



TechExcel **ServiceWise**

Product Review Guide

Tech Excel

February 2009

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Your Invitation to Review

Thank you for your interest in reviewing **TechExcel ServiceWise** (called “ServiceWise” throughout this guide). ServiceWise is a comprehensive internal Help Desk and IT Service Management solution for optimizing all service and support processes. No matter how simple or complex a business processes may be, ServiceWise helps organizations implement ITIL best practices to maximize the value of their IT investments, improve service levels, enhance quality of service, streamline service delivery, and reduce total costs.

ServiceWise is completely modular, offers extensive customization options, and may be configured to handle any number of processes including incident management, problem escalation and analysis, IT change management, holistic asset management, service level agreements, and more. This guide offers an overview of TechExcel’s unique approach to IT Service Management and Help Desk Support and the benefits that ServiceWise delivers. We hope it will help you to write an informed review in a minimum amount of time.

Support and Additional Information

TechExcel ServiceWise documentation can provide a great deal of information beyond the scope of this guide. It is available both as online help and as a set of printable PDF manuals (see links below).

If you need fast-answer technical or any other assistance to facilitate your review, we are more than happy to help! Simply contact one of the resources below.

North America

East Coast Support
(919) 402-1386
8:30AM to 5:30PM ET

West Coast Support
(925) 871-3900 ext 4
8:30PM to 5:30PM ET

Useful Links

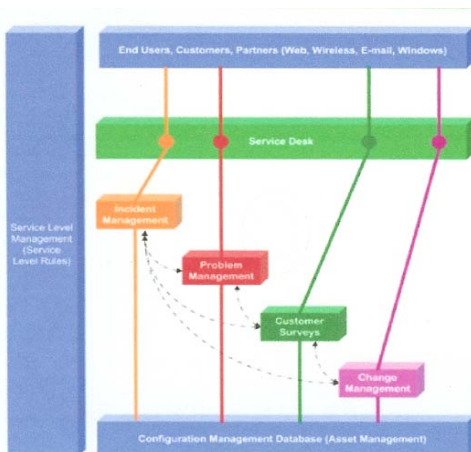
- ServiceWise Main Page:
<http://www.techexcel.com/products/servicesuite/servicewise.html>
- ServiceWise Recorded Demonstrations:
<http://www.techexcel.com/products/itsm/tour.html>
- ServiceWise Features & Benefits:
<http://www.techexcel.com/products/servicesuite/index.html>
- ServiceWise FAQ:
<http://www.techexcel.com/services/faq/servicewise.html>
- TechExcel Whitepapers:
<http://www.techexcel.com/resources/whitepapers.html>

Using ITIL To Improve IT Management

Top 10 Strategic Benefits of ITIL Best Practices

1. Provides a single, definable, repeatable, and scalable documented framework for IT best practices that flow across the IT organization.
2. Clearly identifies roles and responsibilities for IT Service Management
3. Supports reducing IT costs and justifying the cost of IT quality
4. Supports the ability of IT to measure and improve internal performance and service provisioning
5. Defines IT in terms of services rather than systems
6. Supports improvement of user productivity.
7. Improves communication and information flows between IT and organization business departments.
8. Provides a framework for IT to support regulatory challenges.
9. Improves ability of IT to adjust as business opportunities and challenges are presented.
10. Improves relationship of IT with the business – builds trust.

-- Center for Maximum Public Performance



Business today can not run without efficient and effective IT service management nor can they survive without reliable IT services. However, providing and continually improving those services is a daily challenge for IT professionals aiming to keep up-to-date with the changing needs of their customers and users. The IT infrastructure Library (ITIL) is a comprehensive set of best practices for effectively managing IT services and is rapidly becoming the de-facto framework for organizations of all sizes.

ServiceWise is the ideal choice for companies interested in improving IT service management with ITIL best practices. It's flexible business process modeling and a unique project structure allows organizations to carry out business and IT initiatives using their own processes. Additionally, the flexible framework within ServiceWise allows ITIL and other business processes to be managed from a single, scalable solution.

ServiceWise can be scaled to provide the following ITIL specific process management features which can be customized to meet the specific needs of any organization:

- **Incident Management:**
ServiceWise focuses on achieving the best levels of availability and service to effectively minimize disruptions and maintain normal business
- **Problem Management**
ServiceWise enables business to effectively handle the adverse impacts of incidents and problems and prevent similar future issues
Note: Organizations using ITIL best practices and ServiceWise can begin improving incident management and problem management processes simultaneously, out of the box.
- **Change Management**
ServiceWise allows business to manage risks and plan for the inevitable changes appropriately with a structured approach allows businesses to standardize change processes and coordinate teams
- **Configuration/Asset Management**
ServiceWise provides IT managers with a thorough understanding of the dependencies that exist between the components, hardware, software, networks and users within an organization
- **Service Level Management**
ServiceWise empowers an organization to manage the entire SLA lifecycle: from defining agreements and monitoring compliance to analyzing performance information and addressing problem areas

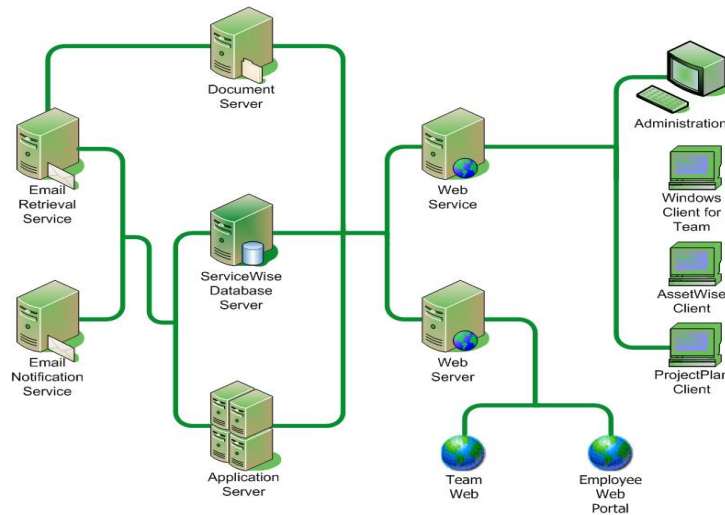
The ServiceWise Architecture

"I would definitely recommend ServiceWise because of the flexibility of the admin module, the ease of customization, and the openness of the database which allows access to the data so we can create reports and integrate with other tools. We really needed a tool to manage all of our incidents and this tool is really able to do the job. I dreamed of a system and I found it in ServiceWise."

-- Francois Caron, Director of Support,
Recruitsoft
(Renamed Taleo in 2004)



ServiceWise consists of six core components: the ServiceWise Database Server, the ServiceWise Application Server, the ServiceWise Document Server, the ServiceWise Web Service, the ServiceWise Administration Console and one or more ServiceWise Windows clients.



- **ServiceWise Database Server:** Accepts connections and stores data. TechExcel solutions run on any ODBC-compliant database.
- **ServiceWise Application Server:** Acts as a gatekeeper between the data stored in the ServiceWise Database Server and the clients and services that access that data.
- **ServiceWise Document Server:** Enables organizations to attach files to support tickets and to upload and download files from the knowledge base. Both the ServiceWise client and ServiceWise Web Server use the ServiceWise Document Server to access files including file attachments, e-mail attachments, and knowledge items.
- **ServiceWise Web Service:** Connects to the ServiceWise Application Server and the database server directly, and manages requests from the ServiceWise Administration Console and Windows Clients.
- **ServiceWise Administration Console:** Connects to the ServiceWise Application Server and database server through the ServiceWise Web Service. Using the ServiceWise Administration Console, system and project administrators may configure, customize, and manage multiple ServiceWise projects.
- **ServiceWise Windows Client for Team:** Connects to the ServiceWise Application Server and data store through the ServiceWise Web Service

"The features ServiceWise offered exactly met what we were looking for. Because ServiceWise has been so flexible and easy to configure we were able to use this tool to discipline our business processes. I appreciate TechExcel's support and continual refinement of this application even as they pursue aggressive development of other front office applications. With this kind of synergy the sky is the limit as we implement future enhancements of this product."

-- Greg Ortega, Customer Support Systems Administrator, Palomar Technologies



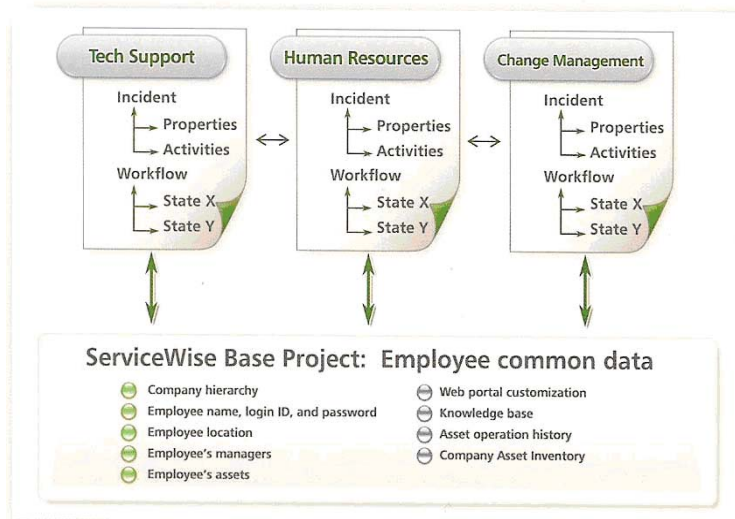
ServiceWise Basic Concepts

In ServiceWise, system administrators are responsible for installing and configuring ServiceWise sites, configuring system wide settings, defining user accounts and user account properties, and assigning licenses to ServiceWise users.

Project administrators define what is tracked in a project, how it is tracked, and who may track the data. Project administration tasks may be broken into four inter-related areas: project definition, ticket definition and GUI customization, project member administration, and workflow administration.

ServiceWise uses the "project" concept to represent and manage company, employee and support management processes. In ServiceWise, each project represents a distinct area of work and is controlled by a set of administrator-defined workflow rules.

There are two types of ServiceWise projects: Base Projects and Work Projects. A Base Project enables businesses to store and manage employee data and knowledge. A Work Project includes the workflow and all business rules for a specific process. Every work project supports bi-directional communication. This means that incidents or requests submitted in one project may be copied or moved to another project, at any time.



Base Projects

A Base Project contains any data that can be shared across work projects. One example might be an organization's LDAP or Microsoft Active Directory synch settings. ServiceWise supports both standard and secured LDAP synching to any LDAP server.

Employee, customer or end-user information is also held in a base project. This means users only have to input or synch information once and then can chose to share it amongst multiple work projects.

"It's a very flexible product that allows you to do whatever you want. If you want to design a workflow, you can do it. If you want to notify people in a particular way, you can do it. If you want to integrate a document or an attachment, you can do it. If you want to use specific reports, you can do it. I would definitely recommend ServiceWise. The product is extremely flexible so you can design it in the way you want to provide you with the results you want. ServiceWise is extremely flexible, but it's also very powerful."

-- Yinon Eliaz, Manager of Customer Services Americas, XACCT Technologies



Knowledge is another function that is stored in the base project. Any document or file added to the knowledge base of ServiceWise may be accessible from any or all work projects associated with that base project.

Assets are also held in the base project. Desktops, laptops, cellular phones, software installations, parking permits, etc may be logged and tracked using TechExcel AssetWise, an asset management software that integrates with ServiceWise.

Work Projects

Work projects contain the workflow as well as all business rules associated with a business process. Users can create an unlimited number of work projects but still maintain bilateral communication between them. This is just one of the many robust features found within ServiceWise.

ServiceWise project members are also contained with a work project. Each work project may have its own autonomous business rules, workflow, and users contained within a single data source. Settings for the self-service portal are contained within a work project. Each work project may have a dedicated portal or multiple work projects may share a single portal or ServiceWise supports a combination of both.

The graphical workflow is also part of a work project. One popular workflow setting is "support applicable owners." This setting allows users to determine, on a state-by-state basis, who can own a particular incident. For example, if a ticket is an application support, an organization may not want someone from networking to be the owner of that ticket.

The Self Service Portal

Designed to increase customer satisfaction and improve overall service desk efficiency, the Self Service Portal offers a convenient, on-demand method for reporting incidents. Organizations can now provide around-the-clock support by providing a portal with a searchable index of knowledge to assist customers and self-service problem solving.

All pages of the self service portal are fully customizable. Organizations can add their own logo; add, remove or rename section headers; and reveal as little or as much information to their customers as they choose.

The incident list shows all incidents that have been reported for a customer. It does not matter if the ticket is submitted through the portal or they call the support center. The incident will still appear when that customer logs into the portal. Customers can show all open, closed or open and closed incidents. Being able to view closed incidents gives the customer the ability to see historical tickets, along with their solutions. So, if the customer has a recurring issue, they can see how it was resolved in the past and potentially fix their own problem.

The Submit New Incident window shows all options the customer has for submitting incidents. Incident templates are used to help guide your customers. Organizations can pre-assign priorities, auto-route specific types of requests, or just speed-up the submission process by using incident templates.

Team Web Client

With the ServiceWise Team Web Client, team members are able to perform impact analysis, prioritize the severity, escalate urgent issues, route items to specialists for quicker resolution, and submit necessary change requests. ServiceWise provides the features that allow IT teams to restore normal service operations quickly when incidents and problems arise.

Incidents may be sorted by employee or customer, incident owner, incident status, or a custom query may be defined by a support analyst. The status page shows the current status of an incident and who the incident has been assigned to, which can be either a person or a queue. The work history or technical comments section can also be viewed, along with a scrolling dialogue of comments regarding the incident. Also visible is the SLA, which includes the incident assigned date, start date and anticipated resolution date.

Integrated Knowledge Base

A centralized knowledge base helps support teams reduce repetitive support tasks and empowers users to find answers by themselves. Resolved incidents, self-service support topics, HTML links, files attachments can be easily categorized and indexed in ServiceWise. Its robust indexed searching capability, full text and keyword searches of the knowledge base quickly return documents, ranked by relevancy. Resolved incidents can also be published as new knowledge items to help resolve similar incidents in the future.

Robust, Out-of-the-Box Features

Top 8 Reasons for Choosing ServiceWise

1. Develop repeatable, measurable, documented and enforced processes
2. Develop more knowledgeable and efficient staff through better prioritization, process automation and user self-service
3. Create a high quality of service at a reasonable cost
4. Quickly identify and resolve infrastructure incidents before they disrupt the business
5. Automate reminders, review tasks and approvals throughout the lifetime of any incident or request
6. Deliver on-demand support 24/7 with the end-user portal
7. Seamlessly integrate incidents or requests, forms, downloads, knowledge and reports; all accessible by a single link
8. Create a fully customized GUI for both technicians and end-users

Designed with flexibility and ease-of-use in mind, ServiceWise provides an out-of-the-box solution for the total visibility and actionable intelligence organizations demand for all service desk, asset management, and customer support business processes.

Its configurable workflows, customizable user interfaces, flexible business process automation, email notifications, and intuitive knowledge management improves communication and allow team members to collaborate on inter-departmental related incidents, problems, changes and requests.

The industry's best Employee Web Portal

The easy-to-navigate personalized web portal gives employees a convenient way to communicate with the IT services and help desk departments. The TechExcel Employee Web Portal improves employee satisfaction and IT service desk efficiency and virtually eliminates the risk of data errors caused by manually transferring information from employees to support engineers.



"We diligently reviewed a number of help desk applications on the market and we came to the conclusion that TechExcel Help Desk was the best of breed; a year later, we still hold to that belief."

David C. Yavorsky, CIO, First American Mortgage Information Services



Fully customizable user interface

Fully customizable interface allows organizations to design fields and forms to suit their specific business needs – without waiting for high-priced consultants to do the job. Administrators may configure which Incident Tabs will display in the interface and the order in which they appear. Furthermore, the Administrator may choose to make the Standard View a common view shared by all users or allow individual users to create their own view preferences.

ServiceWise Business Benefits

Holistic support process

All support incidents and emails are tracked from submission to resolution, workloads can be easily balanced, workflow rules are enforced, and overdue or stagnant incidents are auto escalated.

Productive employees

Employees can access the Web portal any time and anywhere to submit new requests, check their incident status, engage in further Web conversations with support staff, and resolve many of their own issues by searching the knowledge base. Incidents are resolved quickly. The satisfaction survey guarantees that employees' voices are being heard. Employees enjoy higher morale and productivity.

Reduce IT support costs

With the workload properly balanced and the self-service portal used by employees, the support costs can be reduced significantly. Identify and remove bottlenecks to further improve support effectiveness.

Management stays informed

Management can easily gauge the support team's performance and find out the areas that cause most of the problems so they can be addressed.

Boost the company bottom line

Happy, productive employees create happy customers. With lower support costs and increased employee productivity, employee satisfaction is improved and the company's bottom line is boosted.

ServiceWise Smart Screens reduce form clutter and simplify the end-user interface by creating different forms for different types of incidents and user requests. Smart Screens enable the data fields and form layout to change dynamically based on the Incident Type being submitted. With Smart Screens, Administrators may design more user-friendly forms and ensure data captured is relevant to the type of issue being submitted.

Smart Screens also enables the capture of appropriate data throughout the entire lifecycle of the incident. Different form layouts and data fields may be created using a drag-and-drop tool for the initial Submit Screen form, Description Page form, Current Status Page form, all Custom Page forms, Forward Page form, Close Page form, and the Reopen Page form.

Incident tracking and resolution

Track all incidents and problems with full audit trail throughout the resolution lifecycle. Each record contains the documents, knowledge-topics, links, email threads - and more - for a holistic view of the entire help desk lifecycle. Incident tracking and resolution can be easily customized to meet an organization's unique business requirements

Auto-Escalation

Escalate incidents or problems based on a combination of categories and time criteria including: elapsed time, no progress made, open too long, or due date approach/passed. Each escalation rule can be associated with a company work schedule. This allows organizations to define specific escalations for both emergency situations that require 24 hour escalation and standard work hour escalations for less urgent incidents. Work schedules are customizable and include: work days and work hours (including lunch periods), holidays, and time-zones. There are no limitations on the number of work schedules or escalation rules that may be created.

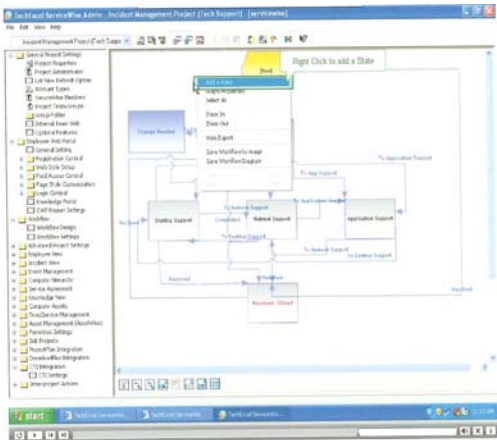
Auto-Routing

Automatically route incidents and problems to an appropriate team member by expertise, availability or a combination of both. Incidents can also be automatically routed to a group folder, state or priority depending on business rules.

Workflow-enabled email management

Automatically route employee email to appropriate support staff and track the entire correspondence history. TechExcel Outlook Sync provides Microsoft Outlook users the ability to interact with TechExcel ServiceWise data from directly within Outlook.

The TechExcel Outlook Sync adds additional buttons to the Microsoft Outlook interface making it easy for IT users and support technicians to synchronize activities performed within Outlook to ServiceWise. Synchronizing email communications, activities, and tasks from Outlook to ServiceWise improves both user efficiency and visibility.



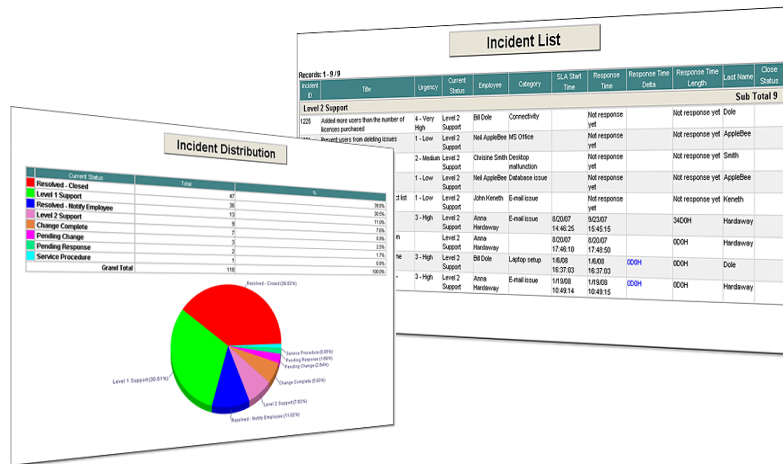
In order to configure ServiceWise for your work processes, you simply use a point-and-click workflow editor to add states and transitions.

Complete incident workflow

Automatically assign new issues to the most appropriate person based on their skills and workload, then trigger automatic notifications when issues are overdue. Service Wise supports the ITIL framework by seamlessly integrating incident management processes with problem management and change management processes.

Built-in reports and analysis

Over 150 pre-defined presentation-quality reports and graphs with the power to easily create additional custom reports with Crystal Reports™. Reports can be saved, on a per-user basis using a simple reporting configuration page, and printed or exported to Excel. Clickable graphs and charts also let users navigate from a high level view of data to more detailed listings to help use data more effectively in decision making and data analysis.



Microsoft Active Directory Password Reset

Users may reset/change their Active Directory password using TechExcel password reset forms. For each changed password, a closed incident will be created allowing service managers to report on total number of incidents being automated by reset feature. Current industry averages show that this will reduce number of calls to service team by approximately 30% for substantial ROI.

Integrated knowledge management

Complete knowledge base management helps a support team reduce repetitive support tasks and empowers users to find answers by themselves.

Add-on Modules to Extend Capabilities

"ServiceWise helps us to be more productive, which makes my life easier. It is a very user friendly, feature rich application. I frequently receive calls from potential ServiceWise clients and I always recommend the product."

-- John Selters, Acting Vice President of Technical Services, TriTech Software

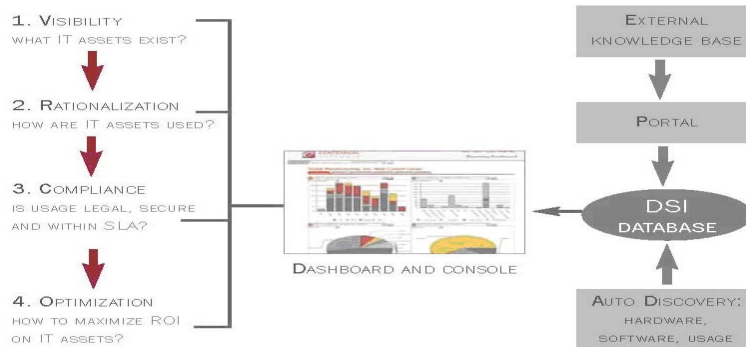


For added flexibility and even more robust functionality, TechExcel offers add-on modules that seamlessly integrate and enhance the power of ServiceWise:

AssetWise:

A single and centralized location enables an organization to monitor all assets important to its mission including company-owned IT assets, managing asset inventories, and tracking both customer and employee-owned assets..

The integrated asset management capabilities of AssetWise helps optimize all asset-related processes during an assets lifetime, from purchasing through implementation to service upgrades and returns.

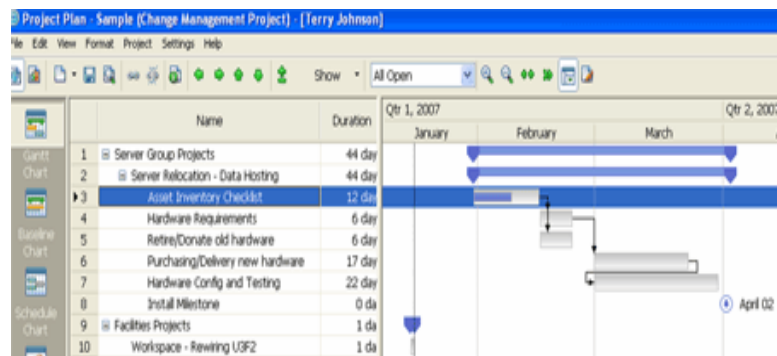


AssetWise Discovery:

Provides automatic asset discovery of network devices, hardware, and software. AssetWise Discovery integrates with AssetWise inventory management and ServiceWise service management applications to provide complete information for an organization's IT service team.

ProjectPlan

Provides integrated project planning and resource management for IT managers and service teams. ProjectPlan gives managers complete control over project information, scheduling, and resource management through its real time integration with TechExcel ServiceWise.



KnowledgeWise:

A centralized knowledge base for all company documents including: contracts, processes, planning information and other important records as well as customer-facing articles, FAQ's, technical manuals, how-to guides, and installation guides. All documents contained within KnowledgeWise are subject to administrator-defined, controlled-access.

FormWise:

Create fully customized online forms and integrate them directly with your workflow processes. The integration of workflow and form processing enables streamlined data gathering, tracking, and form storage. Forms can even be routed automatically to the appropriate individuals for completion, approval, and processing, improving a team's efficiency.

DownloadPlus:

An easy-to-use website management application for monitoring and controlling file downloads. All downloads including patch releases, virus updates, user guides, manuals and any other type of files needed by employees/end-users are controlled from a single, user-friendly management console. DownloadPlus improves sales lead generation, lead qualification, and software delivery.

Wireless Web

Provides the ability to open, close, update, and forward incidents and opportunities from anywhere while all data is synchronized with the central database. Users may also use the mobile portal to engage in web conversations remotely.

Service Level Agreements:

Provides complete service level agreement management capabilities to the service delivery team. This comprehensive service level agreement solution allows users to easily configure and administer service plans for employees/end-users.

Active Directory/LDAP Synchronization:

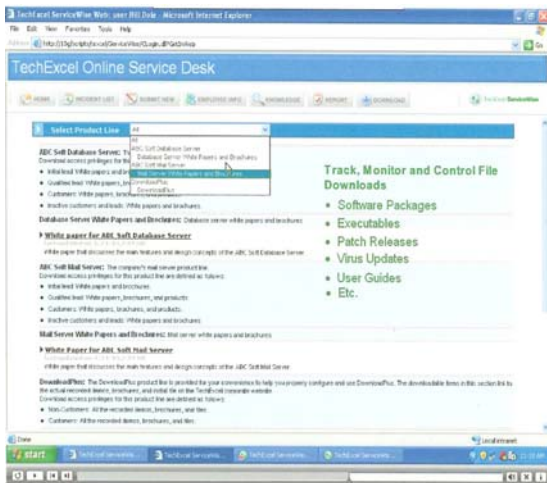
Sync employees/end-users as well as support team members directly into ServiceWise with the LDAP Sync Module. The Sync Module also supports secure LDAP connections.

CTI Data Connector

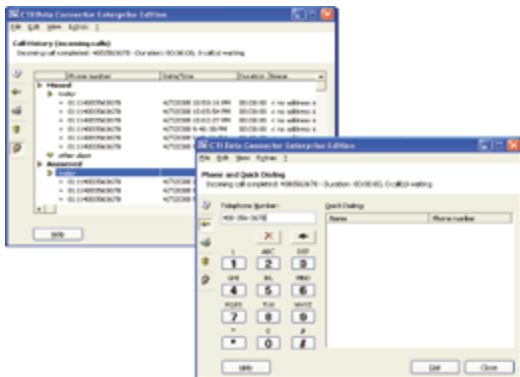
Provides service engineers and sales agents on-screen telephone interfaces, one-click dialing, and incoming and outgoing call event automation. The CTI agent allows service and sales users to view current call-queues and missed calls.

DevTrack Integration

Optimize the important relationship between customer support and development without sacrificing the autonomy of either organization. It's the ideal solution to manage the whole lifecycle of an issue from its reporting by the customer to its resolution by the support and development teams.



DownloadPlus improves sales lead generation, lead qualification, and software delivery



TechExcel CTI Data Connector provides integration between ServiceWise and existing phone system infrastructure

Technical Information

ServiceWise Pricing

TechExcel Corporate

Founded in 1995

First Product, DevTrack, shipped in 1996

100% Privately owned

Over 1500 customers in more than 43 countries

TechExcel locations
Corporate Headquarters –
Lafayette, CA

East Coast Sales and Support Office
– Chapel Hill, NC

Asia Pacific Development and
Support – Beijing, China

EMEA Sales and Support –
London, UK

Supported Browsers

- Internet Explorer 5.0 or higher
- Netscape Navigator 5.0 or higher
- Mozilla Firefox 1.0 or higher
- Apple Safari 1.0 or higher
- Opera Desktop 9.0 or higher

Supported Databases

- Microsoft Access 2000/2003/2007
- Microsoft SQL Server 2000/2005
- Microsoft SQL Server Express 2005
- Oracle 9/10
- Other ODBC Compliant DB

Server Specifications

- Windows XP/NT/2000/2003
- 2.0 Ghz Processor
- .Net Framework 2.0 or 3.0
- 512 MB Ram (minimum)
- 30 GB Partition Size (minimum)
- IIS 5.0 Server 5.0 or higher
- ServiceWise requires approximately 2-3 MB per 1K incident records

Virtual Server Support

- VMWare Server
- VMWare ESX

Workstation Specifications (Optional)

- Intel Pentium 4 class processor or higher
- 512 MB RAM (minimum)
- 250 MB Free Hard Drive Space
- Windows NT Workstation/2000 Professional/XP/Vista

Test Drive

You can access a running installation of TechExcel ServiceWise at <http://trylive.devsuite.net/scripts/texcel/servicewise/clogin.dll/>. We provide the following login names and passwords for demonstration purposes:

Login Name	Password	Role
ahardaway@abccompany.com	anna-h	Executive Mgr
bdole@abccompany.com	bill-d	Department Mgr
csmith@abccompany.com	chrisine-s	Employee
dmontana@abccompany.com	damon-m	Part time Emp

Each employee has a different privilege set as defined by the helpdesk support. The main differences between the predefined roles in the table above are explained briefly below.

Executive manager: Can edit own employee info, edit employee contact type, view report, search knowledge, submit incident, edit own incidents. As a power user, can view all incidents for all sites.

Department manager: Can edit own employee info, view report, search knowledge, submit incident, edit own incidents. As a power user, can view all incidents in the department.

Employee: Can edit own employee info, search knowledge, submit incident, edit own incidents.

Part time employee: Can search knowledge, submit incident, edit own incidents.

You are also welcome to download a copy of TechExcel ServiceWise, install it, and take it for a test drive (you will have access to all features). You can download the latest release at <http://www.techexcel.com/download.html>.

Your will need to register in order to download the files.

You may find these downloadable PDF documents useful which are available on the download page:

- ServiceWise Guide for Installation and Evaluation-- One Zip File
- ServiceWise-DevTrack Installation and Integration Guide
- TechExcel ServiceWise Admin Guide
- TechExcel ServiceWise User Guide
- TechExcel ServiceWise Employee Web Portal Quick Start Guide



Thank You

On behalf of the entire TechExcel team, we would like to thank you for your time and your interest in reviewing TechExcel ServiceWise

Remember, if you have any questions or need any assistance to facilitate your review we are more than happy to help. Please don't hesitate to call or e-mail us!

Technical Contact Information

North America

East Coast Support
(919) 402-1386
8:30AM to 5:30PM ET

West Coast Support
(925) 871-3900 ext 4
8:30PM to 5:30PM ET