**UF Computing Help Desk – Remedy Tool Needs for Phase 1 (draft)**

Phase 1 needs:

* Emails to clients (where they don't see entire log history) but we still do.
* Email to 3rd party groups, with options to not have the whole log and to not have the whole log.
* Email handling including attachments that can go directly to a help desk group. However, email handling that can go to other groups.
* Email handling where emails go directly into queues or groups by email address
* Simplify form so that help desk representatives does not include level 2 tiers Need for operational and product categories to be selected (**mandatory**) before closing a request and/or referring any request. *Would like:* *Categorizations are selected easily*
* Capacity to look up clients by UFID, username or name. *Would like: Done so with 1 or 2 clicks*.
* Making contact information field mandatory.
* Preview feature to view ticket without modifying it.
* Preview feature to view where ticket lies no matter where ticket lies with option to update ticket to inform specialists that client wants update.
* Option to mark tickets in different status: pending, watch, left message, active, referred.
* Option to visibly mark tickets as urgent.
* Ability to email survey on closing requests... *Would like*: *modified if requests go straight to tier 2 or 3 groups*.
* Option to see and select templates or checklists but within organization groups.
* Self-service web portal similar to ask a question portal: clients can submit requests and include their UFID, username and contact.
* I would add ability to view ticket history for client.
* Ability to see separate lists of tickets by status (active, referred, pending, watch, left message, closed, etc)
* Ability to handle Laptop Appointment actions (with time and date of appointment) – would like: email notification to client with appointment reminder
* Reporting System: delivered weekly reports:
	+ Survey responses from clients (by group)
	+ Reports of ‘first-call resolution’ tickets submitted
	+ Reports of total incoming traffic
	+ Reports of total referred incident reports by groups
	+ Reports of total breached SLA incident reports (internal & referred)
	+ Reports of incident reports based on status
	+ Reports of incident reports filed by user
	+ Reports of incident reports filed by template types used
	+ Reports of incident reports length/time for resolutions
	+ Reports of survey responses - feedback + ratings by group
	+ Reports of incidents reports based on different categorizations

Phase 1 would like:

* Knowledge base - both public facing and internal