

EXT Ticket Approval Process (INTERNAL) Proposal Document



TABLE OF CONTENTS

Proposal	4
EXT Support Workflow & Form Changes	4
Email Process	5
In Progress Tickets	6
Approval Request Email Templates	6
Billable	6
Non-Billable	7
Pending Approval Report	7

DOCUMENT HISTORY

Original Author: Michelle McCausland, Errigal Inc.
Email: michelle.mccausland@errigal.com

Document Version	Date	Description of Changes	Changes Made By
1	01/11/2018	Document Created	Michelle McCausland

PROPOSAL

ExteNet have requested that an approval process be implemented during the creation of support tickets from requested work.

ExteNet submitted requests that meet the “billable” criteria will be moved into a new “Pending Approval” workflow state and must be approved by the designated approver (Matt Simpson) before work can proceed on the ticket.

EXT SUPPORT WORKFLOW & FORM CHANGES

The ExteNet Support workflow will require 1 new state, “Pending Approval”, which should be implemented in the following way (See Figure 1 - Proposed Workflow Change):

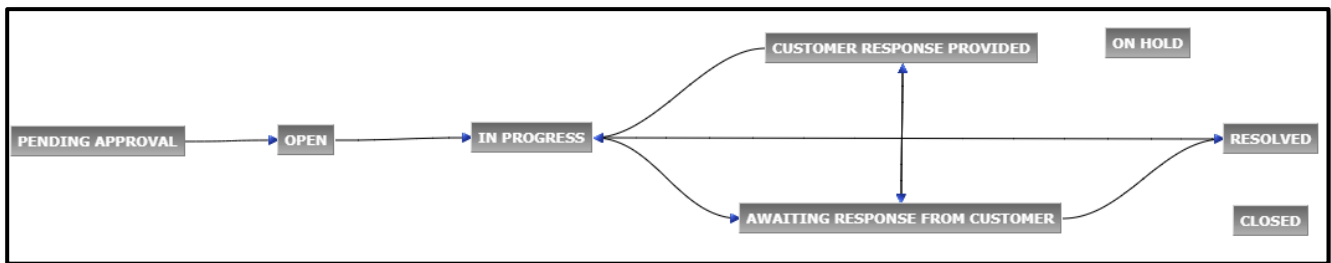


Figure 1 - Proposed Workflow Change

On the Kanban board, the **Pending Approval** state should appear before the **Open** state. Therefore, all tickets created will initially be moved into the **Pending Approval** state.

Another proposed change would be to implement an “approval” form (Entitled **Customer Approval**) to denote that the work has been approved and who has approved it. The form would be added upon entering a pending approval state and the state cannot be advanced to in progress unless the form has been filled in. This form should be visible to the customer.

Form Fields:

- **Requester Email** – the email of the person who submitted the request
- **Ticket Classification** – is the ticket billable or non-billable
- If billable selected, the **Approver Name** defaults to Matt Simpson as he is the only approver initially.
- **Note** - For additional info

While we are implementing this change, I would propose that we utilise the new “**Estimated Effort**” field on the ticket detail window as opposed to the LOE field on the support request form.

This has the added benefit of ensuring report consistency and would be visible from the Kanban view and ticket detail view. This must be communicated to the ops team.

The Estimated Effort can be found in the ticket summary section of a ticket or on the Kanban board (See Figure 2 - Estimated Effort). The unit of time for this field is in hours.

TST-995359 [Edit](#)

Region : ALL REGIONS
 Market : Errigal
 Priority : 3-Medium
 Due Date :
 Workflow : Support Test Workflow
 Status : In Progress
 Status By : mmcc
 Date Created : 01/16/2018 09:44
 Last Update : 01/16/2018 09:58
 Summary : Test Ticket
 Estimated Effort(LOE) : -1
 Actual Effort : -1

Figure 2 - Estimated Effort

EMAIL PROCESS

When an email is received from the customer, it should be reviewed by the ops representative and deemed billable or non-billable.

If you are uncertain about the classification of a ticket (billable or non-billable), please consult with the Customer Support Co-ordinator or the Director of Operations for clarification.

Process:

1. A ticket is generated in Scotty Pro and the ticket starts in the **Pending Approval** state.
2. A **Customer Approval form** is added to the ticket automatically and must be filled in with the appropriate data.
3. The ticket is deemed billable or non-billable.
 - a. If the ticket is deemed non-billable, the ticket advances to the **Open** state and can proceed as normal through the workflow and an email is sent to the customer via the **Non-Billable Approval Request** email template).
 - b. If the ticket is deemed billable, the ticket remains in **Pending Approval** until it is approved.
 - c. An email is sent to the approver and requester (This is handled via the **Billable Approval Request** email template).

Note: Larger scoped tickets or projects (40 Hours or greater), require an exchange of requirements between Errigal & ExteNet. Matt requested this be in the form of a call or similar, to ensure the most accurate requirements are gathered.

IN PROGRESS TICKETS

If an approved ticket is about to go over hours due to new requirements or unforeseen circumstances:

- Stop work on the ticket immediately.
- Review the remaining estimated time.
- Send an email to the ticket approver (Matt Simpson) with this information and move the ticket back to a Pending Approval state to be approved for the remaining work.

APPROVAL REQUEST EMAIL TEMPLATES

BILLABLE

It was proposed an email template be created in ScottyPro to generate an automated response to the customer if the work is billable.

The email template is entitled '**Billable Approval Request**' and it looks like the following:

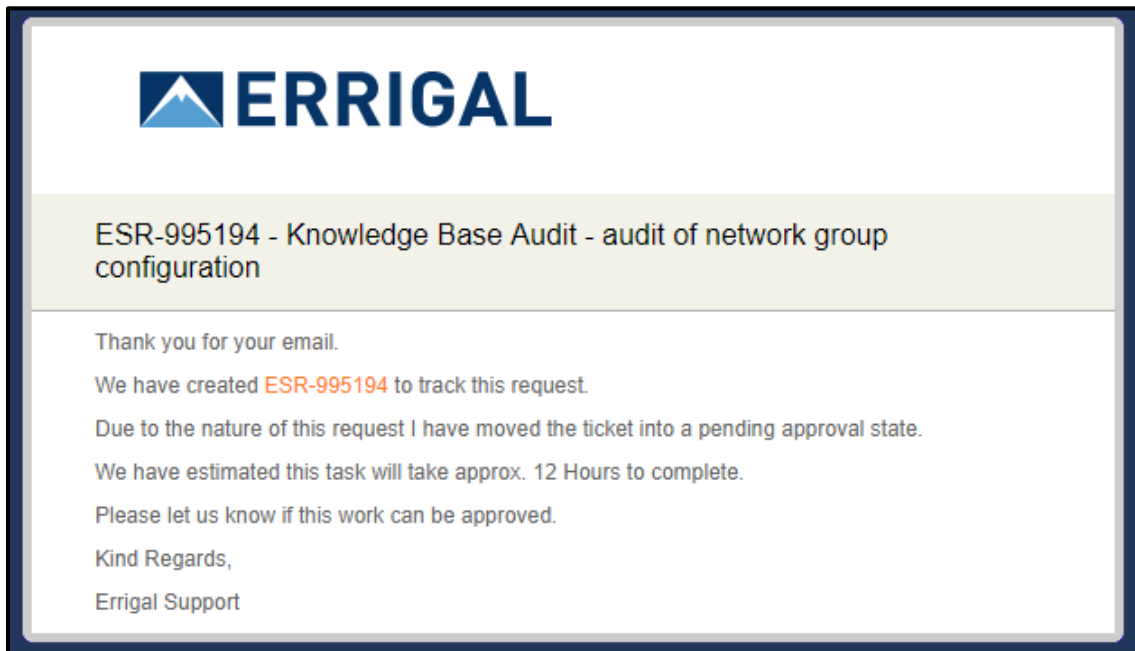


Figure 3 – Billable Approval Request

The form will retrieve the following from the ticket (so it is important that the data be filled in on the ticket or the form won't work as expected!):

- Ticket Id
- Ticket Summary
- Estimated LOE
- Approver Email
- Requester Name

NON-BILLABLE

It was proposed an email template be created in ScottyPro to generate an automated response to the customer if the work is non-billable.

The email template is entitled '**Non-Billable Approval Request**' and it looks like the following:

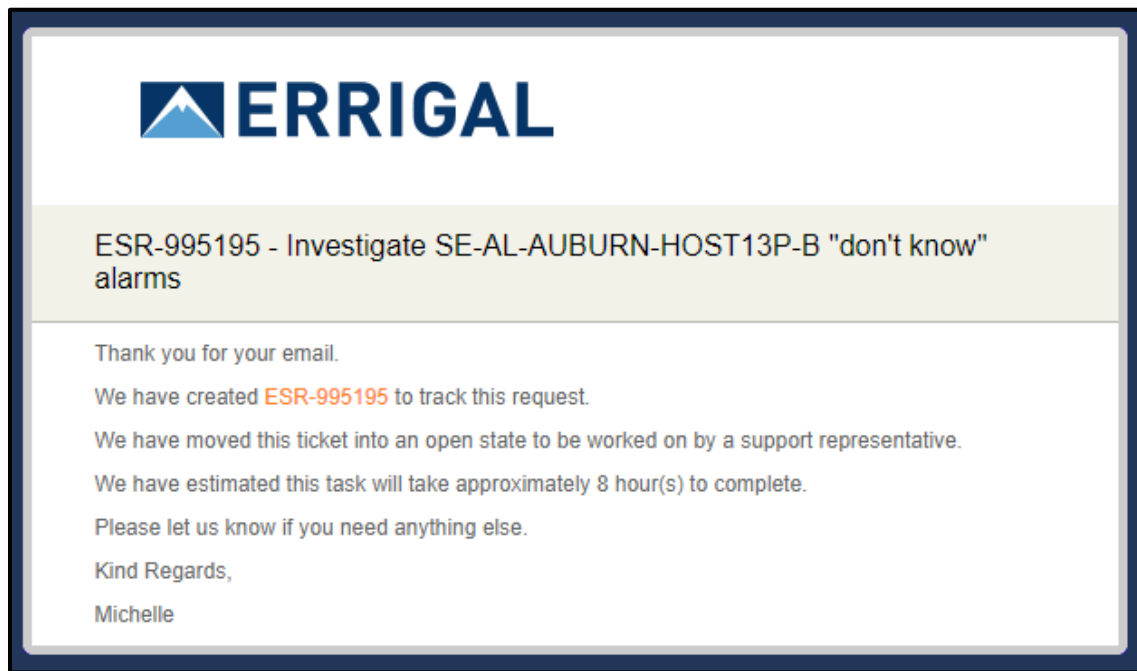


Figure 4 - Non-Billable Approval Request

PENDING APPROVAL REPORT

- A report should be generated on ScottyPro reporting manager which details the list of tickets pending approval. The recommendation would be that this report be sent out on the Friday with the other ExteNet reports so that it can be reviewed prior to the Monday call.
- The report is entitled – **ExteNet Pending Approval Tickets** and can be found on the ScottyPro Reporting Manager.