

# Work Ticket Creation Guidelines

## Quiz, version F

The Weston Group

Your Name: \_\_\_\_\_ Date: \_\_\_\_\_

What are the 5 Ws of work ticket creation? (write a one word description for each)

1. \_\_\_\_\_ 4. \_\_\_\_\_

2. \_\_\_\_\_ 5. \_\_\_\_\_

3. \_\_\_\_\_

6. Where would you enter ticket instructions which we don't want to print on the customer's invoice? (circle one)

- a. With the *TWG – JWS* Issue option.
- b. In the Ticket Title field
- c. In the Internal Notes block
- d. There isn't a section in AutoTask devoted to this function.

7. What should the *Issue Type* be on tickets that senior Weston executives should be aware of? (circle one)

- a. *Computer Problem*
- b. *TWG – JWS*
- c. There isn't one.

8. How do you add an attachment to an AutoTask ticket? (circle one)

- a. Edit the Ticket
- b. Go to the file upload page of AutoTask
- c. AutoTask does not have an attachment feature.

9. In documenting a ticket, why is it important to cover all of the 5Ws in the ticket? Please explain.

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10. If the client contact who's called you is not listed in AutoTask, what should you do when creating a ticket for this person's problem? (circle one)

- a. Pick someone else who is already in the system so that when the ticket is escalated, that technician will contact the wrong person.
- b. Leave the contact blank. Can you be blamed for not taking the initiative?
- c. Add the contact to AutoTask and then select them on this ticket.

Match the AutoTask ticket Status below to it's correct description by entering the letter for the correct option:

<u>Your Answer</u>	<u>Status</u>	<u>Options</u>
11. _____	50 %	<b>a.</b> Work on the job is on hold; awaiting another project to be completed first.
12. _____	Waiting Parts	<b>b.</b> The job requires components not yet provided by the client.
13. _____	Waiting Customer	<b>c.</b> Task is complete and client satisfaction has been confirmed.
14. _____	Follow Up	<b>d.</b> The work has been performed and the client has been notified, however the client's satisfaction has not been confirmed.
15. _____	Complete	<b>e.</b> The job is being handled at the help desk level and was not escalated to IT, programming, or management <b>f.</b> Work is 50% complete on the ticket based on your current best estimate.

16. What are some good reasons to use an AutoTask Notification message? (circle one)

- a. When forwarding a work ticket to someone else to work.
- b. To let others know about status updates on a ticket.
- c. To let the ticket creator know that the task is complete.
- d. To let the account manager know about an issue with his or her account.
- e. All the above.

Which of the following activities at The Weston Group should be billed to the customer?

(Answer True / False to each)

- 17. \_\_\_\_\_ Troubleshooting a user's report.
- 18. \_\_\_\_\_ Time to enter a service request ticket in Auto Task
- 18. \_\_\_\_\_ Assisting a user with using a software application.
- 20. \_\_\_\_\_ Time spent taking a phone message and finding someone to work a Helpdesk telephone call.