

## Tech Training: 4040connect (<http://4040connect.taylor.edu>)

Always log in with your worker account. Your worker account has elevated privileges in 4040connect and other resources.

### Creating a new Ticket

#### Client Info Tab

- Type in the client's first or last name and click to search.

The screenshot shows the 'Client Info' tab with the 'Client Lookup' section. The 'Last Name' field contains 'corduan'. Below the form is a 'Search Results' table with 5 items.

Client Name	E-Mail	Phone	Location	Department
Amber Corduan	christs.jewel@gmail.com			
Meghan Corduan	meghan_corduan@tayloru.edu	x84044		Information Technology
Nick Corduan	nccorduan@taylor.edu	x84052		Information Technology
Seth Corduan	seth@corduan.net			
Win Corduan	wncorduan@tayloru.edu	x85252		

- Select the correct client by clicking on the "Client Name". Client Info should then display.
- Confirm you have selected the right client.

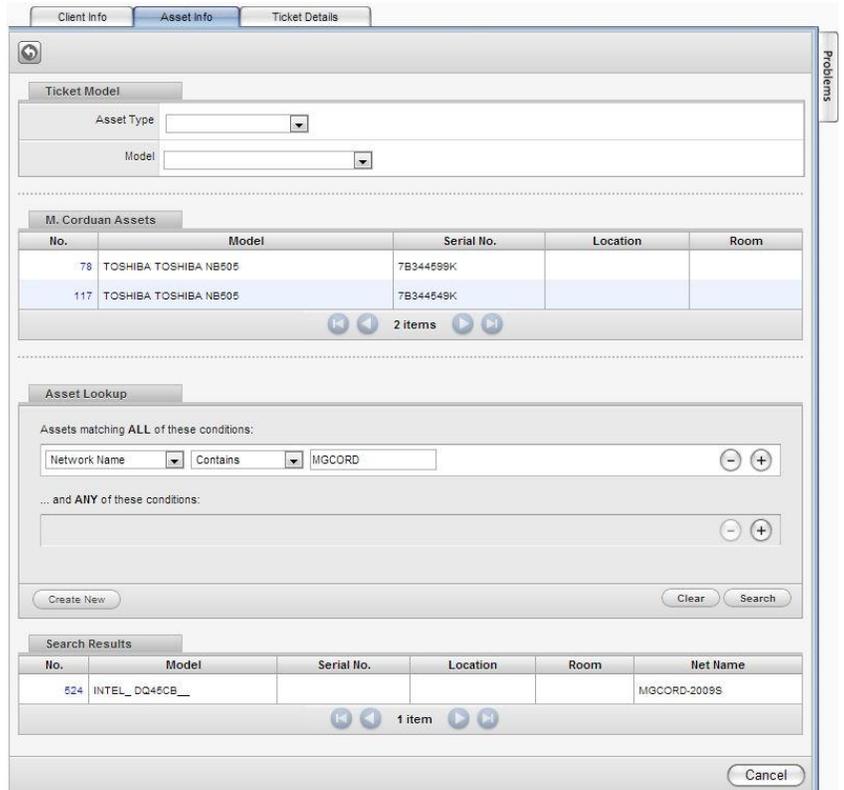
The screenshot shows the 'Client Info' tab with the 'Assigned Client' section displaying details for Meghan Corduan. The 'Ticket History' section shows one item with the following details:

No.	Date	Status	Request Detail
174	11/28/12 04:24 pm	Pending Vendor Interaction	Floodlab18 Infinite Boot Cycle : Floodlab18 is currently in an infinite boot cycle where no matter w...

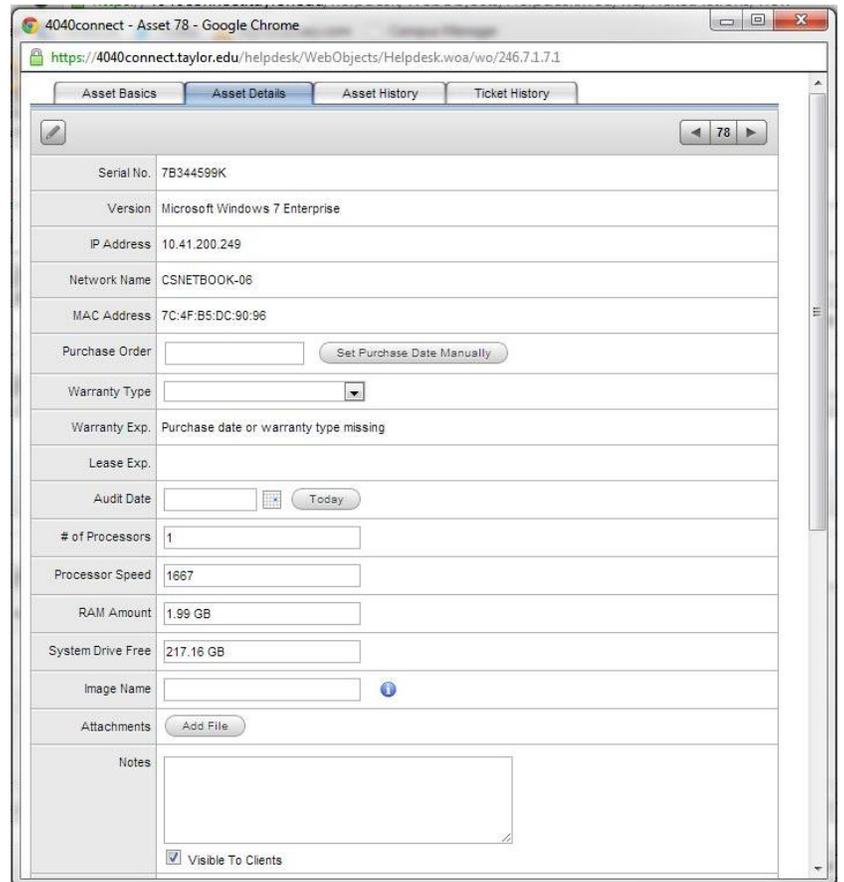
### Asset Info Tab (computer, printer, etc.)

Assets that have been attributed to your client in the past will appear.

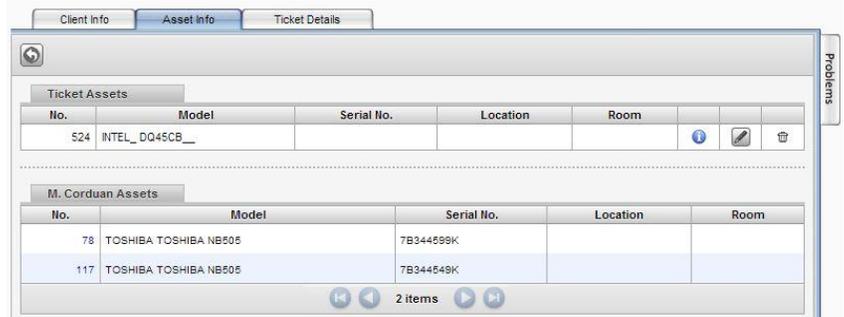
- Click the asset number to assign the asset to the ticket. Once assigned, additional info about the asset is available by clicking the pencil icon. This is where you can find the Computer Name (called Network Name in 4040Connect). Alternately if you know the Computer Name, but aren't sure the model matches any of what's in the list of assets, you can search assets for "Network Name" and a portion of the computer name.
- Select the appropriate asset Number from the results to add the asset to the ticket.



This image shows Asset Details.

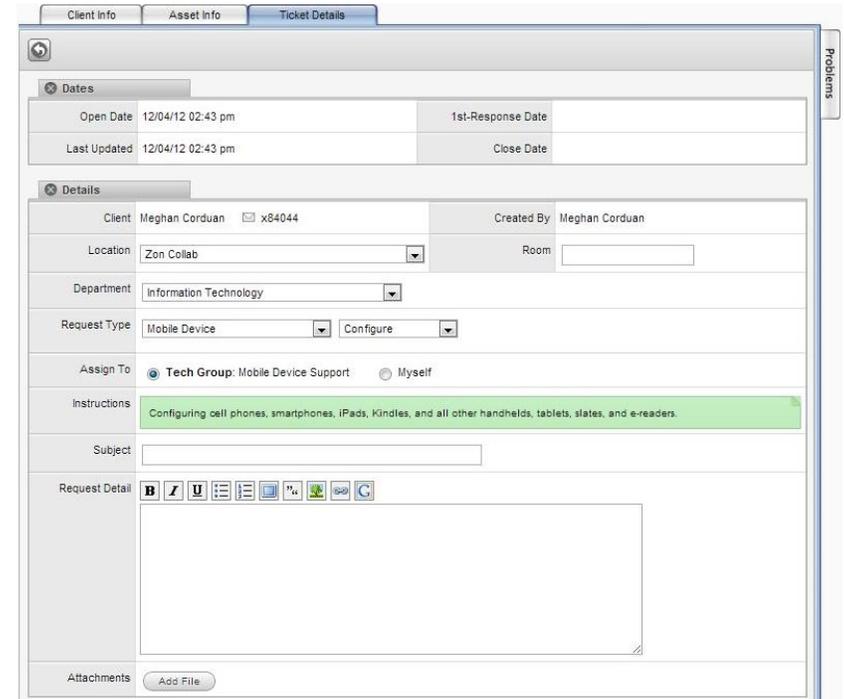


Once you've assigned an asset, "Asset Info" should display. You can click the pencil to find out more info about the asset you assigned, or click the trash can if you assigned the wrong asset.



**Ticket Details Tab**

For faculty/staff, the DEPARTMENT field will usually auto-complete based on info in Active Directory. Students don't have a Department in AD, so manually choose 'Students'.



The LOCATION field will not auto-complete. Specialists who have to visit a client on-site are dependent upon us collecting this piece of information, so put in a location if you know it. The more info we collect, the better our chances of providing a quality solution.

REQUEST TYPE is really, really, REALLY important. Request Type determines which tech group the ticket gets assigned to. Make sure you become familiar with Request Types. Read the green "Instructions" box for hints that you have made the proper selection. Most Request Types also have a Sub-Type.

ASSIGN TO determines which employees/group is given responsibility for the request. Generally, leave this set to "Tech Group". We leave tickets assigned to a group until the request is resolved. At that time, we assign the ticket to the individual employee who delivered the solution.

SUBJECT summarizes the problem being reported. Use descriptive, concise terms. 'Computer Problem' or 'Can't Print' is too generic and not very helpful to specialists trying to resolve the issue. Imagine trying to search for a specific ticket among 100 with a subject of Computer Problem. List instead the computer name, printer name, or specific error message the client is reporting.

REQUEST DETAIL should include all facts gathered about the request. If the client sent an email, paste the email in its entirety, including the email header (From, To, Date), into the Request Detail.

ATTACHMENTS are files, screenshots, and/or documents the client may have included in the request.

NOTES are used to track our progress toward a resolution. Record additional details uncovered while troubleshooting, request additional info from the client, and note the solution reached. Remember that Clients can see your Notes, so always be professional and polite!

CLIENT ROLE describes the person requesting help.

VIP REQUEST determines whether or not the ticket follows our normal path to resolution or if it is assigned to I.T.'s VIP support team. Taylor VIPs are defined as Dean and up. When in doubt, check the VIP List on our Resources page or ask TJ or Geri.

PREFERRED METHOD OF CONTACT is used only when a client requests we communicate with them in a manner other than their Taylor email. If the client is reporting a problem with access to their Taylor email, for example, it is our responsibility to record an alternative means of contacting them. When we take a request for a guest, be sure to collect this information so we can contact them about their project and/or problem.

INITIAL CLIENT CONTACT indicates how the client chose to initiate his/her request for help. This field describes ONLY the initial contact.

RESOLUTION PATH is left blank until the request is resolved. When you resolve a ticket, choose a Resolution Path that best describes the solution.

STATUS of a ticket describes the current condition of the request. Common Statuses include Open (indicates we have everything we need to begin work on the request), Pending – Client Interaction (used when we are waiting for a reply from the client), Resolved (we have delivered a solution we BELIEVE solves the issue), and Closed (the client has confirmed that the solution we provided is sufficient).

PRIORITY defaults to Normal and usually stays there. Change the priority only if multiple clients are affected. This would include entire systems such as email or printing being down.

RECIPIENTS dictates who gets an email notification when a ticket is created or modified. Generally, clients should get a copy of every modification.

CANCEL allows you to leave your current session without modifying the ticket.

SAVE allows you to save changes to a ticket without sending an email notification.

SAVE & EMAIL allows you to save changes to a ticket AND send an email notification to everyone indicated in the RECIPIENTS field. Always Save & Email when you open and resolve a ticket.

The screenshot shows a web-based ticket management interface. At the top, there's a 'Notes' section with a table for recording details. Below that is the 'Custom Fields' section, which includes: 'Client Role' (radio buttons for Faculty, Staff, Student (Undergrad), Student (Grad), Alumnus, Parent, Guest, Contractor), 'VIP Request?' (dropdown), 'Preferred method of contact (optional):' (text input), 'Initial Client Contact' (radio buttons for Phone, E-Mail, Web, Voicemail, Walk-Up, Technician-Direct), 'Resolution Path' (dropdown), 'Was this ticket resolved by an outside services vendor?' (radio buttons for Yes, No, Partly), and 'Mobile Device' (dropdown). The 'Status & Schedule' section includes: 'Status' (Open), 'Priority' (Normal Service Request (10 days)), 'Due Date' (12/18/12 02:43pm), and 'Scheduled Date' (From/To times). The 'Recipients' section has checkboxes for 'Client', 'Tech', 'Level 1 Techs', and 'Group Manager', along with 'Cc:' and 'Bcc:' text inputs. At the bottom right, there are buttons for 'Cancel', 'Save', and 'Save & E-Mail'. A 'Public' lock icon is also visible.

### ***Alternate method of contacting the client***

Type your note and save it. Then click "Send" which appears next to the note. The client will receive a more concise email highlighting your note, rather than the contents of the entire ticket.

### ***Finding an Existing Ticket***

- Move to Tickets > Search Tickets
- Use Basic Search for simple searches. Enter a ticket number, client last name, Request Type, etc.
- Use Advanced Search for more complex searches. Select an existing Query, or create your own by adding the appropriate Condition, such as Status, and choose the appropriate value (Resolved, Open, etc.) Add more Conditions as necessary. In the Search results, click a ticket to open it for editing.

### **Resolving a Ticket**

When delivering a solution to a client:

- Enter a new NOTE summarizing the solution
- Assign the ticket to the proper Technician
- Select a Resolution Path that best describes the resolution.
- Change the Status to RESOLVED
- Click SAVE & EMAIL. 4040connect will send an email notification to the client so they can confirm whether or not the issue has been resolved to their satisfaction. If the client responds "YES," 4040connect will automatically change the ticket status to CLOSED, and the issue will have been completely resolved.

### **Group Tickets**

Use the Group Tickets tab to keep track of unresolved tickets for which Client Services is responsible. Not all unresolved tickets appear under the Group Tickets tab. Only those tickets assigned to your Group appear. As a Client Services Technician, you are a Generalist. You, and the entire CS team, provide Level 1 support for many Request Types. Tickets created with a Request Type we are responsible for will appear under Group Tickets *until and unless the ticket is escalated to Level 2 or higher*. Tickets created with a Request Type we are not responsible for and/or escalated above Level 1 will appear on some other group's Group Tickets tab.