Creating an Impact, Urgency and Priority matrix

a test category - (٠) تعليقات - Deskpro Trainer - 2021-03-24

It's often useful to set a Priority for tickets depending on the scale of the interruption they cause to your organization (Impact) and the speed in which they need to be fixed .((Urgency

This is a key component of ITIL incident management and one which you can setup in .Deskpro using a combination of three custom fields and a few triggers

Simple Worked Example

.Im my example I'm going to set the following options for Impact and Urgency

:Urgency

High - Critical service cannot be delivered

Medium - Non-critical service cannot be delivered

Low - Task that cannot be completed is non-time sensitive

Impact

High - Affects the whole organization

Medium - Affects groups of users across the organization but not everyone

Low - Affects a single user

We're then going to use these values to set a priority per the matrix table below (1 :(obviously being highest priority and 3 the lowest

		Urgency	
Low (task that cannot be completed is non-time (sensitive	Medium (non-critical service cannot be (delivered	High (Critical service cannot be (delivered	Impact
2	1	1	High (Affects the whole (organization
3	2	1	Medium (Affects groups of (users
3	3	2	Low (Affects a (single user

	Urgency		
Impact	High (Critical service cannot be delivered)	Medium (non-critical service cannot be delivered)	Low (task that cannot be completed is non-time sensitive)
High (Affects the whole organization)	1	1	2
Medium (Affects groups of users)	1	2	3
Low (Affects a single user)	2	3	3

Deskpro Workflow

The workflow I want to create is one where when a user submits a ticket they set the .Urgency and the Impact

When submitted a Priority is then generated by the system and is then shown on the ticket .in the agent interface

.To do this we'll need to create three custom fields and three triggers

Custom Fields

.If we go to Admin > Tickets > Custom fields we can create our fields here

Note there are default Urgency and Priority fields in the system but these aren't particularly .flexible so for this workflow I would advise you create custom fields

Urgency and Impact

The Impact and Urgency fields are essentially going to be the same in this example but with .different titles so I'll just run through the Urgency setup

Hit the add button and choose the Predefined Choices field type (1

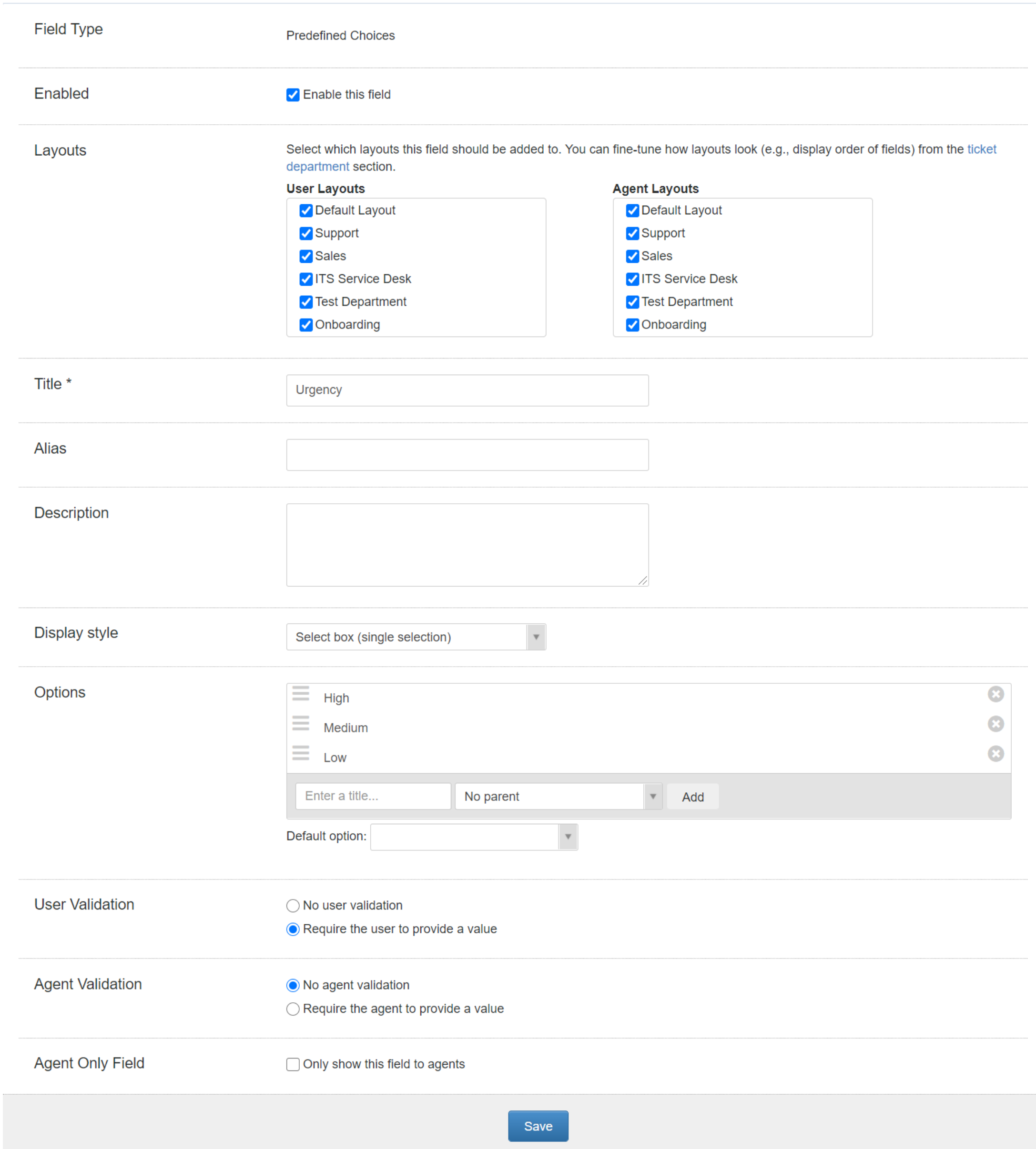
Specify your field title (2

Specify your field options (3

Select the ticket layouts you want the field to show on (I'm going to add mine to all (4 departments on both agent and user side but you may want these to only show to the user .(but that's up to you

Choose whether you want the field to be required when a user submits a ticket (I do so (5 .(I've selected 'Require the user to provide a value' under user validation

:The layout should look something like the below



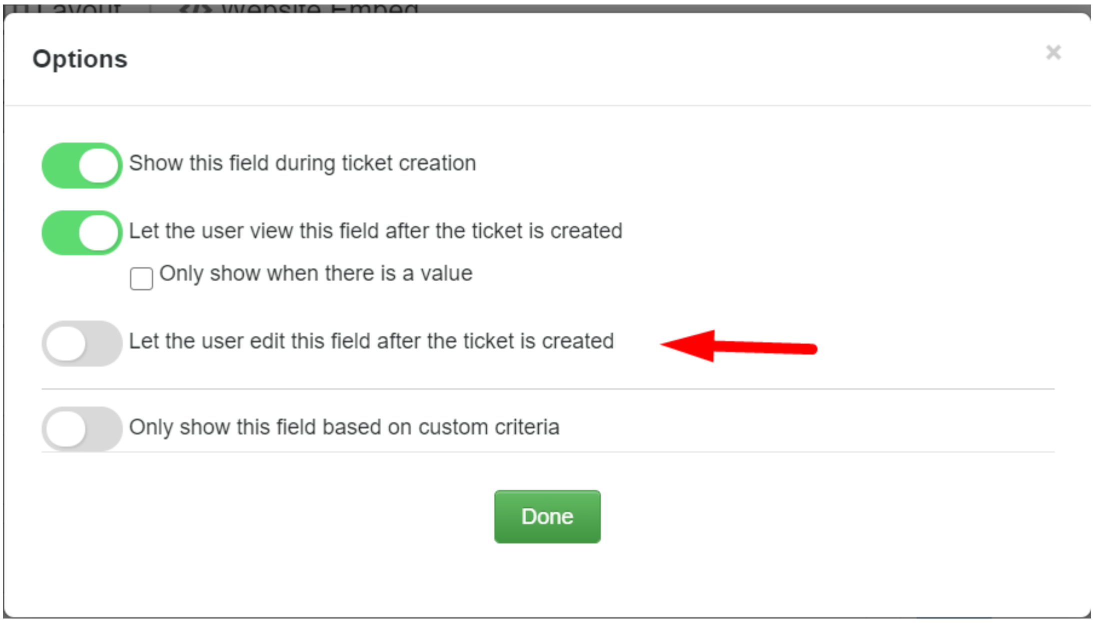
The final optional step is to limit the user's ability to change the field once the ticket has (6

.been submitted

.Once it has gone into your helpdesk you may want agents to have control of this

To do this go to Admin > Tickets > Department > 'Department title' > Layout > User Form

Here click on the cog next to the Urgency field and deselect the 'Let the user edit the field .after the ticket is created' option



.Then repeat the same for the Impact field

Priority

.The setup for the Priority field is fairly similar but we're going to limit it to the agent side

Hit the add button and choose the Predefined Choices field type (1

Specify your field title (2

Specify your field options (3

Select the ticket layouts you want the field to show on. This is the main point of (4 .difference from the other fields as we only want to add this to the agent side forms

Note as well we don't need to specify any validation options here as the field value is going .to be generated automatically anyway

We now have our fields setup and users are required to set Impact and Urgency when they submit the ticket. Now we just need to set up our automation to populate the priority field .as well

Triggers

At this point we need to create new ticket triggers for each Priority value of 1 to 3 based on .our matrix

We can do this in Admin > Tickets > New ticket triggers

Priority 1

If we refer back to our original Matrix at this point we can see that Priority 1 needs to be set :in three scenarios

Impact = High and Urgency = High

Impact = HIgh and Urgency = Medium

Impact = Medium and Urgency = High

:We can do this by following the steps below

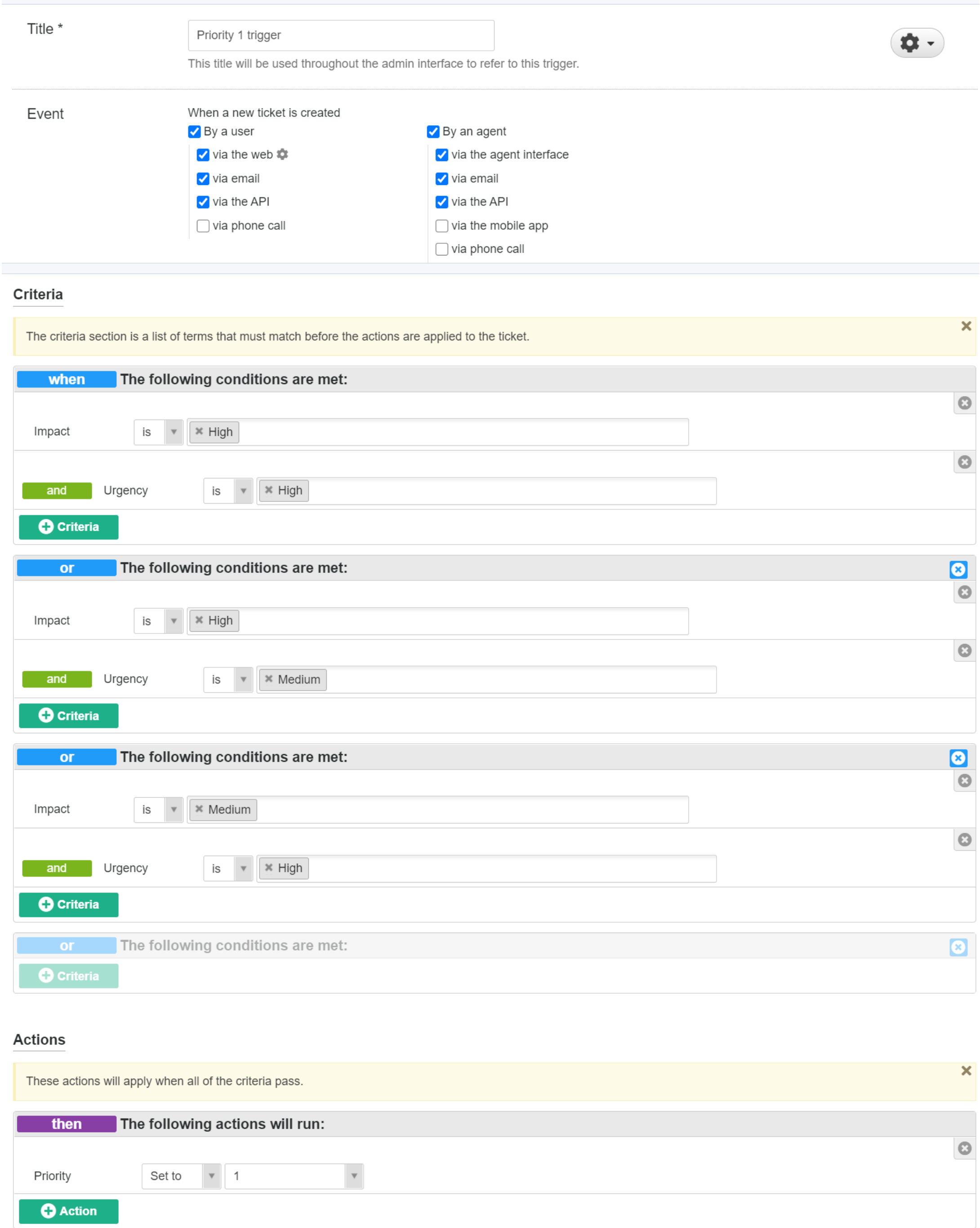
HIt add and set a title (1

Under the criteria section add a criteria of Impact = HIgh and Urgency = High (2

Then using the OR option add a criteria for Impact = High and Urgency = Medium then (3 do the same for Impact = Medium and Urgency = High

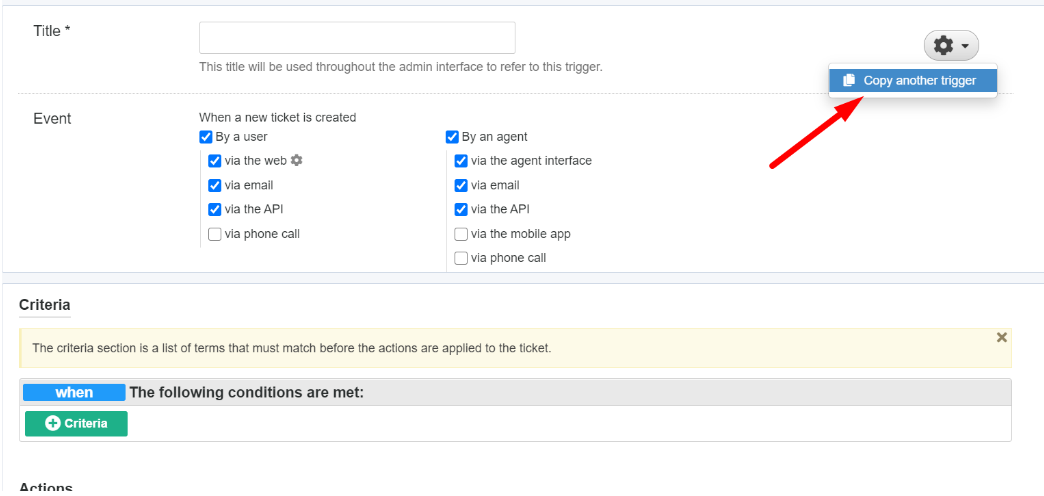
In the actions section add the action to set the Priority field to 1 (4

:The trigger should look similar to the below

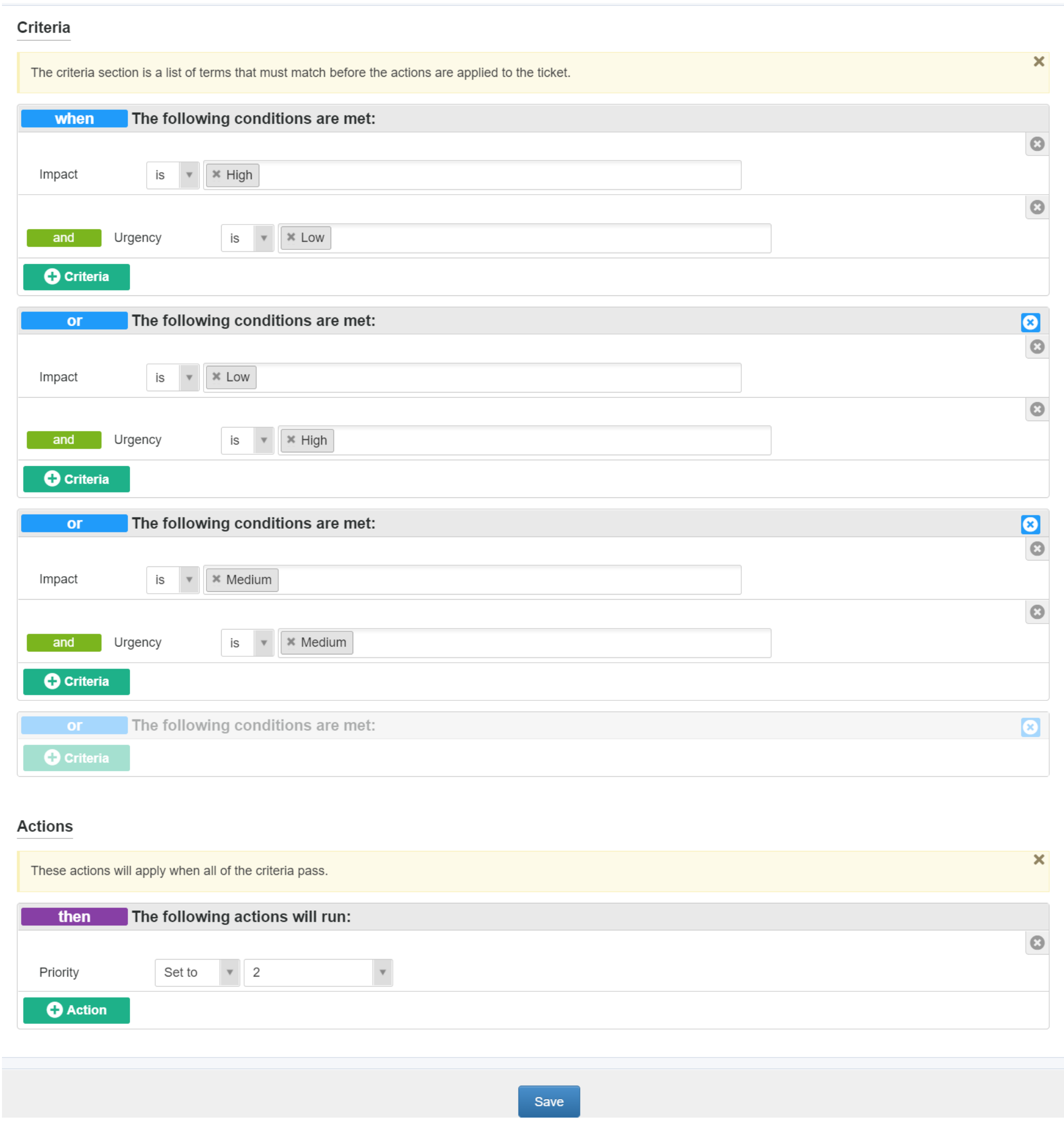


.We then simply need to create a trigger for each of the other values in our Priority field

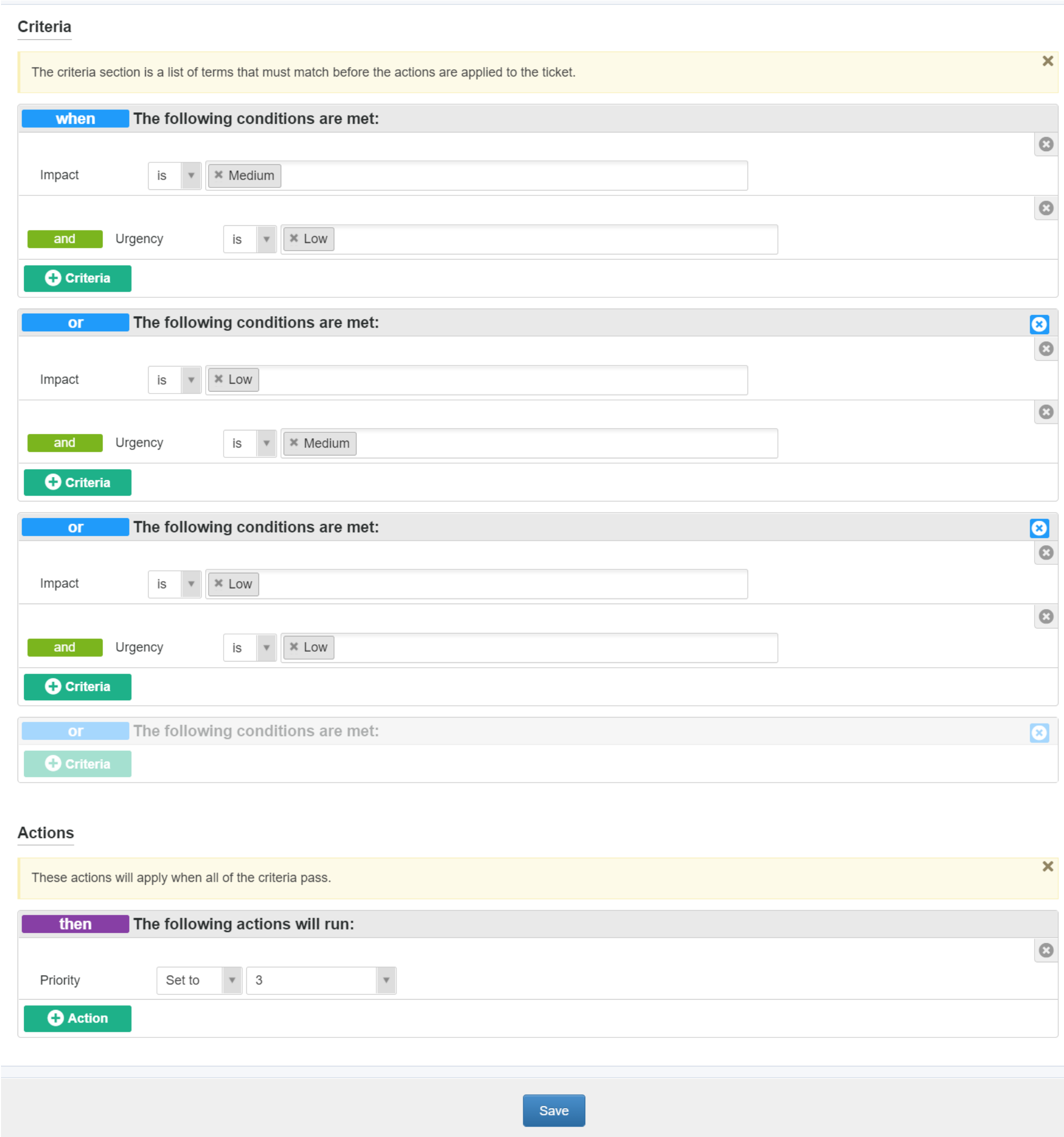
I would advise using the clone existing trigger option here so you can copy the one you've :just created and then you'll just have to change the values


Title *
This title will be used throughout the admin interface to refer to this trigger.
Copy another trigger
Event
When a new ticket is created
By a user
via the web
via email
via the API
via phone call
By an agent
via the agent interface
via email
via the API
via the mobile app
via phone call
Criteria
The criteria section is a list of terms that must match before the actions are applied to the ticket.
when
The following conditions are met:
Criteria
Actions

Priority 2


Criteria
The criteria section is a list of terms that must match before the actions are applied to the ticket.
when
The following conditions are met:
Impact
is
High
and
Urgency
is
Low
Criteria
or
The following conditions are met:
Impact
is
Low
and
Urgency
is
High
Criteria
or
The following conditions are met:
Impact
is
Medium
and
Urgency
is
Medium
Criteria
or
The following conditions are met:
Criteria
Actions
These actions will apply when all of the criteria pass.
then
The following actions will run:
Priority
Set to
2
Action
Save

Priority 3



Now the triggers are setup when the users submit a ticket they will be required to enter .Impact and Urgency values and a Priority value will then automatically be added

.Note in this example we are just using new ticket triggers to add a Priority to new tickets

If we wanted our agents and users to have the ability to change the Impact and Urgency values and we wanted the priority value to be updated by these changes we would need to .recreate the triggers above but as Ticket update triggers rather than new ticket triggers

البطاقات

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