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How to Select Help Desk Software



With hundreds of Help Desk software packages available, how do you choose the best one for your company? When conducting an Internet search, how do you wade through the overwhelming results?

The answer is knowing the requirements specific to your company. But where do you start? This paper will guide you in determining the right questions to ask so you can formulate your requirements and select the best vendor.

Budget Considerations

There are a broad range of prices available from different vendors, ranging from free to very expensive. Begin with an idea of what your company can afford. If your budget truly is \$0, your search should start with free software. If you have even the smallest budget, concentrate on what your money can purchase and compare it to the needs of your company.

Architecture

In the world of Help Desk software, there are three basic architectural models. Each has advantages and disadvantages. Understanding the architecture is an important step in your purchase decision.

Hosted or Cloud Based

The software is leased from a vendor that provides access to it through a website. The advantage is that all server management and equipment expenses are incurred by the vendor. The disadvantage is that you do not own the software, and do not have direct access to your data. In some cases, the data ownership is actually transferred to the vendor.

On-Premises

You own and install the software on your own servers and manage the server, data and the website. The advantage is that you own everything and can access the data in order to update or change information directly in the tables. The disadvantage is that you must maintain the servers and the operational software.

Leased

Some companies provide monthly or yearly leases to use their software. The software may be either hosted by the vendor or installed on your servers. While less expensive to get started, it may prove to be a more expensive option as years pass. Make sure you understand where the break-even point is on either cloud or installed options and see if you get credit for any dollars invested if you go from leased to owned.

If you decide on the owned solution or the leased solution, check to see if the database (such as SQL) is included in the software package or if it needs to be purchased separately. Find this out early in the discovery period to see how these expenses impact your budget.



Client/Server vs. Web-Based

In the past, Help Desk software required an application to be installed on each PC before the system could be accessed and operated. These Client Side applications would update the server with any appropriate information. Client/Server installation provides an excellent way for your users to input their information and tends to be very secure and fast. However, it has a heavy price on the administration side. The application must be deployed to the users and supported like any other application on the network.

Because of the heavy drain on resources to administer this type of system, many Help Desk software providers have developed Web-based applications.

Web-based applications need only an internet browser and a URL to operate. Nothing needs to be installed on the Client's machine. Web-based packages are not limited to any particular computer, but can be accessed by any device that can access the web. People on the go can use their tablets, laptops or mobile phones to enter and respond to Help Desk tickets.

How can you tell the difference between Client/Server and Web-based in a demo?

If you are required to load software code on your desktop to begin the demo, you are not dealing with a vendor that offers a Web-based solution. True Web-based systems need only a URL for a demo.

If a vendor sends you a file for their demo, you are not seeing a 100% web-based solution. The file either loads a Client/Server system on your desktop or is a complete "canned" demo.

Make sure to properly evaluate the software you're considering purchasing. When choosing between Client/Server and Web-based, make sure the functionality is comparable.

Pricing, Terms & Conditions

When obtaining software pricing information, the key is to get a detailed quote. Vendors seeking to entice prospects with low costs may only provide summary quotes. These summary quotes may not include features that are not a part of the core solution (add-on modules), but may be required by you for your specific Help Desk needs.

For example, a vendor may tell you that their software supports Active Directory (AD) integration, but when you receive a summary quote, it may only reflect the price of the core software. You may later find out, after purchasing, that AD is one of their add-on modules. You will then need to purchase this functionality, driving your price up much higher than you anticipated.

When requesting a price quote:

- Specifically point out what you require, and make sure that what you saw in the demo is what will be quoted.
- Ask for a price sheet that lists the vendors' full range of software and add-on modules, so as your needs change you will not suffer from sticker-shock when it comes time to add additional functionality.



Pricing listed as “standard,” “professional,” and “enterprise” can be confusing and it’s difficult to tell what features are included. Many vendors offer multiple versions but only have a single demo: How do you know exactly what you are getting? Choose incorrectly and your budget takes another hit to upgrade to the “better” version.

Make sure you understand how the vendors structure their pricing. Are they offering concurrent licenses or named users? Are licenses purchased in bundles or offered individually? Are there price breaks for quantity purchases and if so, what levels are offered?

In addition, always ask for a money-back guarantee. If what you install is different than what you thought you purchased, any reputable vendor should either solve the problem or be happy to refund your money.

Understand What a License Buys

The vendor should explain exactly what a license buys. What can a licensed user do and not do? Do you need a license for everyone that needs to use the product? If you purchase 100 licenses, does that mean that only the first 100 people in your organization can access the product before you need to purchase more? Some vendors only license the technical or help desk staff and allow unlimited usage by others. Make sure the vendor explains their licensing clearly so you can fit your needs to their offerings.

Hosted Applications

If you’re also evaluating hosted applications, make sure to compare the license models offered. The hosted offerings may be different than software installed on your servers.

Make sure you understand the exact terms of the hosted contract. Are you locked in for a set time frame, such as a year, or can you terminate the agreement at any time? If the agreement is terminated, can you have your data? On many hosted applications, the data is owned by the hosting company and cannot be provided to you if you end your association. This will leave a hole in your support history and you may lose valuable information. It’s important to bring this up with the vendor representatives and understand who owns the data.

Also, request information on data security and the downtime statistics from their hosting facility. This gives you a good understanding of their reliability and safety. Find out about maintenance, when it’s performed and the type done. Understand the company’s backup policies and find out how long it would take to restore your system should data become lost or corrupted.

Customer Support and Training

Support options may generate confusion so have them fully explained.

Vendors may offer multiple support options that are based on per incident or per year. They may also offer different service levels to allow you to choose the support level that works for your company. Often the support options are related to the number of licenses purchased and may vary across providers.

Make sure that support is available when you need it, 24 hours a day, 365 days a year.



Support options may also be included a part of a subscription offering. These offerings usually bundle services such as receiving upgrades and new versions with unlimited support within one price.

No matter what provider and support option you choose, the quality of the support service is very important. If the company has a bad reputation for service, then very likely you won't be happy. You want software that accomplishes your goals with both a support and service staff that provides outstanding service to you. The best way to determine this is to ask for references and support survey results. A vendor with good support will be happy to provide the information and may offer it as part of their sales pitch. Also, if a user forum exists, you can read comments from their customers and get an idea of the type of service you will receive once the purchase is made.

Training is an important part of the implementation of any good software product. Have the vendor give you a list of training options available. Make sure you understand the cost involved. Some companies now offer video training options. See if you can preview them ahead of time to gain understanding of the quality of the videos as well as gauge the company's teaching techniques.

If possible, consider onsite training offered by most companies. This would be a good option to receive more detailed training and configuration assistance.

Another consideration is the availability of training or support assistance if you decide to run an evaluation copy of the software. Support and training at this point gives you an insight on what to expect after you make your purchase.

Product Development, Releases and Packaging

Discuss the release history with the vendor to get an idea of how quickly they add new features and improvements to their software. A consistent release history can mean the vendor is improving their product and will provide value to maintaining support contracts. Get a copy of the vendor's road map for future releases and see the approximate time.

Ask the vendor if new releases are included in your support contract. Releases that are not included in your support contract may incur large costs to you in the future.

You also need to understand how the software is packaged. Some products are all in one, so you cannot pick and choose which features are enabled. This can cause confusion if you do not need all of the capabilities. Some packages are purchased as a core system with additional modules available. In this case, you pay for the base product that includes all the basic features, but may not include major functionality such as email conversion, Active Directory integration, or asset management capabilities. This type of packaging provides you with the benefit of picking and choosing which features to invest in. Also, make sure that any module you purchase is fully integrated with the software.

Expandability and Scalability

Today's company of 50 employees can very easily be tomorrow's company of thousands. Any package purchased today needs to be flexible enough to handle any growth your company may have in the near future. Expansion can affect your decision in several ways.



Users

As your company grows, it expands its user base and as a result, your support staff grows to provide assistance. This requires that any software package purchased must have a flexible way to expand licensed users.

Scalability

The package purchased today must be able to handle the work load of the future. While you may only currently be handling 50 tickets a day, your software must be able to handle more than that minimum without needing to upgrade or change settings.

Flexibility

Some packages are geared only for Help Desk while others are designed for additional functionality. Software with the flexibility to handle other types of issues, such as Facilities Management or Customer Support, provide lower overhead and cost savings over the long run.

Vendor Reputation

Do your homework on the vendor you are selecting. The vendor reputation, customer base, and financial stability are all key factors in your decision to buy software. Ask yourself:

- Does the company have a solid financial base? Can they prove it to you?
- Are they for sale or have they been recently acquired? If they are for sale, why?
- Can they provide customer satisfaction scores on support or training?
- Can they provide references?
- Are there other customers using the product in your industry?
- What awards or recognition have they received?
- Who are the vendor's customers?

Other Considerations

Sarbanes-Oxley or HIPAA

If Sarbanes-Oxley or HIPAA affect your industry, then it will probably affect your software selection. You need to understand how the software addresses these requirements.

Source Code

Is source code availability a factor? It provides significant protection should the vendor go bankrupt, and gives you the ability to modify the software to your exact requirements. Look for a vendor that offers source code for free and has extensive experience assisting customers in doing their own unique modifications while continuing to let the customer stay on the upgrade path.

ITIL

The Information Technology Infrastructure Library provides a detailed list of recommended processes and procedures to operate a Help Desk. Any software you purchase should provide you with the capabilities to implement some of the recommended practices of ITIL. While some find that ITIL Certification is a must, others do not. Look for software that meets your company's needs and desired level of ITIL implementation.



Important Features That Should Be Included in the Software

Configurable Email Notification

Email is an important part of the notification process in any Help Desk solution. Make sure the email settings are configurable so you control when email is sent. You should also be able to control the content of the email, so you can tailor the message for your company.

Customizable System Options

Look for customizable settings within the interface itself. This usually means it's easier to configure. Software can be very complex and require the assistance of vendor personnel to install and configure it for you. This can add expense, but may be worthwhile to correctly configure and use the software you've selected.

User Management

Managing users is an important feature of any package. The availability of a large and diverse set of user permissions and abilities allows a lot of flexibility in how the users can work within the software. Some use groups to control permissions, allowing access control for many users at one time. Another important feature to look for is whether you can upload users directly into the database, saving you valuable time. One such mechanism to do that is through integration with your existing Active Directory. Some products even offer the ability to connect to multiple domains, which may be important to your organization.

Reporting

The ability to report on the data entered into the Help Desk site is just as important as the features that capture the data. Help Desk software should offer a full range of pre-formatted reports, as well as the ability to create your own reports, enabling you to provide powerful information to management. Some products will offer the ability to schedule these reports to be delivered automatically, saving time and effort.

Change Management/Process Management

You might need to manage system changes within your organization. If so, make sure your software of choice can help you to track your processes, as well as capture required documentation, notify users, and request approval from the appropriate personnel.

Additionally, you may want software that can assist in documenting processes so that you can define your process steps, determine who should handle them, and guarantee that an identical process is completed from start to finish.

As with any business decision, doing your homework now pays dividends in the future. This document is provided to help you with that homework in the hope that your decision leads you to more productive and profitable operations in the future. We invite you to consider IssueTrak as a vendor to consider when making your Help Desk software decision.