Technical White Paper

yurbiconnect Email to Service Desk Automation

Seamlessly integrate unstructured email data with leading ticketing systems.

Help requests come into the service desk in various forms – direct entries into a ticketing system, email from an end user, phone calls, web forms, and more. Automating even just one of these functions can save service desks countless hours and greatly increase accuracy and efficiency. Drawing on the power of the Yurbi® Business Intelligence platform, Yurbi Connect was designed to meet the unique needs of Service Desk teams in handling email requests.

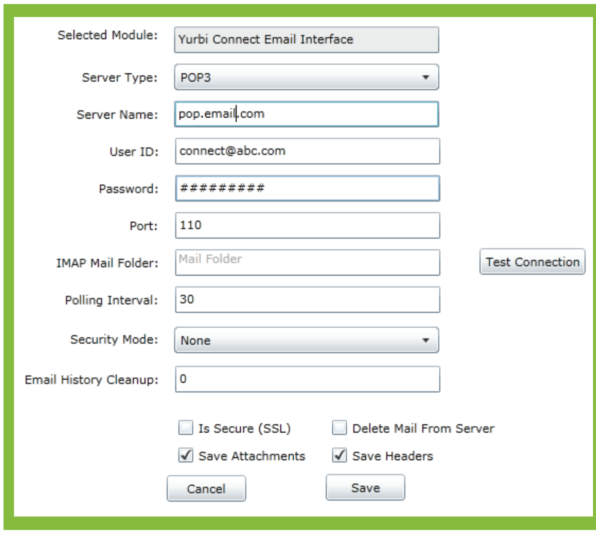
How it Works

Yurbi Connect allows for direct integration of email into Service Desk software through configuration, not coding. This saves considerable time and cost compared to the alternatives of writing custom scripts or coding, implementing complex and limited out of the box vendor tools, or implementing expensive third party integration tools.

Using a 100% web based interface, Yurbi Connect allows for the extraction of information out of emails and the application of an intelligent workflow to transform that data into the proper format needed to create new tickets or modify existing tickets in a Service Desk system.

Yurbi Connect provides a simple three-step process that can integrate both structured and unstructured email.

Step 1: Configure. Configure access to a POP3 or IMAP email account and Yurbi Connect will download and break emails into Component parts: To, From, CC, Subject, Body, and even the Header information and Attachment Names. This breakdown provides an additional side benefit of making email data available for data mining via the Yurbi BI Platform to help detect and understand trends in emails coming into the Service Desk. With Yurbi Connect there is no limit to the number of email accounts you can configure.



Yurbi Connect supports both POP3 and IMAP email access and can be configured to support multiple security modes. Settings can be configured per your organization's preferences, including deleting processed emails, saving attachments, and polling interval.

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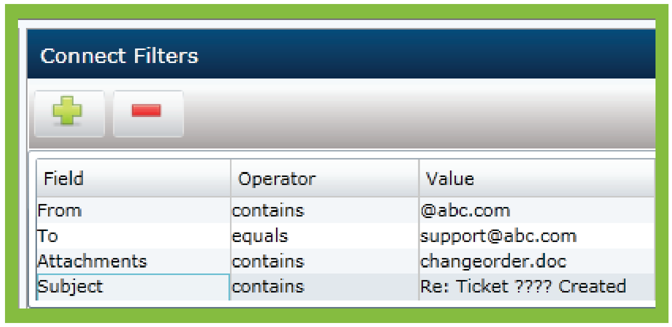
Step 2: Define Triggers. Define triggers in Yurbi Connect to determine which emails are important to take action on. This step is very similar to defining Microsoft® Outlook rules. A trigger can be a combination of any of the email fields defined above.

Examples of triggers include:

- **Users from a Specific Email Domain**
  (From: Contains @abc.com)
- **Sent to a Specific Email Account**
  (To: Equals support@abc.com)
- **Attachment Names**
  (Attachment Name: Equals changeorder.doc)
- **Ticket Notification Replies**
  (Subject: Contains "Re: Ticket 3450 Created")
- **Structured System Notifications**
  (Subject: Contains "System Down Alert")
- **Unstructured Keyword Search**
  (Body: Contains "Printer")



Any number of triggers can be created to match the specific email types and processes in an organization.

Step 3: Create a Connection. A Connection is the workflow definition that connects the incoming email with the Service Desk system to create new tickets or modify existing ones. The Yurbi Connect Workflow process is a drag and drop interface that is designed specifically for data handling. Similar to mapping out a flow chart, simply drag and drop flow chart icons onto a canvas, connect them, and configure each one. Elements of the workflow include:

- **Email -** the Email icon is the starting point for all workflows, this represents all the detail contained within the incoming email.

- **Extract –** the Extract icon allows you to parse the email out so that you can extract exactly the elements needed for the ticket creation. For example, if the Subject line is "Re: Ticket 3456 Created" the extract icon can be configured to parse out the 3456 and use that for updating the correct ticket number. Multiple extraction methods are included out of the box and additional methods can be added with ease.

- **Lookup -** the Lookup icon is used to do a web services call to the Service Desk and return the correct values and reference IDs for contact data such as userid and user organization as well as service desk data such as Priority, Area Code, Status, and more. A common use for the lookup function is to validate that the person sending the email is in fact a defined contact in the Service Desk system. Lookup is also very useful for setting values such as Priority, Status, Assignee, and others.

- **Conditional -** the Conditional icon is the classic Decision/Branch point and allows for the application of logic in the workflow. It takes the value provided as its input and applies a simple validation to determine if it matches or doesn't match. Based on the results, the data is moved in different directions in the workflow. Following the example above, if the contact is not defined in the Service Desk system then a new branch can be followed with creates a ticket using a default userid or alternatively the processing can be stopped completely depending on your internal process of how to handle unrecognized emails.

- **Default -** the Default icon is used to set specific values for Service Desk fields. Default can be used in the situation if all other Conditional Decisions failed and a Default value is provided to continue the workflow. Default can be set to assign Service Desk values like Priority, Area Code, Assignee, Group, and more.

- **Stop -** the Stop icon is used if you want to do nothing more with the email. This can be useful if you get spam or "out of office" replies that do not need to be logged into the system. It is also useful if the decision tree reaches a point where it is determined the email is invalid and shouldn't be processed further.

- **Transform -** the Transform icon allows you to properly format text by trimming extra characters or blanks spaces from inputs or appending two inputs together to make a complete set of information to add to a ticket. As an example, the Transform icon is useful for appending to the description field of an existing ticket.

- **Log Comment -** the Log Comment icon is used if you want to log a comment in the activity log or work info of a ticket. This is very useful when you determine that an existing ticket is already open and instead of creating a new ticket, you can simply log a comment to the existing ticket.

- **Ticket Search -** the Ticket Search icon is an endpoint to the workflows and provides a ticket lookup facility to see if an existing ticket already exists. This is a powerful component to determine if a new ticket should be created or an existing ticket modified. Ticket Search can combine multiple ticket values to pinpoint if a prior ticket exists for the new email.

- **Ticket Modify -** the Ticket Modify icon is an endpoint to the workflows when you wish to modify an existing ticket versus creating a new one. Within the Ticket Modify, assign all the values coming from the workflow into the proper ticket fields. You can append or replace fields or alter the status, assignee, or other values in the ticket.

- **Ticket Create -** the Ticket Create icon is an endpoint to the workflows and determines exactly how the new ticket will be created. Within the ticket create, select if you are creating an Incident, Request, or Problem and also assign all the values coming from the workflow into the proper ticket fields.

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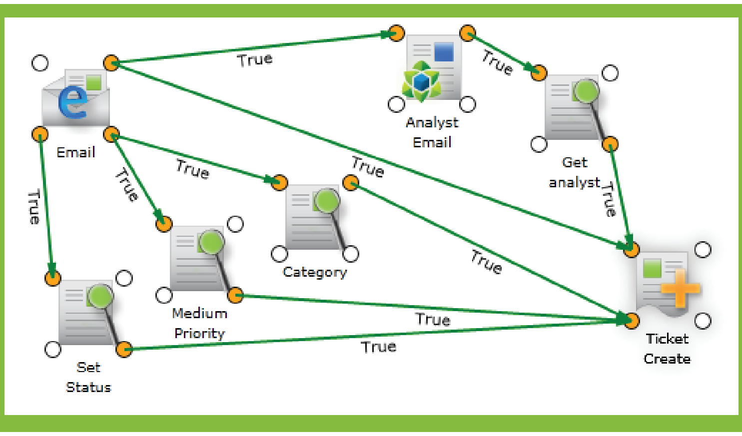

These 3 steps are done through a drag and drop interface. Using an intuitive, graphical interface, administrators can design the workflow needed to properly handle any kind of help request without the need to write one line of code. The Yurbi Connect workflow allows users to drag and drop the elements of the workflow chain and assign specific attributes to each step through drop down lists.

Solving Service Desk Headaches

- **Multiple service emails –** for desks handling corporate help calls as well as customer service requests on multiple email queues, Yurbi Connect is able to pull all of these disparate sources into a single location for management. Yurbi Connect is able to understand how the email arrived and the proper workflow needed to automate it.

- **Responses to "do not reply" emails –** no matter how clear it is, people will always hit reply on automated emails as a matter of convenience. Change "Do not reply" to a "Please reply" request with Yurbi Connect. Connect can grab responses and automatically log them into the original ticket entry, ensuring every custom communication is captured.

- **Change Management approval –** if a chain of approvals is needed to make a change to a system, an email can be sent out and managers can reply directly to the email with approval as opposed to having to log into a separate system. This speeds approval processes as now approvals can be easily gained from people on the road through an email. Yurbi Connect grabs these email responses and automatically enters the needed data into the change management system to enable the change.

- **Duplicate Ticket issues -** for automated system integrations that create multiple tickets for the same incident, Yurbi Connect can provide the intelligence to determine if an existing ticket is already open and log a comment as new emails arrive.

- **Tight Service Level Agreements (SLAs) –** meeting Service Levels Agreements are critical, especially when penalties are involved. If Service Desk Analysts are unable to access the system to acknowledge assignment of a new ticket, that can be costly. With Yurbi Connect, analysts can reply to service desk notifications and update statuses and log comments without worrying about complicated response syntaxes.

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Why Yurbi Connect?

- **Minimize human data entry time and errors through automated ticket creation**
- **Increase speed of responses**
- **Increased SLA compliance**
- **100% Web-based creating a small infrastructure footprint**
- **Intuitive interface and anywhere access**
- **No coding needed with graphical workflow creation**
- **Focus on flow chart configuration not coding makes the Connect solution more intuitive than ETL tools baked into large vendor solutions**

Technical Specs

Yurbi Connect Integrates with:

Service Desk Systems
- CA® Service Manager r11.x, r12.x
- BMC® ITSM v7.x
- More Coming Soon….

Email Systems
- Any POP3 or IMAP compatible system

Yurbi Connect is available as a stand-alone product or as a part of the Yurbi Platform where it is integrated with advanced BI functionality and reporting. For more information about Yurbi and Yurbi Connect please visit www.yurbi.com.

About Yurbi

Yurbi accesses multiple data sources and securely pulls together information into easy to understand reports, charts, and dashboards that give new insight into what is driving business outcomes. Yurbi brings the powerful reporting and analytical capabilities of traditional Business Intelligence solutions, but takes out the coding jargon – so that people can actually use it themselves.

Contact Sales Today for a Free Trial

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