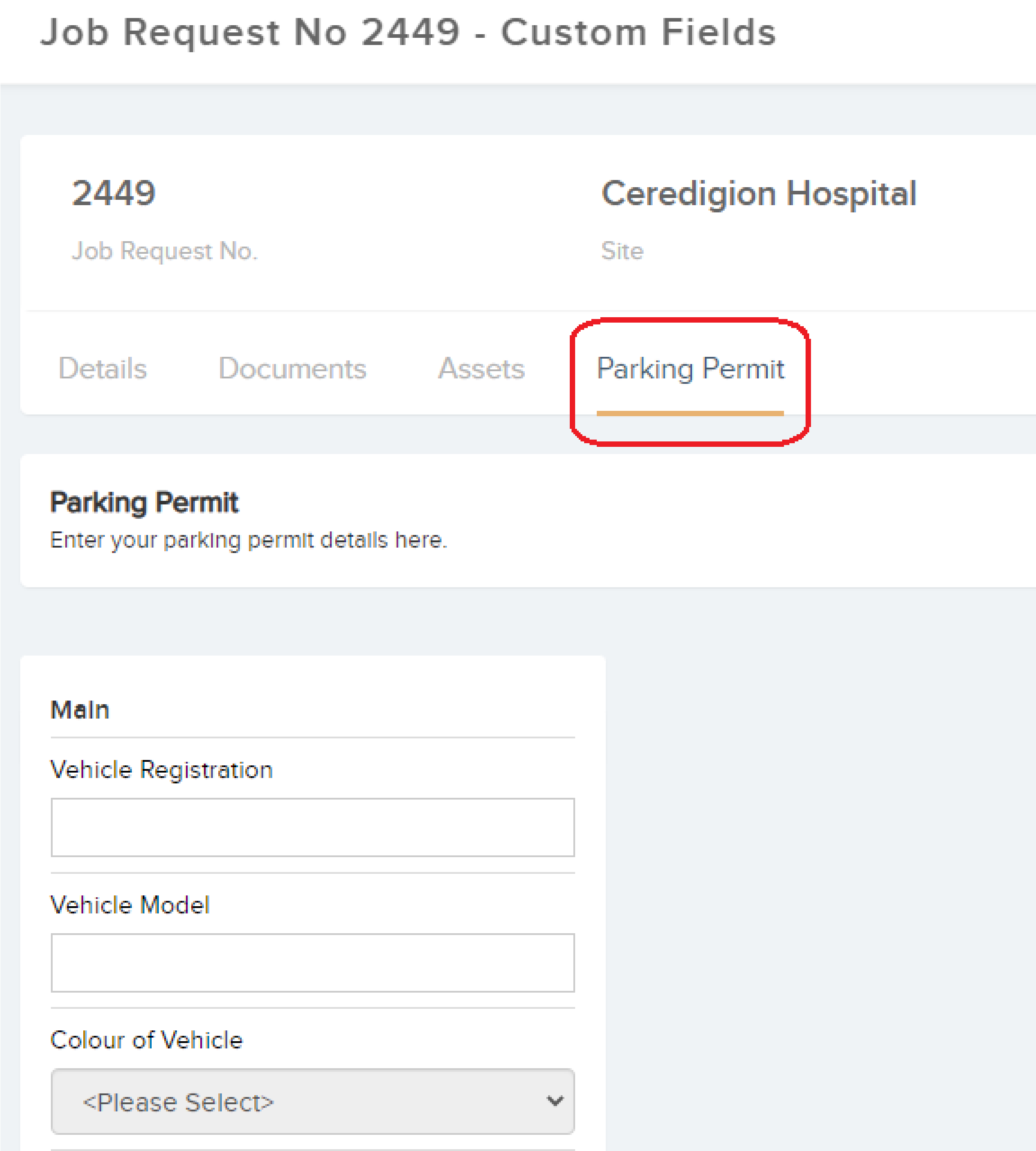
Job Request Details



Once the initial job request is created, you then have the option to add photos or documents to the job request. You can also associate the job request to one or more assets if they have been set up on the system.

Notes can be added to the job request, either at the time of creation, or later on. The user who created the request is able to follow the progress of the job requests by the helpdesk (for example: approval, completion etc.). They can also see all job requests previously made. They can be restricted to seeing only their own requests, or all job requests. You can even restrict by location

You can also ask specific customized questions dependent on the type of job request they are raising (e.g. parking permits or catering requests)



Helpdesk approval

Once the request is created, the helpdesk will receive notification of the job request by email. They can also tell from the job request list or the dashboards if there are any “pending” requests that need their approval:

Requests can also be assigned to “Teams”, which is determined by the job type. For example, the plumbing team or electrical team. Helpdesk users can then be restricted to only view requests for their team(s).

The helpdesk user can then go to the request details page and choose to Approve, Decline or Delete the request. The client will be updated in either case. The helpdesk can also send the job request for authorization by a manager before it can be approved:

Once the job request is approved, a new reactive job is created – it has the same job number as the job request. From the reactive job details page, the helpdesk user can then choose and instruct the work to a contractor or internal engineer. The job then goes through a series of steps before being completed.

The client / end user can receive email notifications on all key stages of this process. For example, once the request is approved, issued to a contractor, and of course completed. You can configure user by user what emails they receive, and you can also design the emails that get sent out including a client logo.

Further, the job request notes that they will be able to see will also keep them updated.

Feedback by client / end user on work done

Once the job is completed, the client / end user can give feedback on the work done, and either confirm it is done or reject the work done. At this stage they can also add a note. If the work is rejected, then an email can be sent to the helpdesk. The helpdesk can then take appropriate action. For example, they can reopen the job.