INTRODUCTION

The Footprints service request system is used to track and route service requests to IT service providers campus-wide. IT service providers will begin using the system following a phased implementation. Service requests entered into Footprints for departments that are not yet using the system should be routed using e-mail with a follow-up call or e-mail to ensure the request is not overlooked.

This guide outlines how IT service providers (agents) can use Footprints to track and route service requests.

PLANNING TO USE FOOTPRINTS

The transition to using Footprints to manage service requests begins with identifying the processes that currently exist to manage service requests. The planning process is broken down into four areas: services, agents, teams and escalations.

SERVICES

Review the Service Catalog to see if the services your team provides are included. If the services your team provides are not already included, follow the steps in the section ‘How do I add or change the Service Catalog’ to add the services.

AGENTS

Identify all the individuals that are assigned to update or answer inquiries about services provided. This list should include administrative staff and student assistants who help manage service requests. See the section on How to add, change, or remove an agent for more details.

TEAMS

Identify the teams that agents should be assigned to. Agents can belong to one or more teams. Teams are used for service request assignment, grouping, and notification. See the section on How to add, change or delete a team for more details.

ESCALATIONS

Identify any automated actions, called escalations, to auto-assign or auto-update tickets. Escalations use one or more ticket attributes to assign tickets and to report on time-based events. The requestor’s area and/or service requested are commonly used to assign service requests to specific teams. Escalation rules are built and are coordinated with other escalations to create an automated ticketing workflow. Tickets that are not processed using an escalation are assigned to a team whose role is to manually route or resolve those tickets. Qualified agents can submit a service request with the following categorization: Servers > Ticketing > Workflow to request new escalations. The request should include a detailed description of the escalation rule you would like to have built. Escalations can be based on time or ticket fields.
WHAT IS A TICKET?
A ticket represents an occurrence of a request for service. Requests include:

- **Service Requests** – requests to obtain services one doesn’t already have. e.g., install a new jack
- **Incidents** – requests for assistance with services one already has. e.g., my password no longer works
- **Projects** – Service requests that take over 40 hours and/or requests that would benefit from a project methodology. Projects may be created as a result of incidents.

WHEN SHOULD A TICKET BE OPENED?
A ticket should be opened for every service request, incident, and project. A practical exception to this rule is to exclude requests that would take more time to create the ticket than to complete. At the DoIT Help Desk, every request must have a ticket created. Requests for service that contain multiple requests should be split into separate tickets if they relate to different services. A re-occurring task such as weekly patch review or backup rotation can be set to automatically create the ticket at a defined time interval.

HOW TO OPEN A TICKET
Tickets can be opened a number of ways (listed in order of preference):

1. **Footprints Service Catalog** – requestors login to service.sfsu.edu, click the Service Catalog link, and locate the service they are requesting in the service catalog. This is the preferred method for opening a ticket because it will automatically know who the requestor is and the exact service they are requesting.
2. **Tech Central Quick Request Form** – this method does not require the requestor to login. The customer accesses an unauthenticated form, provides identification information and unstructured information about their request. This method can be used by persons unknown to the Footprints system.
3. **Footprints New Issue Form** – requestors login to service.sfsu.edu, select the New Issue link from the Footprints menu, and identify their service category in the description section. This is one of the preferred methods for opening a ticket because it will automatically know who the requestor is and the service they are requesting. However, this method can result in tickets that are categorized incorrectly, which an agent will need to correct.
4. **E-mail to service@sfsu.edu** – this method does not require SF State authentication and may not identify who the requestor is or the service they are requesting. This method requires a manual ticket review, which may result in delays routing requests. Agents can use this method to convert e-mail requests sent to their individual e-mail account into tickets – indicate when you forward the e-mail who the request should be assigned to, if known. Be very careful not to include any distribution lists in the ‘To:’ or ‘CC:’ of the message as updates will be sent to the list as well as the original requestor.
5. **Phone or Walk-in** – requestors can call or visit an IT support area and an agent will open the service request for them.
HOW TO UPDATE A TICKET

Tickets can be updated via:

- **Replies to ticketing system-generated e-mail messages** - ensure all reply information is at the top of the e-mail message above the line noted in the message or compose a new message and include the ISSUE and PROJ numbers in the subject. Specific keywords can also be used by agents to set ticket fields through e-mail. If any agent responds to a ticket via e-mail the status will automatically change to Responded and send notifications to the agent and customer.

- **Footprints Web Interface** - log into Footprints and update the ticket

Open a Ticket in Footprints

1. Login to Footprints: service.sfsu.edu
2. Select New Issue
3. Enter a descriptive subject
4. Enter the Type of Request: Service Request (new service) or Incident (repair)
5. Set Impact and Urgency
6. Enter contact information
7. Categorize the ticket. If you are unsure how to categorize the service request, search the A-Z Category Guide
8. Complete the remaining required fields
9. Click Save
### Update a Ticket in Footprints

1. Login to Footprints: service.sfsu.edu
2. Locate the request you wish to update using the display dropdown or search
3. Set the **Status**. For information on each status, see Status Definitions
4. Add a **Description**
5. Complete any other required fields (will vary depending on Status and other options)
6. Double-check Assignees and Notifications to verify that notifications will be correctly sent (Note: Customers will always be notified for specified statuses. Selecting Contact will notify the customer in case of a status that does not send automatic notifications.)
7. Click **Save**

The customer and any assignee(s) will receive an e-mail with the updated information (status dependent).

### Update a Ticket via Email

Footprints allows agents to update tickets using e-mail with keywords in the message. To use this functionality, send an e-mail from your SF State e-mail address to service@sfsu.edu with the subject line “Getschema PROJ=3” (no quotes). You will receive an automated reply with the following information:

1. A list of all of the fields you have permission to write information into
2. Basic formatting instructions
3. A list of the ‘legal’ values for choice fields/dropdowns

If you send in an e-mail and a value in a choice/dropdown field is incorrect, the e-mail will be rejected and an error message will be returned. Any information that the system cannot associate with a field will be appended to the description.

### WHAT ARE THE DIFFERENT TICKET STATUSES?

Statuses that send messages to customers are identified with an *

- **Open** - New, unprocessed service requests. Open requests will be routed/assigned using the service categories and the customer’s Department and Area. Requests with no assignment that are reset to Open will be routed again. If a request is manually assigned and the status is not changed from Open, it will automatically change to Assigned. Customers will receive an e-mail confirmation that their ticket has been created.
- **Assigned** - The ticket has been assigned to a team or individual. If an Assigned ticket is not touched it will be escalated according to its priority. Customers do not receive e-mail with this status.
- **In Progress** - An agent/team has taken ownership of the request. Customers do not receive e-mail when their ticket’s status is In Progress.
- **Hold/Pending** - The request is on hold (e.g., no action can be taken until after a specified date), or the request is pending an external response (e.g., a vendor).
- **Requires Customer Information** - An agent has requested further information from the customer. When a request is saved with this status, the customer will be sent a notification e-mail. If the customer does
not respond within 7 days, another e-mail reminder will be sent. If there is no response in 14 days, the ticket will auto-close.

- **Customer Responded** – The customer has added information to the ticket (auto-set when customer responds through e-mail). Assignees will receive an e-mail update.
- **Responded** - An agent has updated a request (auto-set when agent responds through e-mail). The customer will receive an e-mail update.
- **Resolved** - The request has been resolved. The ticket will remain in the agent’s queue, with a status of Resolved, for 7 days. If there is no further action on the request during this time, the ticket will auto-close and be removed from the request queue. Both the customer and assignees will receive e-mail when the status is Resolved.
- **Closed** – The closed status is set by the system. Once closed, a ticket cannot be reopened for reporting purposes.

**WHAT IS A RESOLUTION CODE?**

Resolution codes are used to track the reason the issue is resolved. Resolution reasons include:

- **Cancelled** – request was not completed and has been cancelled
- **Customer fixed** – customer resolved the issue
- **Known Issue** – incident is due to a known issue and cannot be resolved
- **No Response from Customer** – customer has not responded to a request for information from the agent and two weeks have passed
- **Quick Ticket** – used for automated quick tickets with predefined outcomes
- **Resolved / Completed** – standard resolution
- **Training** – customer training resolved the issue
- **Spam / Duplicate / Junk** – tickets with this status will be purged
- **Other** – tickets with this status will be reviewed to determine if other statuses are needed

**HOW TO CHECK THE STATUS OF A TICKET**

The ticket status can be checked by:

- **Reviewing the ticket in the system** - log in to service.sfsu.edu and locate the ticket
- **Contacting the assigned agent/team** - reply to any one of the e-mail notifications sent by the Footprints system, ensuring all reply information is at the top of the e-mail message above the line noted in the message

**HOW TO LOCATE TICKETS**

Tickets can be located using the quick or advanced search features within Footprints. There are two ways to search for a ticket:

- **Quick Search** - Type a keyword such as the customer name, ticket number, or other words used in the ticket’s subject or description into the search box. To search for a number other than an issue number, use double quotes (e.g., “912345678”)
• **Advanced Search** - Use one or more ticket attributes to locate tickets that meet specified criteria — these searches can be saved for reuse. Click the Advanced link under the search box to perform a new search or hover over the link and select the My Searches popup link to perform or change a previously saved search.

<table>
<thead>
<tr>
<th>Create a Personal Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Login to Footprints</td>
</tr>
<tr>
<td>2. Click Advanced (under Search)</td>
</tr>
<tr>
<td>3. Select your search criteria</td>
</tr>
<tr>
<td>4. Select the Save/Run tab</td>
</tr>
<tr>
<td>5. Optional: Give the search a name</td>
</tr>
<tr>
<td>6. Leave the Type as personal</td>
</tr>
<tr>
<td>7. Click Go</td>
</tr>
</tbody>
</table>

The search results will display all tickets that meet the criteria specified. If you named your search, under the display dropdown on the Footprints home screen, you will have a Personal Saved Search that will allow you to do the same search quickly in the future.

**HOW TO CLOSE TICKETS**

When an agent completes a service request, they should update the description, change the status to Resolved and select a resolution code. The customer is notified that the request is complete and is given 7 days to respond otherwise. Once a ticket has been in a Resolved status for 7 days, it is automatically changed to Closed status. Closed status tickets cannot be reopened but can be linked to new tickets should the issue need to be readdressed. If the customer responds before the ticket is placed in Closed status, the ticket will be placed in the Customer Responded status and the agent will be notified.

<table>
<thead>
<tr>
<th>Resolve a Ticket in Footprints</th>
</tr>
</thead>
<tbody>
<tr>
<td>If the request you are working on is completed:</td>
</tr>
<tr>
<td>1. Change the Status field to Resolved</td>
</tr>
<tr>
<td>2. Enter a Resolution Code</td>
</tr>
<tr>
<td>3. Double-check Assignees and Notifications to verify that notifications will be correctly sent (Note: Customers will always be notified for specified statuses. Selecting Contact will notify the customer in case of a status that does not send automatic notifications.)</td>
</tr>
<tr>
<td>4. Click Save</td>
</tr>
</tbody>
</table>

The request will remain in your queue, with a status of Resolved, for 7 days. If there is no further action on the request during this time, the request will auto-close and will be removed from your request queue.

**WHAT IS A QUICK TICKET?**

A quick ticket is a pre-coded service request that can be used to quickly and easily record frequently reported customer issues such as those looking for campus directions. To use a quick ticket, hover your mouse over the New Issue link on the Footprints menu and select the appropriate quick ticket from the resulting dropdown menu.

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WHAT IS A GLOBAL TICKET?

Global tickets are used when an incident occurs that results (or has the potential to result) in many related tickets. Global tickets can be used both as notification and tracking for widespread incidents. For further information see [Global Tickets](#).

HOW TO LINK RELATED TICKETS

Linked tickets help agents group related issues, note multiple instances of an issue, or track multiple parts of a request. Related tickets can also be used to note duplicate tickets entered into the system. To link tickets, open the first/master ticket in Details mode, select Link, and type in the related ticket’s issue number.

HOW TO CREATE SUBTASKS

There are times when an issue needs to be divided into subtasks that are to be completed by different users. When all subtasks are completed, the ‘master’ issue can be closed automatically or manually by the agent it was assigned to. To create a subtask ticket, open the master ticket in Details mode and then select Subtask to open a new (child) ticket. (Note, the agent opening/requesting the subtask is usually the customer for the subtask ticket so that the master ticket’s agent will receive updates but the external customer will not.) Updates to the subtask ticket will be noted in the master ticket. It is also possible to link a standalone subtask ticket to a master ticket.

GLOBAL TICKETS

Global issues affect multiple users and are tracked using a global ticket. Global tickets can be used to:

1. Notify users of potential issues and provide a place for reporting on the issue
2. Track many tickets related to a single incident, allowing them to be addressed/resolved as a group.

Any agent can create a global ticket to track a global issue. Individual incident tickets can be linked and managed from the global ticket. Global tickets are seen by both agents and customers and should follow the global ticket guidelines.

PROPERTIES OF A GLOBAL TICKET

SCOPE

Global tickets are visible to all agents and customers. For agents, Footprint’s default Home screen displays a global issues widget listing all active global tickets. Additionally, when a global ticket is opened or closed, agents using the Web interface will receive a popup alerting them to the global ticket’s status. Customers who log in to Footprints will also see a list of all active global tickets. The customer interface allows them to easily create a new, linked ticket if they wish to report that they are experiencing a related problem.

Note: Agents can change the settings for their Global Issue widget (e.g., increase the number of items visible in the list) by changing the widget settings located under Preferences > Homepage.

GLOBAL LINKS

Once a global ticket has been created, other incident tickets can be linked to it (child tickets). The link can be created either when opening a new incident ticket or by linking an existing incident ticket. Having incident tickets
linked to a global ticket allows the agent(s) providing resolution to update and/or resolve many tickets at once. When working with global tickets, dynamic links are preferred. For more information on how to link tickets, see How to Link Related Tickets.

Any ticket linked to a global ticket that is subsequently discovered to be unrelated should be un-linked as soon as possible to prevent the customer from receiving notices related to the global ticket and/or having their ticket prematurely closed.

NOTIFICATIONS

Global tickets provide notification via Web and e-mail:

Web

- Agents receive a popup notification that a global ticket has been created after logging in (any status)
- Agents see a list of all open global tickets on their Home screen
- Customers are shown a list of active global tickets when they log in

E-mail

- Updates to an open global ticket are sent to all dynamically linked tickets
- Resolving an open global ticket updates and resolves all dynamically linked tickets

Because global tickets and the notifications they create will be visible to all Footprints users, it is important to follow the guidelines and use customer appropriate language for all updates. For more information see: Customer Communication.

CREATING AND UPDATING GLOBAL TICKETS

New global tickets can be created by selecting New Issue > New Global from the Footprints Home screen.

WHEN SHOULD GLOBAL TICKETS BE CREATED OR UPDATED?

There are two scenarios in which a global ticket should be created:

- Preemptively, when planned service may result in outages or changes that affect customers and/or agents. Preemptive tickets should be created 1-2 weeks ahead of scheduled issues
- When 3 or more instances of a problem have been reported and more are likely. Global tickets can be created any time including after the incident is resolved for any issue that would benefit from being managed through a global ticket

Global tickets should be updated whenever information should be provided to all linked tickets. Additionally, global issues that are not quickly resolved should use the associated global ticket to send periodic updates to the customers to keep them advised that the issue is being addressed. Global issues/tickets that are resolved should be updated as soon as possible to notify affected customers. See Closing Global Tickets

GUIDELINES

Because notifications related to global tickets will be broadcast to both agents and customers across the system, the following items should be addressed when creating new global tickets:
• The subject should be short and descriptive (by default only 35 characters will appear in the announcement window)
• The global ticket should be assigned to a specific team/agent, global tickets should always have a responsible party
• Any agent logging a ticket who sees a related global ticket should link their ticket

CLOSING GLOBAL TICKETS

Global tickets will close one week after they have been marked as Resolved. The following procedure should be followed to resolve/close a global ticket.

1. When the incident is resolved, change the global ticket’s status to Resolved
2. Add the word RESOLVED to the beginning of the ticket’s subject

SERVICE LEVEL AGREEMENTS (SLA)

WHAT IS AN SLA?

In Footprints, a service level agreement (SLA) defines the contracted delivery time of defined services. The delivery time has two components: response time and resolution time. The SLA is different for each of the different ticket priorities: Critical, High, Medium, and Normal. The goal is to meet or exceed the SLA 85% of the time. Additional notifications can be created for teams that have shorter SLAs.

Ticket priority is automatically defined by impact and urgency using the following matrix.

<table>
<thead>
<tr>
<th>URGENCY</th>
<th>Security, Health, or Safety</th>
<th>Work stopped</th>
<th>Work Impaired</th>
<th>Standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impact</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Campus Wide</td>
<td>Critical</td>
<td>Critical</td>
<td>Critical</td>
<td>Medium</td>
</tr>
<tr>
<td>Multi-Building</td>
<td>Critical</td>
<td>Critical</td>
<td>High</td>
<td>Medium</td>
</tr>
<tr>
<td>Building</td>
<td>Critical</td>
<td>Critical</td>
<td>High</td>
<td>Medium</td>
</tr>
<tr>
<td>Floor</td>
<td>Critical</td>
<td>Critical</td>
<td>High</td>
<td>Normal</td>
</tr>
<tr>
<td>Room</td>
<td>Critical</td>
<td>High</td>
<td>Medium</td>
<td>Normal</td>
</tr>
<tr>
<td>Single User</td>
<td>Critical</td>
<td>High</td>
<td>Medium</td>
<td>Normal</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Priority</th>
<th>SLA Response Time</th>
<th>SLA Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Critical</td>
<td>1 hour</td>
<td>4 hours</td>
</tr>
<tr>
<td>High</td>
<td>2 hours</td>
<td>8 hours</td>
</tr>
<tr>
<td>Medium</td>
<td>4 hours</td>
<td>16 hours</td>
</tr>
<tr>
<td>Normal</td>
<td>8 hours</td>
<td>80 hours</td>
</tr>
</tbody>
</table>
SLA notifications are set for each priority and event to notify the assigned agent/team of potential/missed SLA problems. Note: SLA notifications will be enabled following testing. (As of 08/21/13)

<table>
<thead>
<tr>
<th>Priority</th>
<th>SLA Response warning</th>
<th>SLA Response missed</th>
<th>SLA Resolution warning</th>
<th>SLA Resolution missed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Critical</td>
<td>.75 hour</td>
<td>1 hour</td>
<td>3 hours</td>
<td>4 hours</td>
</tr>
<tr>
<td>High</td>
<td>1.5 hours</td>
<td>2 hours</td>
<td>6 hours</td>
<td>8 hours</td>
</tr>
<tr>
<td>Medium</td>
<td>3 hours</td>
<td>4 hours</td>
<td>12 hours</td>
<td>16 hours</td>
</tr>
<tr>
<td>Normal</td>
<td>7 hours</td>
<td>8 hours</td>
<td>64 hours</td>
<td>80 hours</td>
</tr>
</tbody>
</table>

CUSTOMER COMMUNICATION

WHEN DOES THE CUSTOMER GET E-MAIL?

The customer receives e-mail:

- When the ticket is created
- When an agent changes the status to ‘Requires Customer Information’, ‘Responded’, or ‘Resolved’
- When the status is set to ‘Requires Customer Information’ and no response is received within one week
- When the status is set to ‘Hold’ or ‘Pending’ and no update is made within one week
- Users added to the ticket’s cc: field will receive e-mail whenever the customer does

Note: If any agent responds to a ticket via e-mail the status will automatically change to Responded

<table>
<thead>
<tr>
<th>STATUS</th>
<th>Customer cc:</th>
<th>Agent</th>
<th>Team *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assigned - to a Team</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assigned – to an Agent</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In Progress</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Requires Customer Information</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Customer Responded</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Responded</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Resolved</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Hold/Pending</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Closed</td>
<td>X **</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Teams configured to receive all updates will receive all agent updates
**Customers who reply to a closed ticket will receive notice that the ticket is closed and cannot be reopened

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HOW DOES AN AGENT COMMUNICATE WITH THE CUSTOMER?

Agents should use the Description section of the ticket to communicate with the customer. It is recommended to think of Description entries as a mini e-mail message, addressing the customer and signing your message with your name or signature. Signatures can be created and saved in Preferences. Customers can also login to Footprints and see the current status of their tickets.

HOW CAN I COMMUNICATE WITH THE CUSTOMER USING ANOTHER E-MAIL ADDRESS?

Enter the preferred address in the SF State e-mail address field of the service request form. This address will be saved and used only for this service request. If you want to preserve the original e-mail address, you can place it in the Alternate e-mail, Description, or Internal Notes fields. Mail is not automatically sent to a user's alternate e-mail address.

HOW DO I STOP THE CUSTOMER NOTIFICATIONS FOR A REQUEST?

To stop e-mail being sent when a ticket is created, remove the address in the SF State e-mail address field of the service request form. The address will be removed from this service request/ticket only.

For other statuses, uncheck the box next to Customer in the Assignees and Notifications area of the ticket.

HOW CAN A CUSTOMER CHANGE THEIR ALTERNATE E-MAIL ADDRESS?

The alternate e-mail address shown in Footprints is taken from the student information management system (SIMS). To update the address, the customer should:

1. Login to gateway.sfsu.edu
2. Select Profile
3. Locate the ‘Student Profile’ section and select the ‘Update Contact Information’ link Note: The address will be reflected in Footprints within one week.

AGENT OUT OF OFFICE MESSAGES

Footprints handles auto-generated out of office messages like any other agent e-mail to the system (i.e., updating the ticket description and changing the status to Responded) unless the message contains a specific phrase. To avoid having the system respond to an out of office message, include one of the following phrases in the body of your email:

- Out of office
- Out of the office

WHY IS THE PHONE NUMBER FIELD EMPTY?

Office phone numbers for faculty and staff will be added at a future date.
ASSIGNING REQUESTS TO AGENTS AND TEAMS

WHAT IS AN AGENT?
Agents are employees of SF State who update tickets, assign tickets, or generate reports within the Footprints system. Once a user has agent status within the system, they will not be able to interact with the system as a customer. There are two types of agents: Agent A can see all requests across the system. Agent B can see requests within their teams only. Note that Agent B users cannot see tickets for which they are the requestor if the ticket is assigned to another team.

WHAT IS A TEAM?
A team is a way of organizing agents for ticket assignment purposes. Teams can be setup with no members or with one or more members.

TEAMS WITH NO MEMBERS
Tickets assigned to teams with no members must be monitored and managed using the Footprints application. An example of a team with no members is the DoIT Service Desk Team. It is used to group tickets that need more information about the requestor and/or request. Tickets assigned to this team are monitored within Footprints. This permits the student assistants to handover unfinished tickets automatically during shift changes.

TEAMS WITH ONE MEMBER
Tickets assigned to teams with one member can be created, but are not recommended. If an escalation is needed to assign tickets to an individual, a team of one will be used so the membership can be easily changed. However, teams of one need to plan for redundancy and may need to request another agent be temporarily assigned to the team when the only member is unavailable for more than two days. Alternatively, they can ask another agent to monitor the queue while they are away. An example of a team of one is the DoIT SharePoint team.

TEAMS WITH MULTIPLE MEMBERS
Tickets assigned to teams with multiple members are the most common type of team. Each team can be setup to assign tickets using one of the following assignment methods:

- **Leave assigned to team** - the most flexible method that permits the team leader or team members to assign work
- **Assign to a specific individual** – all requests are assigned to the same person even if they are out of the office
- **Round robin amongst all team members** – requests are assigned sequentially to agents regardless of the amount of work, agent specialization, or availability
- **Assign to all members of the team** – all agents are assigned the request

HOW DO TEAMS GET NOTIFIED OF NEW SERVICE REQUESTS?
Each team has e-mail notification preferences that can be set. The e-mail preferences are:

- **Always for all activity** - All team agents will receive e-mail notifications for all updates
- **Only when no individual is assigned** - All team agents will receive e-mail notifications for all updates until an individual member is assigned (most common)
- **Never** - no e-mail notifications will be sent

**WHAT HAPPENS WHEN A TEAM MEMBER IS NOT AVAILABLE?**

Tickets assigned to teams of one, teams using round robin, and tickets assigned directly to an individual, pose a risk that the ticket will not be attended to if the assignee is not available. All agents, however, can view the tickets assigned to an agent who is not available and can respond or reassign them as appropriate. If a team member will be unavailable for an extended period of time, the team can be updated to temporarily remove them from the team by submitting a service request.

**WHAT IS A TEAM LEADER AND WHAT IS THEIR ROLE?**

The team leader can be setup to receive automatic escalations for tickets assigned to agents in their team. Team leaders can review unassigned tickets and assign them to agents. If a team leader will be unavailable for an extended period of time, a temporary change to the team leader can be requested through a service request. If a team leader is temporarily unavailable, they can ask any other agent to monitor the team’s ticket queue and follow their assignment procedures. There can only be one team leader and the team leader must be a member of the team.

**HOW TO ADD, CHANGE, OR DELETE A TEAM**

Qualified agents can request team changes by opening a service request and categorizing the request as **Servers > Ticketing > Team** > (Add, Change, Revoke). For additions, please include the following details in the request’s Description:

- **Team Name**: All team names must be prefaced with the college or department abbreviation (e.g., DoIT, AT) and are limited to 30 characters. Each department or college is required to have a team named Desktop (e.g., DoIT Desktop) for the assignment of service requests between departments. Team names may be altered to suit campus naming conventions.
- **Team Members**: List agents by first name, last name, and ID number. Teams should have at least one member.
- **Team Leader** (must be a team member): The team leader will receive notifications when tickets are escalated due to missed SLA responses/resolutions. Additional escalations can be built if desired.
- **Team Description**: A brief description of the team’s primary functions and the type of requests that should be assigned to this team.
- **Assignment Method for Incoming Requests**:
  - Leave Assigned to Team: Requests will always be assigned to the team; team members can self-assign requests or a designated team member can assign requests
  - Assign Individual Member(s): Requests will be assigned to a specified team member(s) (include first and last name for each agent)
  - Assign All Members: Tickets will be assigned to all team members, including the team lead
  - Assign Round-Robin (with or without checking internal calendar, internal calendar must be maintained manually): Requests will be assigned round-robin style to team members, including the team lead
- **Team E-mail Preferences**:
  - Always for all activity: All team agents will receive e-mail notifications for all updates.
Only when no individual is assigned: All team agents will receive e-mail notifications for all updates until an individual member is assigned.

Never

WHAT DOESN’T AN AGENT SEE TICKETS THEY HAVE CREATED WHEN THEY LOG IN?

Agents, by default, see only the tickets assigned to them when they log in. If an agent would like to see the tickets they have created for others, they can either search for the ticket or create a saved search/view that shows the tickets they have assigned to others.

How to View Personal Tickets when you are an Agent

1. Login to Footprints
2. Click Advanced (under Search)
3. Select the Contact Criteria tab
4. Enter your ID number in the SF State ID field
5. Select the Save/Run tab
6. Give the search a name
7. Click Go

The search results will display all of your tickets. Additionally, under the display dropdown on the Footprints home screen, you will have a Personal Saved Search that will allow you to do the same search quickly in the future. To make this your default view, see Footprints Preferences.

HOW TO ADD, CHANGE, OR REMOVE AN AGENT

New agents can be added to the system by opening a service request and categorizing the request as Servers > Ticketing > Agent > Add. A service request should also be opened when requesting a change in an agent’s role or when an agent needs to be deleted. The service request should be categorized as Servers > Ticketing > Agent > Change/Revoke. In the request indicate:

1. Agent name (as it should be displayed to customers)
2. Agent e-mail
3. Agent SF State ID
4. Agent Department code

HOW TO ASSIGN TICKETS TO OTHER TEAMS

Agents can create service requests and assign them to other teams. Requests should not be assigned to individual agents without prior agreement between teams. If you don’t know which team to assign a ticket to, assign it either to the area’s ‘Desktop’ team if the general area is known or to the DoIT Service Desk team.

TRANSFERRING TICKETS – HOW DO I TRANSFER A TICKET TO ANOTHER TEAM?

Agents and teams that are assigned service requests that they believe are not routed properly should:

1. Review the categorization, which may have caused the misrouting. Correct as needed. To have auto-routing run again, remove any assignees and reset the ticket status to Open, or
2. Manually reassign the ticket to the more appropriate team
3. If the initial assignment was done manually, notify the individual that assigned the ticket why the ticket should have been assigned differently. If the ticket was assigned automatically (noted in the ticket’s History as Escalations), contact the DoIT Ticketing team.

**Route a Service Request to a Different Team or Department**

Note: Please do not assign requests to individual agents without explicit permission. Always assign tickets to a team.

1. Login to Footprints: service.sfsu.edu
2. Locate the ticket you wish to route using the display dropdown or search
3. Click **Edit** (More... > Edit if in compressed view)
4. Change the status to **Assigned**
5. In the Assignees and Notifications section, remove any agents/teams who should no longer be assigned
6. Add the team(s) you wish to assign the request to (listed in the Workspace Members field)
7. If appropriate, update the **Description** field regarding the change
8. Click **Save**

If you know the department but not the team where a request should be assigned, please assign to that department’s Desktop team.

**HOW DO I KNOW IF A TICKET HAS BEEN ASSIGNED TO ME?**

Agents are notified when a request is assigned to their team. If the ticket is assigned to you, you will receive a second e-mail notification with your name in the Current Assignee(s) line of the message. When viewing a ticket in Footprints, if the Assignee section shows just a team name, it is an FYI. If it shows your name, it is a direct assignment to you.

**CAN I FORWARD MY EXISTING SERVICE REQUEST E-MAIL TO SERVICE@sfsu.edu?**

It is possible to forward all or some of the messages sent to an existing service e-mail address to service@sfsu.edu and to have them automatically assigned to a team. It is very important this is coordinated with the Ticketing team to ensure mail loops are not created. If you would like to discuss this option open a Service Request and select Server > Ticketing > Other or e-mail service@sfsu.edu. Please note it takes 1-2 weeks for this to be setup.

**SERVICE CATALOG**

**WHAT IS THE SERVICE CATALOG?**

The Service Catalog describes information technology services offered campus-wide. Each entry in the catalog specifies who the service is for, who can request the service, how to request service, and how to obtain more information about the service. Service Catalog services are mapped to categories used to classify service requests. Multiple services can map to the same category but a service cannot be mapped to more than one category. Services that must be requested can be setup with a ‘Request this Service’ button that automatically sets the appropriate field values.
HOW DO I ADD OR CHANGE THE SERVICE CATALOG?

Agents may open a Service Request and select Server > Ticketing > CMDB. Describe the addition or change requested. For new requests, include the following information:

- Service Name
- Description
- More Information (URL)
- To access service (URL)
- To request this service using a Footprints ticket ‘Request this Service’ button or (URL)
- Available to:
  - Students Y/N
  - Faculty Y/N
  - Staff Y/N
  - Visitor Y/N
- Service Team
- Service Provided by

FOOTPRINTS PREFERENCES

HOW DO I SET MY INTERFACE PREFERENCES?

Agents are encouraged to review the following recommended changes for Footprints’ default interface settings. These options are located on the tabs of the Preferences screen. Recommended changes include time zone, spell check, setting the auto-refresh interval, and configuring the agent homepage to show quick links.
Recommended Preferences Settings

Replace MORE... with EDIT and DETAILS Links

1. Login to Footprints
2. Select Preferences
3. Select the Homepage tab
4. Under Subject Column Options set the Quick Links Display dropdown to Always Include Quick Links
5. Click Save

Display Full Description when Editing

1. Login to Footprints
2. Select Preferences
3. Select the Issue Page tab
4. Enable Display Complete Description on Edit
5. Click Save

Set Time Zone

1. Login to Footprints
2. Select Preferences
3. Select the Personal Info tab
4. Set the timezone to PST
5. Click Save

Issue Page

The following settings are recommended changes affecting ticket format:

1. Login to Footprints
2. Select Preferences
3. Select the Issue Page tab
4. Enable Display Complete Description on Edit
5. Enable Automatic Spellcheck
6. Enable (Yes) the Rich Text Editor
7. Create a Quick Description/Signature to save time
8. Click Save

Homepage Appearance

The following settings are recommended changes for your Footprints homepage:

1. Login to Footprints
2. Select Preferences
3. Select the Homepage tab
4. Under Subject Column Options set the Quick Links Display dropdown to Always Include Quick Links
5. Set the Auto-refresh Interval to 15 Minutes
6. Set the Subject Column Options to Include Expanded Description in Subject
7. Add or Remove desired Homepage Columns
8. Set the Default List to a specific team assignment or Personal Saved Search that provides the most relevant information for you

Click Save
SUPPORT AND TRAINING

WHERE CAN I GET MORE INFORMATION ABOUT FOOTPRINTS?
The online help accessed from service.sfsu.edu can provide more information in the context of the screen you were on when you selected Help. For step-by-step instructions to common tasks see the “How to use Footprints for Agents Guide”

CAN I OPEN A TICKET WITH BMC ABOUT FOOTPRINTS?
Open a ticket with the DoIT Ticketing team and provide a thorough description of the problem or question you have. The DoIT Ticketing team will try to answer the question and if they cannot, they will open a ticket with BMC on your behalf.

NEED HELP UNDERSTANDING AND PLANNING TO USE FOOTPRINTS?
Consulting and planning assistance is available upon request. Open a Service Request and select Server > Ticketing > Other or e-mail service@sfsu.edu.

IS FOOTPRINTS TRAINING AVAILABLE?
Training is available upon request and can be customized as needed. Open a Service Request and select Server > Ticketing > Other or e-mail service@sfsu.edu.

COMMENTS AND SUGGESTIONS
Please send any comments or suggestions for improving this guide to service@sfsu.edu.