Standard Operating Procedures for Track-It Work Orders

Contents

Creating a Work Order 1
Checking a Work Order 3
Updating a Work Order 4
Completing a Work Order 5
Subtypes and Categories for Service Requests 6
Sample Track-IT tickets 7
    Service Request – Virus 7
    Classroom and Event Support – Setup 8
    Classroom and Event Support – Equipment Loan 9
    Purchase – Print Credits 10
    Purchase – Microsoft Office 11

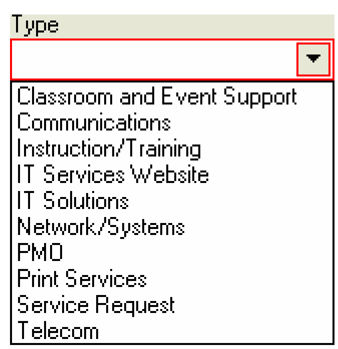
Creating a Work Order

Open Track-IT and go to the Help Desk section. To create a work order, select Add work order from the Tasks column in Track-IT. Please fill out all fields that you have information for and try to collect all relevant information as appropriate from the requestor or a supervisor. Multiple requests or requests with multiple due dates, such as a series of CES setups, should have multiple tickets filed and then assigned to the appropriate technicians. See specific steps and descriptions below.

1. **Enter the requestor's name** *(Required)*
   Most faculty, staff, and student names are already in the database. You can enter the name by entering the beginning of the last name and selecting the completion out of the drop-down list. If the requestor is in the database, Track-IT populates their contact information when available. Confirm with the caller that the information we have in the system is correct (location, phone number, etc.). If you find an error or omission in this information, send an email to the Help Desk at helpdesk@hws.edu.
   If the caller is not in Track-IT, select one of the Unknown designations:
   "Parent-Unknown", "Staff - Unknown", "Faculty - Unknown", "Faculty - Emeritus", "Hobart Student-Unknown", or "William Smith Student-Unknown".

2. **Summarize the service request**
   Enter a concise but descriptive explanation of the issue or request. The details go in the Description field.

3. **Select the Type of request** *(Required)*
   Choose the closest match for the type you need. If you are unsure, ask a supervisor or coworker. If you are unable to determine the Type, select Service Request only.
   See the section "Subtypes and Categories for Service Requests" for details about choosing types for requests.



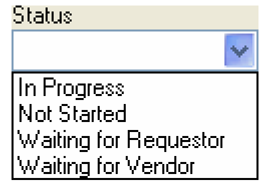
4. **Select the Subtype**
   The Subtype options that appear will depend on which Type you selected in the previous box. Be sure to fill out this box as accurately as possible so that the service request is routed to the appropriate team.
   See the section "Subtypes and Categories for Service Requests" for examples on available subtypes for requests.

5. **Select a Category**
   The Category field helps to narrow down the type of service request even further. These drop-down fields are also used for completing the work and creating reports later.
   Even if you are unsure of the exact nature of the problem, try to categorize it as appropriately as possible; these fields can be changed once the issue is diagnosed and can be more properly categorized.
   See the section "Subtypes and Categories for Service Requests" for details on available categories for requests.

6. **Set a priority level**

Priority	Description
Urgent	Completed within 6 hours (Presidential/Trustee requests)
High	Up to 24 hours
Medium	24 to 72 hours
Low	Up to 1 week turn around
Project	Open ended or far future dates (1, 2, or 3 months)

7. **Status field**
The status field lets us know whether a service request is in progress, waiting on information from the requestor, or not yet started. This field should be updated as the status changes, for example, from during initial diagnosis to waiting for a call back from the requestor with background information.



8. **Record how we were contacted**
Keeping track of how we are contacted (phone call, walk-in, email, etc) will help us see how our customers prefer to notify us of an issue, enabling us to be better prepared to receive communications and manage staffing patterns.

9. **Technician Assigned**
In many cases, the Technician Assigned field will be automatically filled in based on your selections to previous boxes. Change the Technician Assigned field to your name when you are the person who will actually be fulfilling and completing the service request. All work orders should be originally assigned to a group, not an individual.

10. **The Date Assigned field**
The Date Assigned automatically fills in when the work order is made and updates when Technician Assigned changes.

11. **The Due Date field** *(Required)*
Use the Due Date field when the requester has a specific date or time by which the service request needs to be completed. *It is critical that necessary deadlines be listed correctly with the date and time*, otherwise requests may be filled too late. This is particularly important for Classroom and Event Support Requests, as they must be set up before classes or events take place. If there is no specific date for the request, make a reasonable estimate based on the type and urgency of the request.

12. **Description, Resolution, and Attachments boxes**
Use the Description field to enter a *thorough* explanation of the requestor's problem or request. To enter text, click the [Add Journal Entry...] button and type in the box that appears. Give as many details as possible, even in lay terms as given by the requestor.
Include
    - Whether or not the affected computer is in-house or not
    - What sort of steps need to be taken (call back, wait for computer to come in, get password, etc.)
    - Initially-reported symptoms of the problem
    - Any error messages involved with the problem (as much text as possible quoted as accurately as possible)
    - Troubleshooting steps already taken by the requestor
    - Your initial observations and findings
    - Any special instructions for the equipment or needs of the requestor
    - *Any* other information relevant to the problem.

    Make any service request updates in this box. See the section "Completing a Work Order" for details on the Resolution box.

13. **Give the caller their work order number and explain that someone will be in touch with them soon.**

14. **Notify Technician**
Use the Notify Technician button to send an email to the assigned technician or team so that they know the work order has been entered and can begin working on it as soon as possible.

Checking a Work Order

Review open service requests regularly. Add to each service request that you have checked the status for the current week (this will accumulate if the request stays open for several weeks).

To check an existing work order:

1. Open track-IT and go to the 

section
2. Click on the views tab and select “Current View - Open Work Orders”
3. Click on the Requestor column to sort by requestor
4. Scroll down to the caller’s name (the list is alphabetical by last name)

When a service call comes in, and there is a request in the system, take one or more of the following actions:

- Update the caller on the status of his or her request from the information in the description field. Then append the request with a note that they called. Include any new or additional information that the caller provides.
- Attempt to transfer the caller to the assigned technician.
  To transfer a call:
  1. Press the Transfer button on the phone and the extension of the person you are trying to reach.
  2. Wait for the person to answer.
  3. If the technician answers, ask if they are available to take a call from [customer] regarding [work order or inquiry description].
     - If the technician can take the call, press the Transfer button again to release the call.
     - If the technician does not answer, or cannot take the call, press the button for the line the call is on to bring the call back, take a message, and pass the message on to the technician.

If no service request has been previously submitted, create a new one and explain to the caller that they should receive a call to confirm the request or resolve their issue. If it is a critical request, assure the caller that you will have someone call them back right away and then *do it*.

Updating a Work Order

Open track-IT, go to the 

section, and open the desired ticket.

Make any service request updates in the Description box. This includes all relevant changes or steps in the process, such as contact with the requestor, reasons for delays, or landmarks in troubleshooting. Updates are especially important for longer-term work orders, as communication and building block steps will accumulate and should be retained in record. *Be as specific as possible*.

Attachments are used for specialty service requests, such as IBM & Gateway warranty work. If there is a specific file that you think needs to be attached to the service request to help resolve a request, simply drag-and-drop the file to the attachments section, or click the “Attach a File” link in Track-IT. The file is then stored in the database along with the service request.

NOTE: Description and Resolution entries cannot be changed once they are saved. To update a service request, click the Append button to add to the description or resolution fields.

Completing a Work Order

Open track-IT, go to the 

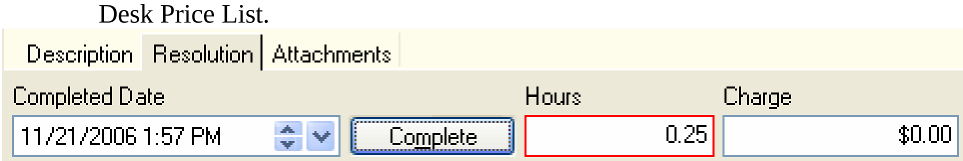
section, and open the desired ticket.

Use the Resolution field to detail the steps taken to resolve the problem. Always include your name in your entries so other technicians can ask questions if necessary. Always enter a thorough resolution so that other technicians learn how to resolve similar issues, and also so that we keep a detailed record of what was done.

Before completing a work order, check with the requestor to make sure that the problem is actually resolved, or find out if they need further help. This way we do not ignore ongoing issues and people feel more secure with our concern that they actually are helped. To confirm a successful resolution you can call the requestor, send an email from Track-IT, or ask upon pickup of the computer at the Help Desk.

Be sure to complete the service request when finished

- Click the Complete button when you have finished the service request.
  NOTE: If you accidentally complete a service request, click the Re-Open button to reopen the service request.
- In the Hours field, enter the amount of time it took to resolve the service request in increments of ¼ hour, so 0.25 hours is the shortest time you can enter.
- For student service requests, also be sure to enter the Charge for the work completed, according to the Student Help Desk Price List.



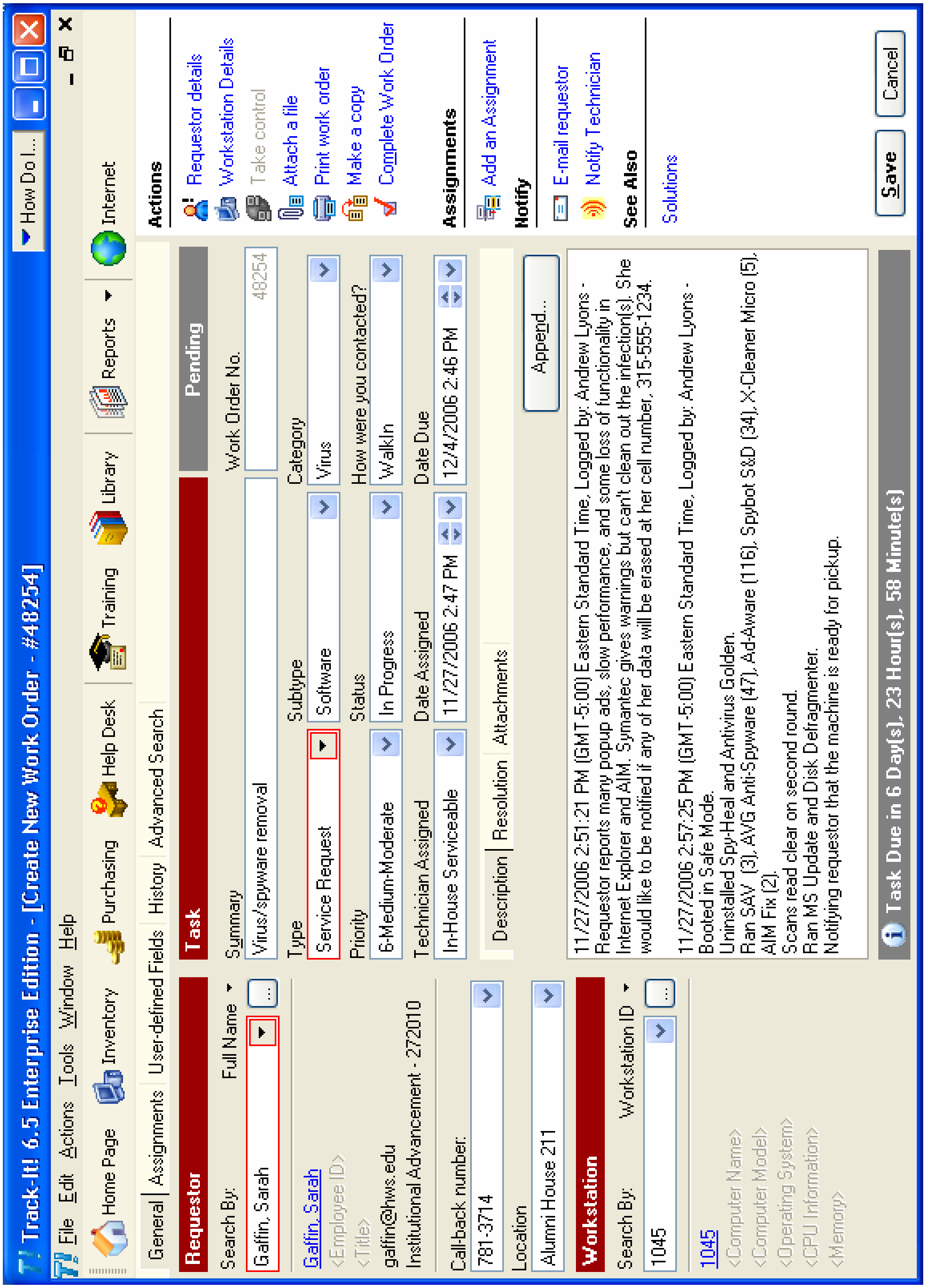
Subtypes and Categories for Service Requests

Note: All of these sections are subordinate to the Type "Service Request."

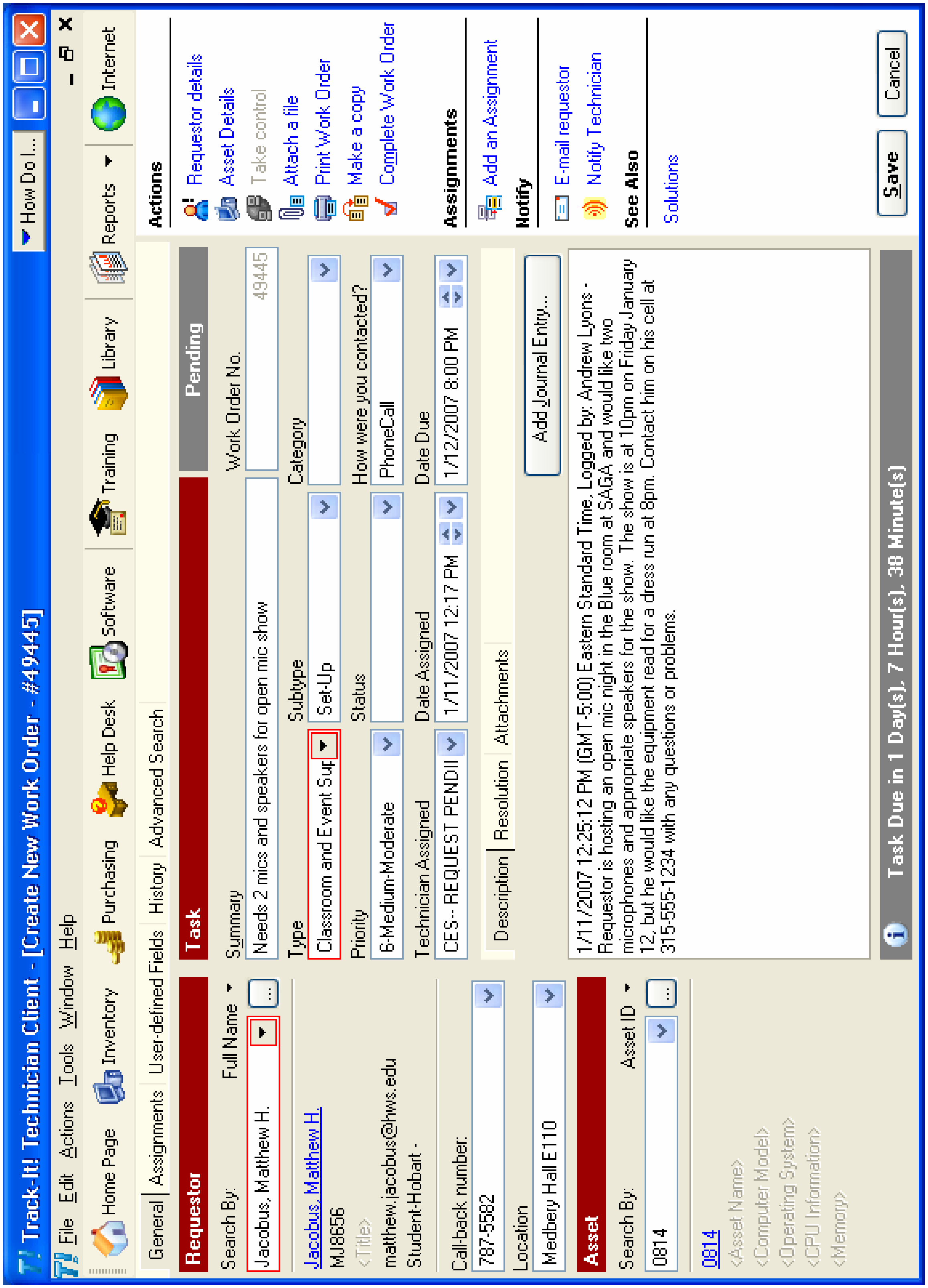
Subtype	Category	Description
Administrative	Inventory	Internal requests for information about current inventory
Administrative	Report	Internal requests for Track-IT reports
Hardware	ADP	Damaged Gateway or IBM computers with Accidental Damage Protection
Hardware	Battery	Laptops with dead batteries
Hardware	CD Drive	Non-warranty CD / DVD drive issues
Hardware	Computer	Miscellaneous category for pre-diagnosis categorization
Hardware	Computer Setup	Faculty/Staff new or replacement computer setups
Hardware	Configure	Hardware that is not defective, just needs to be reseated
Hardware	Floppy	Non-warranty floppy drive issues, or floppy disk issues
Hardware	Hard disk	Non-warranty hard drive issues
Hardware	Keyboard	Non-warranty keyboard problem, or replacement needed
Hardware	Modem	Non-warranty modem issue, possible cause of dial-up problems
Hardware	Monitor	Non-warranty monitor display problems
Hardware	Mouse	Non-warranty mouse replacement
Hardware	Network Cable	Request for network cable, problems with network cable
Hardware	Network Card	Non-warranty network card repair, replacement, or installation
Hardware	Port	Ethernet jack in the wall not working or not available
Hardware	Printer	Unable to print, garbled printing, paper jam, new printer request, ink/toner out
Hardware	RAM	Non-warranty memory (RAM) problem or replacement
Hardware	ResNet Setup	Physical network setup assistance
Hardware	Scanner	Request for new scanner, scanner not working
Hardware	Sound card	Non-warranty repair or replacement of sound card
Hardware	Speakers	External speakers not working, request for external speakers
Hardware	USB Cable	Cable not long enough or not functioning
Hardware	Video Card	Non-warranty video (display) issues or video card replacement/installation
Hardware	Warranty	All non-damage-related hardware issues for student Gateways and IBMs and all service requests requiring replacement parts to be ordered under warranty
Print Credit	Purchase	Buying print credits
Print Credit	Reimburse Request	Request for refund due to printing failure or other legitimated concern
Software	Admin Privileges	People who need authority to install software on a particular computer
Software	Configure	Miscellaneous software-related issues
Software	Data Recovery	Retrieving data from a failed hard drive or floppy
Software	Email	Non-server-related email issues, email client configurations, questions about how to use supported email clients
Software	Freezing/Crashes	Computer shuts down spontaneously, programs crashing, not responding
Software	Install	Software installation
Software	Internet	Non-server-related internet questions and issues, internet browser issues
Software	Network Setup	Connect students to network drives I, M, and N, or antivirus installation.
Software	OS Reinstall	Reimage faculty/staff/student computer, usually due to critical system failures, viruses, pop-ups
Software	Other	Miscellaneous
Software	Password	Requests to change passwords, forgotten password, password not working
Software	Permissions	People who get "access denied" errors for shared calendars or network drives
Software	Printer	Printer software issues, configurations not related to the printer itself
Software	Purchase	Requestors who buy MS Office or MS Windows from the Help Desk for $15
Software	Spy ware	Pop-ups, ads, spyware/adware
Software	~~TrendScan~~	Deprecated
Software	Uninstall	Removal of software
Software	Virus	Virus found, need to remove
Software	VPN	Setup or problems with connection for Virtual Private Network, for faculty/staff/students connecting to the network from off-campus via internet

Sample Track-IT tickets

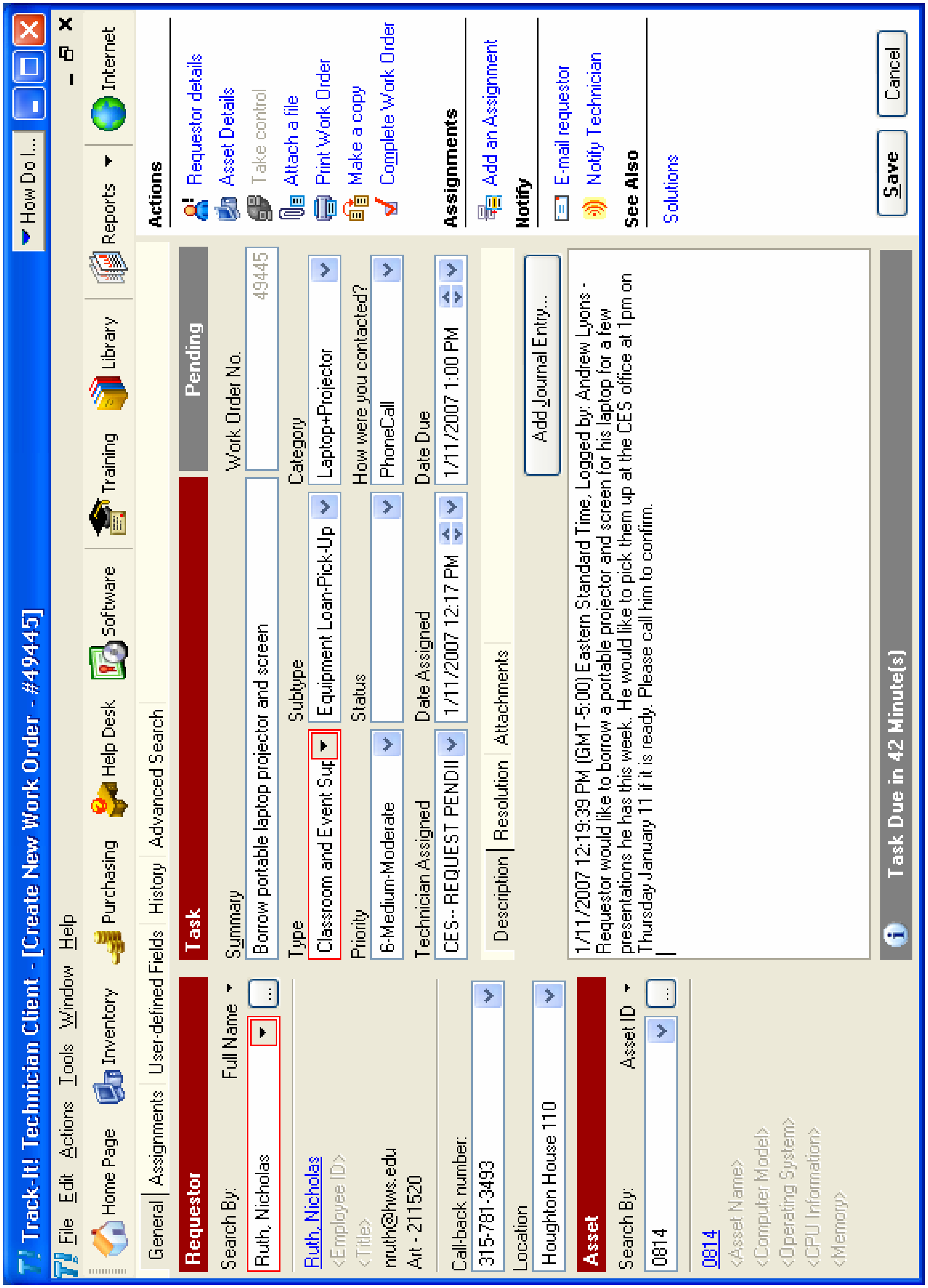
Service Request – Virus



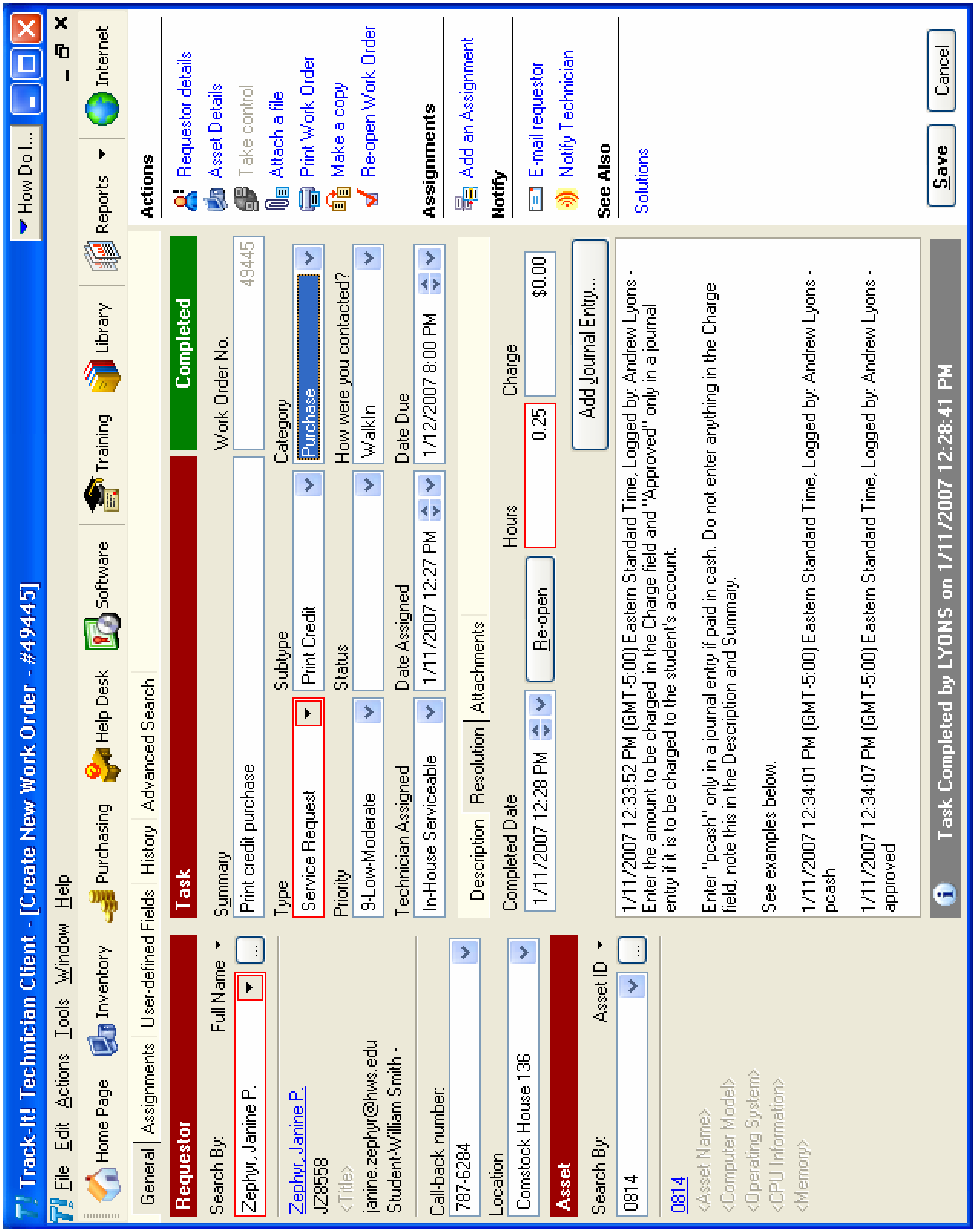
Classroom and Event Support – Setup



Classroom and Event Support – Equipment Loan



Purchase – Print Credits



Purchase – Microsoft Office