



Work Ticket Creation Guidelines

Brad Larkin
The Weston Group
May 19, 2009, version G



Purpose

- Present basic knowledge of creating a clear and correct Work Ticket.
 - Work ticket in this presentation refers to a Support Request in the AutoTask system.
- Answer Frequently Asked Questions about using Work Tickets.



Topics

- Work Ticket Requirements – The 5 Ws
- AutoTask Details
- AutoTask Tips
- FAQ



Topics

- Work Ticket Requirements – The 5 Ws
- AutoTask Details
- AutoTask Tips
- FAQ



Work Ticket Requirements – The 5 Ws

- Who
- What
- Where
- When
- Why



Who

- Client Name (Account & Contract)
 - Entered in the Ticket Header
- Client System
 - E.g. GPMS, <client> Intranet, office printer
- Client Contact Info
 - This info is usually included in the Ticket Details
 - User's Name
 - User's Telephone
 - User's Email



What

- What was user doing? Can the process be duplicated?
- What was the error generated or phenomenon encountered? Get the error codes or message prompts even if you don't know what they mean.
- What is the business purpose of this application / activity? Is it tied to any other software or services?
- If the task is a report or information request, be specific in *what* information and *what* format is desired.
 - E.g. List of patients with CPT code 99999 from 1/1/2004 to 12/31/2004 for provider 012.

Where

- Where is the user & application operating?
 - Physical location of user (e.g. remote office)
 - Server name, location, URL, etc
 - Specific web page, document, or file in use. Include URL / UNC path to file whenever possible.
 - Where, in the application context did error occur?
 - E.g. on update, when creating a new record, at the start-up/shut-down, etc.

When

- When did the error occur?
 - Has this error occurred before, and if so, how often does it reoccur?
- When does this need to be resolved from a business perspective and from the user's preference?
 - This will often determine the Ticket's priority.

Why

- Not always possible to learn but invaluable in aiding our speed and efficiency.
 - Often tied in with What the patient was doing or When the error occurred.
- Bad Doctor Metaphor
 - Without the Why we are like bad doctors, playing guess-and-test with our patients' well-being, possibly curing the symptoms rather than the problem.
- Beware the self-diagnosing patient.

Topics

- Work Ticket Requirements – The 5 Ws
- AutoTask Details
- AutoTask Tips
- FAQ

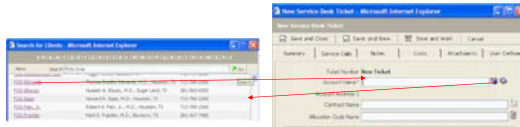
AutoTask Details

- Header
- Client Contact
- Description
- Assigned To Responsibility
- Due Date & Hrs
- Priority
- Status
- Issue Type

You might open another browser window and create a new AutoTask ticket right now to follow this outline.

Ticket Header

- Create a new ticket using the *New Service Request* button on the AutoTask toolbar.
- Enter the client account, contract and business information as best known. This is important because all Weston work is billed to specific entities based on these selections.
- A pick list of Accounts is available using the first icon on the right hand side of the dialog.



Client Contact

- Select the client contact from the drop-down menu.
- If the person is not already in the system, add their contact information to AutoTask with the "Add Account Contact" button on the right.



Ticket Description

- The next part is the most important – describing the **What** and **Where** that needs to be addressed.
- A good description explains the current situation, describes why the situation is not satisfactory and has a *Ticket Title* that tells us what to do.



Assigned To Responsibility

Specific Departments or work teams may have specific instructions for routing issues and making assignments. In general, we want to use AutoTask queues as work containers or 'in-boxes' for specific work tasks.

Assigning to a queue has a number of benefits in the AutoTask system. The ticket will remain traceable in that queue even as the work is assigned to an individual and the supervisor can more easily distribute the workload.

A ticket may be assigned to both a queue and a user.



Queue Assignment Policies

- **TWG Development Software Support**
 - Issues involving Weston software, reporting, and code changes should be assigned to the *TWG Development Software Support* queue.
 - Do not assign an individual user on these tickets.
- **Application Support**
 - Issues involving help, training, or application troubleshooting of Electronic Medical Records (EMR), Claimpoint!, GPMS, or other 3rd party, non-Microsoft applications used by a client should be assigned to the Application Support queue.
 - Do not assign an individual user on these tickets.

Queue Assignment Policies - 2

- **Network Support**
 - Issues involving server administration, systemic Internet connectivity, routers and other network issues should be assigned to Network Support queue.
 - Do not assign an individual user on these tickets.
- **Desktop Support**
 - Issues involving individual PCs, printing problems, login problems, antivirus, Outlook, MS Office, etc.
 - Do not assign an individual user on these tickets.

Due Date, Hours and Priority



- **Due Date**
 - The date that the client needs the project or task completed by.
- **Estimated Hours**
 - The projected number of hours required to complete the ticket.
- **Priority**
 - Priority indicates the urgency and how many Weston resource should generally be used.
 - Put another way, it indicates whether other issues should be put on hold based on this ticket.

Priority Guidelines



- **Critical**
 - An important, existing client system is not functioning and is disrupting many user job tasks.
 - Task needs to be fixed within minutes or hours.
 - Calling someone in overnight or from vacation is appropriate.
 - Note that a backup job cannot be critical as it does not disrupt users jobs.
- **High**
 - The task pertains to a heavily used client system or an important client business issue or client decision maker.
- **Medium**
 - Task pertains to a normal events and does not inhibit client users from doing their job. 75% of our tickets should probably be at this priority.
- **Low**
 - Issue has no impact on client users' job function or low business impact for the client.

Status



- **X%**
 - Percentage of work complete on the ticket based on your current best estimate.
- **Follow Up**
 - The work has been performed and the client has been notified, however the client's satisfaction has not been confirmed
- **Help Desk**
 - The job is being handled at the help desk level and was not escalated to IT, programming, or management
- **Waiting Parts**
 - The job requires components not yet provided by another Weston employee or is waiting on another project to be completed first.
- **Waiting Customer**
 - The job requires components not yet provided by the client
- **Complete**
 - The task officially complete.
 - When you're ready to mark the ticket complete, always notify:
 - item creator,
 - account manager,
 - anyone who provided major assistance on the ticket

Issue Type



- **Executive Issues**
 - Use *TWG-JWS* for executive issues that should be raised at the senior management level within the Weston Group.
- **Marco's Clients**
 - Use *MVG* for clients specifically overseen by Marco Gonzales, namely HENT, Hillcroft, CRC, ...
- **Others:** do not select an issue to the ticket unless you have special guidance to do so.

Topics



- Work Ticket Requirements – The 5 Ws
- AutoTask Details
- **AutoTask Tips**
- FAQ

AutoTask Tips



- Attachments
- Internal Notes
- Ticket Notes
- Notifications

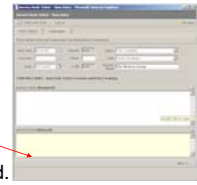
Attachments

- Attachments may only be added from the "Edit Ticket" section.
 - Select the "Attachments" tab to see existing attachments and add new ones.
 - You can select an existing attachment by clicking the paper clip or by right-clicking and choosing the options from there.
 - You can add a new attachment by selecting "New" then "Attachment" then browsing for the file on your drive.
 - Be sure that you have your web browser configured so that AutoTask is part of the *Trusted Sites* security zone.
- Are a good way to store Screen Shots and other helpful information which the user has communicated.



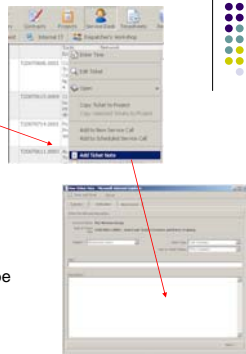
Internal Notes

- Entered in the text box below Summary Notes when work descriptions and billable time are entered.
- Appear in green color when you display Ticket History.
 - Display must be enabled in your viewing options.
- Use Internal Notes when making intra-company commentary regarding entered time.
 - Including technical details,
 - computer code
 - speculation
 - forward looking statements ("I'll upload the file tomorrow")



Ticket Notes

- Use basic ticket notes when you want to add a documentation note without entering billable time on a ticket.
 - Right-click on the ticket and select *Add Ticket Note*
 - Documentation
 - Internal Communication (can be sent as a Notification)
- Text appears in blue color when you review a ticket history.

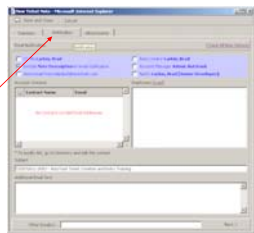


AutoTask Notifications

- Notifications include a brief message by the user followed by a copy of the ticket information. These messages are stored as Notes within the ticket.
 - Documentation. The notification sent is stored in the AutoTask ticket and thus available to all persons who read / work on the ticket.
- Guidelines
 - Use Notifications when forwarding tickets to a new person, making significant alterations to a ticket that is not your own.
 - Use Notifications when working on a long term project to notify others of any major status changes.
 - Always notify the ticket creator and account manager when closing a ticket.

Notifications (cont)

- Efficient
 - Provides a way to send an email to other Weston Employees in the same step that you work on a ticket in AutoTask.
 - Can be used when entering:
 - Summary Notes with billable time
 - Ticket Notes
 - Forwarding a Ticket
 - Simply click on the Notification tab




Topics

- Work Ticket Requirements – The 5 Ws
- AutoTask Details
- AutoTask Tips
- **FAQ**

Frequently Asked Questions



- **How do I find a ticket?**
 - Go to "Service Desk", select "Tickets" from the left column, and enter in appropriate search information. This should bring you a list of all tickets ever created that match your criteria.
- **Who decides who gets a newly created ticket?**
 - Departmental managers normally distribute tickets or determine the policy of how tickets are assigned within their groups. Thus, the key point in creating a ticket is to assign it to the most compatible queue.

FAQ II



- **Is a new ticket necessary for every piece of work I do?**
 - The decision of whether incidents is up to your manager. Generally, once you get efficient at creating tickets, creating the ticket is just as fast as writing notes on paper.
- **Can I create an AutoTask issue by simply cut-and-pasting a Central Notification alert into a new ticket template?**
 - Very unlikely that you would be creating a very good ticket. Only if the notification included the 5 Ws.

FAQ III



- **Do we bill the client for the administrative time of creating a ticket?**
 - No. We do not bill the client for administrative time for things like:
 - Time to enter the ticket in AutoTask
 - Time to take and hand off a Help Desk call to another Weston technician.
 - We do bill for technical assistance to a client such as:
 - Troubleshooting and Investigation
 - Assistance with using a computer, application, or report

Questions for You?

