

United Methodist Communications

Discovery: Ticketing Integration with Training Portal

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EXECUTIVE SUMMARY	1
CURRENT PROCESS REVIEW.....	2
SOFTWARE CANDIDATE.....	2
ANALYSIS.....	2
AWESOMESUPPORT.....	2
<i>Features</i>	3
JIRA SERVICE DESK.....	5
<i>Features</i>	5
DEVELOP TICKETING SYSTEM	5
<i>Requirements</i>	5
CONCLUSION	6

Executive Summary

Over the past year or so the Web Ministry department has utilized SmartSheets and email to organize user support tickets. Upon reviewing our current process there is a need for a more accurate and faster approach — tools that will help move us into the right direction to better answer every ticket and provide support to our customers. In this document, I will share my analysis of two applications that we can look into incorporating as our go-to ticketing system for the Training Portal. Furthermore, will share their features, pros and cons and end with what my recommendation which is AwesomeSupport to start out, unless we really need tickets to be automatically created and need SLAs, then Jira Service Desk would be the option.

Current Process Review

The tools that we are current utilizing can be improved. As you might sense from seeing the list below that we are using too many mediums just to manage tickets;

- SmartSheets
- Email
- Training Portal Support Form
- Azure DevOps

Software Candidate

AwesomeSupport — WordPress Plugin (Free). <https://wordpress.org/plugins/awesome-support/>

Jira Service Desk — Free - \$10/mo for up to 3 users on the base package. <https://www.atlassian.com/software/jira/service-desk>

Develop Ticketing System

Analysis

The ticketing system, AwesomeSupport, has a lot of potential to helping us better serve our customers and improve our overall handle of tickets. When we have a better handle on support tickets and requests the better our system will be and the happier our customers. Before diving into the pros and cons we need to look at this from a birds-eye-view of the purpose and goal of the ticketing system should be.

The main purpose of providing a ticketing system to work in conjunction with the Training Portal. The Training Portal already provides content to our customers to help them quickly find solutions to every day problems that arise in managing content in Sitecore. However, we need a way to handle feature requests, bug fixes, and questions and be able to create a report of common questions. With our current medium we have too many avenues that we have to go through in order to manage these requests and things can get really messy fast when we depend on just emails.

In the rest of this analysis, I will break down the features that the candidate provides and list the pros and cons.

AwesomeSupport

This candidate is one that is definitely budget-friendly as it is a free plugin that we would install in our WordPress instance of our Training Portal. We know that having everything in one place is the most ideal solution, so let's take a look at features that AwesomeSupport has to offer.

Features

Awesome Support is the result of three+ years of work, research, and improvement. It is probably the most powerful helpdesk and support ticketing plugin on the planet. Whether you're a startup that needs just the basics or a major corporation with multiple departments requiring service level agreements and sophisticated ticket routing, we have the functions you need! Seriously – just take a look at all the features you can get (some free, some premium)

General

- Unlimited Tickets (Free – Core)
- Unlimited Agents (Free – Core)
- Unlimited Users (Free – Core)
- Unlimited Products (Free – Core)
- Unlimited Departments (Free – Core)
- Unlimited Tags (Free – Core)
- Unlimited Custom Priorities (Free – Core)
- Unlimited Channels (Free – Core)
- Unlimited Custom Statuses and Labels (Premium – Custom Status)

Attachments

- Attach multiple files to tickets (Free – Core)
- Control which file extensions are allowed for uploads (Free – Core)
- Control the maximum file size allowed for uploads (Free – Core)
- Drag and Drop files for upload (Free – Core)
- Paste images from clipboard to create files for upload (Free – Core)
- Store files in most cloud services (Premium – Filestack/Filepicker)

E-Commerce

- Synchronize product lists between Awesome Support and WooCommerce (Free – Core)
- Synchronize product lists between Awesome Support and Easy digital downloads (Free – Core)
- Validate Envato licenses before tickets can be submitted (Premium – Envato Validation)
- Allow users to open tickets directly from WooCommerce (Premium – WooCommerce)

- Allow users to open tickets directly from Easy Digital Downloads (Premium – Easy Digital Downloads)
- Agents can view key order and custom e-commerce status directly in the ticket (Premium – WC and EDD)

Pros	Cons
<ul style="list-style-type: none"> ○ Unlimited Tickets ○ Free, and also has a Premium version to add more features such as ○ End User reply ticket ○ Unlimited Agents ○ Premium Packages include automatic FAQ article suggestion for a ticket submission 	<ul style="list-style-type: none"> • Premium Packages to extend usability to improve ticketing system. • According to WordPress, this plugin hasn't been tested with the latest 3 major releases of WordPress. It may no longer be maintained or supported and may have compatibility issues when used with more recent versions of WordPress. • Tested up to Version 5.0.9 (Currently on 5.4.1).

Jira Service Desk

Atlassian makes this product that provides everything that AwesomeSupport has to offer, but comes at a cost: \$10/user/month for up to 3 agents for Cloud or Self-Managed plans.

Features

Jira's features cover these areas: Request Management, Incident Management, Problem Management, Change Management, Asset Management and Knowledge Management. You also have the ability to extend the application with tools such as Slack, Salesforce, Trello, and many more. I've looked into integrations with AzureDevOps, but haven't found anything too promising.

Pros	Cons
<ul style="list-style-type: none">○ Unlimited Tickets○ Run reports to identify metrics such as the number of incidents associated with a problem record, top problems per month, and more.○ Link problem tickets to incident tickets to identify any recurring issues and start investigating the root cause.○ Set up custom automation rules or use built-in rules to handle all manual tasks. (e.g. Escalate, assign, prioritize,○ Self-service portal○ Service Level Agreements (SLAs)○ Knowledge Base○ 200+ Integrations○ Smart search – Machine learning○ Possibly be able to use this for free according to their price sheet on Cloud.○ 30 day trial on Self-Hosted servers	<ul style="list-style-type: none">○ No integration with Training Portal, this would need to be a separate entity.○ Costs Free — \$10/month for up to 3 users then jumps to \$80/mo+ for Cloud○ Costs \$10 one-time payment for up to 3 agents for Self-Managed, or \$2400 one-time payment for 5 agents.○ Cloud has 2GB storage○ Limited automation executions for up to 100 executions per month.

Develop Ticketing System

There are advantages to developing our own ticketing system such as we get to define the requirements for the system, build it in-house, and integrate it with the Training Portal to meet our goal. Although, when there are advantages there are also some disadvantages.

Requirements

- Integrate with Azure DevOps
- Discovery of Azure DevOps API in correlation with how it can be integrated into the Training Portal
- Allow emails to be sent within the system (incoming and outgoing) for ticketing notifications
- Ability to create a new ticket on the frontend and add them to the WordPress Dashboard
- Create priorities for each ticket
- Track responses on the Training Portal (both frontend and backend users).
- Create ticketing portal on frontend for the users
- Membership Maintainability
- Create login interface
- Create buckets for New Tickets, Opened Tickets, In Progress, Closed, Resolved
- Ability to notify the original ticket recipient to receive updates on the state of the Azure DevOps ticket that is attached to their original submission
- Ability to attach real-time updates of Azure DevOps tickets to a ticket

Pros	Cons
<ul style="list-style-type: none"> ○ Save Money ○ Built our way ○ Developed in-house ○ Integrated with Azure DevOps (hopefully) ○ Ease-of-use for both end users ○ Users will be able to track the progress of their submissions if it's a feature request or bugfix. 	<ul style="list-style-type: none"> ○ Time of research and development ○ Not really a fast approach to getting this to the user as this will take time. An estimated 3-6 months

Conclusion

At the end of the day we want to lower costs on the ticketing system but allow this program to improve daily tasks. Installing AwesomeSupport is not only beneficial from a pricing standpoint but has a lot of features that we can utilize out of the box. Another plus to using this plugin is that it stays in one place. However, if we are going to continue utilizing emails my recommendation would be to move to Jira Service Desk Self-Managed and host this ourselves. We can always run a trial on these two applications to see which one is best suited for what we are looking for. Since we are looking for a more integrated system with the Training Portal AwesomeSupport wins, but when it comes to providing alternative channels for users to submit their tickets and provide SLA's Jira Service Desk would be the way to go as well.

In addition, the approach to going the route of developing our own ticketing system to integrate with the Training Portal will definitely take some time. If we do decide to go down this road there needs to be a lot of research, planning, and development work that will need to take place. First and foremost, we need to research what this entails from an API standpoint, what membership will need to look like on the front-end, and how will both frontend and backend users interact with the platform? These things will need to be well thought out and planned before diving into designing and developing such a platform to ensure that it fits our needs and the purpose of why we need an integrated ticketing system.