



Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

200
1822 - 2022

Webhelp Best Practices

*Man Geni Addysg Uwch yng Nghymru
Where Higher Education Began in Wales*

www.uwtsd.ac.uk

AGENDA

- Ticket Checks
 - Problem/Incident Management
 - Correct Status'
 - Merging tickets
- Ticket Etiquette
 - Appropriate and regular ticket updates for clients and techs
 - Meaningful responses when closing tickets
- Dashboards



TICKET CHECKS

- When we create a ticket or receive a ticket ensure key fields are correctly set
 - Location
 - Department
 - Ticket Type
 - Request Type
 - Priority
 - Status
 - If applicable: Room, Contact Number and Computer Name
- Accurately reflect the work being requested / carried out



TICKET CHECKS

BENEFITS

- Proactive problem management
- Call reduction (through additional user training)
- Resource management
- Useful and accurate reports and searches produced



Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

200
1822 - 2022

TICKET TYPES & PRIORITIES

- A ticket can either be:
 - **A Request**
 - R1 – Standard Request
 - R2 – Project Based Request
 - **An Incident**
 - P1 – Multiple service outage – majority of users affected (4 hours)
 - P2 – Service outage, multiple users / campuses affected (8 hours)
 - P3 – Multiple Users Affected (5 days)
 - P4 – 1 user affected (10 days)
 - **A Problem**
 - Two or more incident tickets can be linked to a problem ticket
 - Only the problem ticket is allocated to the lead tech, all other tickets remain with the original investigating team member
- It is set based on the overarching importance and urgency regardless of internal priority.



TICKET STATUS

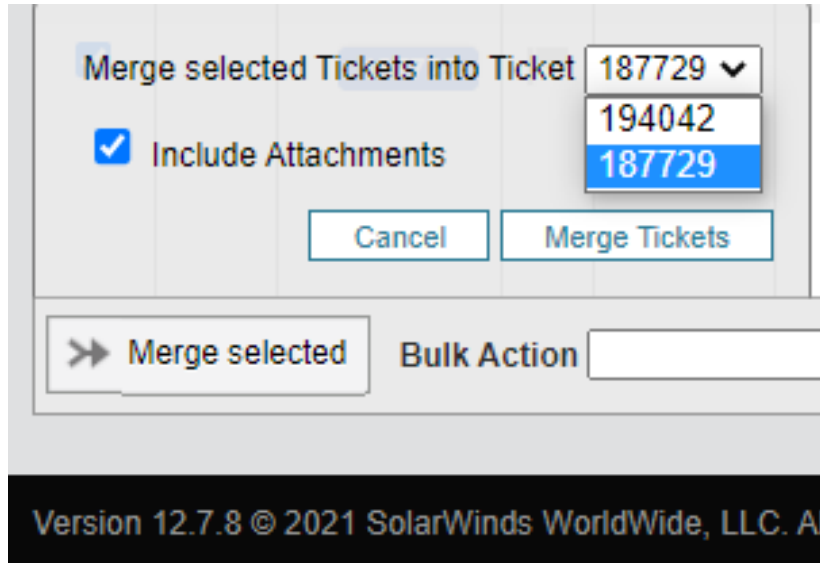
- A ticket status should reflect the current status of a ticket

Worth Noting....

- Waiting on client emails the client about the ticket every 2 days
- When a client updates a ticket, the status automatically changes to 'response received' and this will email the assigned tech weekly
- All tickets once completed should be marked as 'Completed'
 - This will email the client to confirm it is completed and will automatically change to 'closed' once they respond or after 1 working day with no response

MERGING TICKETS

- The newest ticket needs to be merged in to the original (older) ticket



The screenshot shows a web interface for merging tickets. At the top, it says "Merge selected Tickets into Ticket" followed by a dropdown menu currently showing "187729". Below this, there is a checkbox labeled "Include Attachments" which is checked. To the right of the dropdown, a list of ticket numbers is visible: "194042" and "187729", with "187729" highlighted in blue. Below the dropdown and checkbox are two buttons: "Cancel" and "Merge Tickets". At the bottom of the interface, there is a "Bulk Action" section with a button labeled "Merge selected" and an empty input field. The footer of the interface reads "Version 12.7.8 © 2021 SolarWinds WorldWide, LLC. All rights reserved."

- Add a note to the newest ticket to confirm ticket merge and update client
- Search for ticket subjects to see if an existing ticket already exists

TICKET ETIQUETTE

- All notes need to be meaningful, especially when closing a ticket
- No 'blank' re-allocation of tickets and ensure each ticket contains the required information for re-allocation
- Visible notes need to be customer service orientated and professional
- Hidden notes need to be professional and informative
- Full history of a ticket; including conversations or work carried out in person
- Re-allocating or escalation work - to prevent the need to follow up with the client or a tech
- The client needs to be kept up to date as often as possible (minimum of every 3 days)



TICKET ETIQUETTE

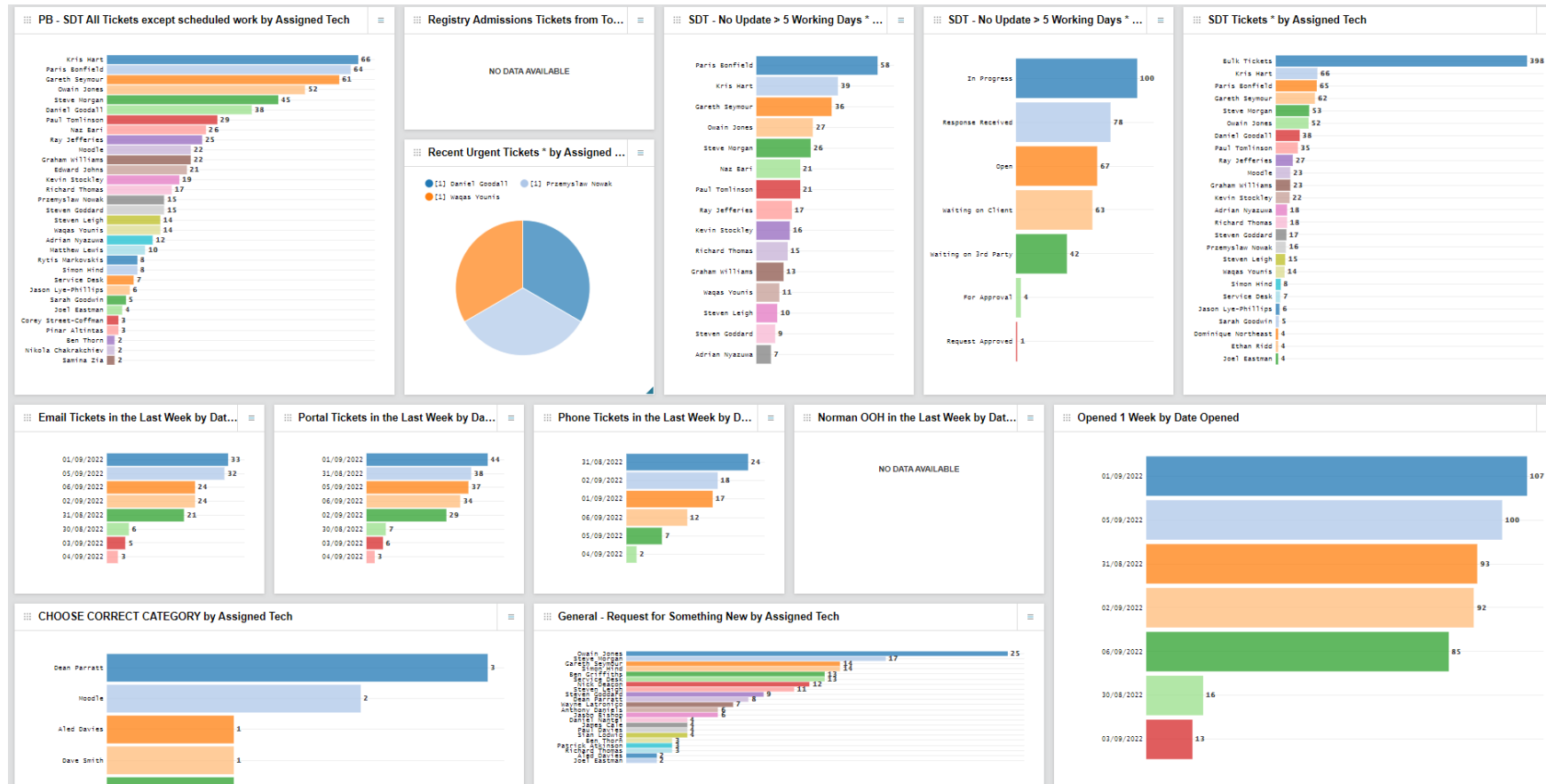
- Useful resolution notes
 - Beneficial from an escalation point of view, effective knowledge share, identifying trends and potential areas for user/tech training
- Bilingual Notes
 - If the user's preference is to communicate through a language other than English then a translation of the client and tech notes need to be included in the ticket. These translations can be hidden notes

Did you know?

- Your own ticket notes can be updated if mistakes are made and also deleted if necessary.
- Properly updated tickets are so useful!
 - It can show all interactions the IT departments have had with a staff or student

DASHBOARDS

It is probably just easier to show you how cool we think this one is...



Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

200
1822 - 2022

REMEMBER

***We deliver excellent
Customer Service first,
IT / Technical support
second***



Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

200
1822 - 2022

ANY QUESTIONS?



Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

200
1822 - 2022