



The TOI Ticket Category

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There is a specific M-Theory customer, The Oncology Institute, for whom two custom ticket templates have been made. These two templates cover the two possible kinds of contacts that could be received from TOI callers. These two types of contacts are:

1. **Service Request**

- a. A Service Request is logged to record work that must be completed, but which is not related to a break/fix situation. An example might be an office that needs a new computer because they have added a new desk, or a scheduled meeting where IT will need to set up or take down equipment on a specific date, at a specific time. *A Service Request is never used if something is broken.*

2. **Incident Request**

- a. An Incident request is logged to record work that must be completed because something has been broken. An outage at a work site, or hardware that is impaired or not functional would be logged under an Incident request. *An incident request is never used for scheduled maintenance.*

When logging a ticket for The Oncology Institute, first determine whether the customer is calling because something is broken and must be repaired, or whether the customer is calling to request that maintenance or other non-break/fix related activities take place.

Once you have made this determination, click the "Ticket Category" drop down menu. This menu defaults to the selection "MTG Client." Instead, select the ticket template that correctly reflects the customer's request. Incident tickets will be logged under the "TOI Incident Ticket" template. For service requests, select the "TOI Service Request" template.

Note that this must be done not only for tickets manually created as the result of a phone call, but also for tickets that are received from other sources, such as email. This process also applies to triage. Part of the triage process involves reviewing ticket fields to ensure that they are correct. To triage a ticket from The Oncology Institute, select the correct ticket template for TOI, then fill out the additional fields, before assigning the ticket to the correct technician. Each template has fields that are specific to that type of request.

As a special note, the priority of "Critical" is available only on the Incident template, not on the Service Request template. This is because the priority of critical is always considered a break fix situation, never a service request. Do not use the service request template to log a critical ticket.

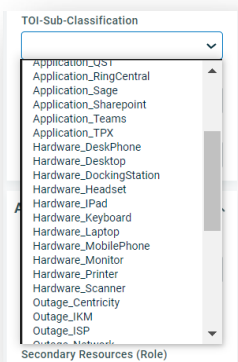
The screenshot shows a software interface for creating a ticket. The 'Ticket Category' dropdown menu is open, displaying a list of categories. The categories listed are: Datto RMM Alert, Datto Alert, Datto Networking Alert, Sales Engineer Request, Customer Onboarding, [MTG] Standard, [MTG] Audit, Internal Employee Onboarding, TOI Incident Ticket, and TOI Service Request. The 'TOI Incident Ticket' and 'TOI Service Request' options are highlighted with red boxes. A red arrow points from the 'Ticket Category' dropdown to the 'TOI Incident Ticket' option.

The additional fields available under these templates are located here, in the TOI Specific Fields section. Both of the TOI ticket templates have a section for TOI specific fields. However, the fields themselves differ, with one template displaying incident-related choices, and the other template displaying service-request-related selections.

The screenshot shows the 'New Ticket' form in a software interface. The 'TOI Specific Fields' section is highlighted with a red box. This section contains four dropdown menus: TOI-Classification, TOI-Sub-Classification, TOI-Component, and External Ticket Number. The 'Tags' section is also visible, showing a text input for 'Add a tag...' and buttons for 'Suggest Tags' and 'Organize by Group'.

In both templates, select the fields from the top down. Pictured here the TOI Classification, TOI Sub-Classification, TOI Component, and External ticket number fields from the TOI Incident template. The TOI Service Request template has fields of TOI_SR_Type, TOI_SR_Subtype, and TOI_SR_Component, but they work the same way. Both templates have the External Ticket Number field.

Notice that the selections available in this menu are divided into four subsections that correspond with the four selections available in the TOI Classification section. Please make certain that the Classification and Sub-Classification fields match. Then, select the TOI component.



Finally, review the External Ticket Number field.

A screenshot of a form field labeled "External Ticket Number". The field is a simple text input box with a light gray border and a light gray background.

The Oncology Institute has their own, internal Help Desk, which uses a ticketing system called Zen Desk. Although we have no direct visibility of these client-side tickets, the customer might still refer to a Zen Desk ticket number. This is especially true if the ticket is being generated from an email message. This field may be left blank only if no number has been referenced by the client. If there is a Zen Desk ticket number present in relation to the request, it must be placed into the External Ticket Number field.

When working on the ticket, please follow all of the standard processes that are in place for all other tickets for all other clients, including filling out any non-customized fields. The customized fields are to be completed in addition to the standard fields, not as a replacement for them. This includes the fields of "Issue Type" and "Sub Issue Type" which will continue to be used for reporting purposes.

Please direct any questions about this training material to your manager or supervisor. Thank you for reviewing this training document, and remember to work smart.