# TIS Provisioning Process Procedures

## 1 Scope

These procedures document the steps necessary to participate in the TIS Provisioning Process activities as outlined in the workflow section.

## 2 Principles / Guidelines

This process has been designed with the following principles and guidelines in mind:

1. The TIS Provisioning Process is meant only for TIS.
2. Until a better option is available, SM7 will be used.
3. Build projects will be tracked using an incident, called the “Master Ticket”, so that all related information is collected in a central location. This information consists of task notes and external documents which are meant to be attached to the Master Ticket.
4. Every time a task is assigned to a TIS workgroup an incident, called a “Related Ticket”, is created, linked to the Master Ticket, and assigned to that workgroup’s incident queue.
5. Automated workgroup queue alert e-mails AND manually created e-mails are meant to be used as the primary communication method for intra-team communication.

## 3 Workflow

Refer to the following two flow diagrams for an overall layout of the process activities.



Figure 1 – Incident Flow



Figure 2 – Activities Workflow

## 4 Roles and Communication

The following roles are involved in the TIS Provisioning Process.

|  |  |  |
| --- | --- | --- |
| **Role** | **Typically Filled By** | **Activity Involvement** |
| Customer | IMITS Group | Purchasing Process |
| Purchase Tracking Clerk | TIS Assistant | Purchasing Process |
| Master Ticket Creator | TIS Service Manager | Master Ticket Creation |
| Master Ticket Owner | TIS Service Manager | Create Related Ticket,  Attach Documentation, Close Master Ticket |
| Related Ticket Owner | TIS Employee | Attach Documentation, Close Related Ticket |

Communication between the roles will occur as follows:



Figure 3 – Communication Flow



Figure 4 – Master / Related Ticket Flow

## 5 Procedures

5.1 Purchasing Process

|  |  |
| --- | --- |
| Description | |
| The purchasing process coordinates the acquisition of materials and involves many parties. The TIS Assistant acts as the central hub, driving the activities to completion and attaching all related materials to the Master Ticket. | |
| Pre-Conditions | |
| Before the Purchasing Process begins, a Master Ticket is created. The Master Ticket creator sends an e-mail with the ticket number to kick off the process. | |
| Roles | Involvement |
| Purchase Tracking Clerk | Sends reminder e-mails to drive the process to completion. Attaches all related documentation to the Master Ticket. |
| Service Manager(s) | Provides Quotes for the required Materials. |
| Customer | Provides Purchase Order(s) for the required materials. |
| TIS Analyst | Confirms that materials have arrived. |
| Purchasing | Receives materials in the corresponding Health Authority system. |
| Steps | |
| 1. TIS Assistant sends an e-mail reminder to the Service Managers to provide quotes for the materials required. 2. Service Manager(s) attach the quote(s) to the Master Ticket. Service Manager(s) e-mail the quotes to the Customer(s) with shipping instructions, CC’ing the TIS Assistant and the responsible TIS Analyst. 3. TIS Assistant sends an e-mail reminder to the Customer to provide the PO(s). 4. Customer(s) e-mail a copy of the PO(s) to the TIS Assistant. TIS Assistant attaches the PO(s) to the Master Ticket. 5. TIS Assistant sends an e-mail reminder to the responsible TIS Analyst to provide confirmation that the materials have arrived. 6. TIS Analyst sends an e-mail to confirm that the materials have arrived. 7. TIS Assistant sends an e-mail to purchasing instructing them to receive the materials in the correct Purchasing system. | |
| Post-Conditions | |
| When the Purchasing Process is finished, all purchasing documentation is attached to the Master Ticket and all materials are received and accounted for. | |

5.2 Create and Assign Master Ticket

|  |  |  |
| --- | --- | --- |
| Description | | |
| The Master Ticket is the central document in which provisioning activities are tracked. | | |
| Pre-Conditions | | |
| Before a Master Ticket can be created, an approved cost estimate must be arranged for from the Customer. | | |
| Roles | Involvement | |
| TIS Capacity Team | Creates master ticket and assigns to an SM. | |
| Steps | | Screenshot |
| 1. Select “New Incident” from the Menu Navigation branch of the Navigator panel. | |  |
| 1. Set the Status of the Ticket to “Work in Progress”. 2. Format the Title of the Ticket as follows: Build: <System Name> for <Customer Name> at <HA Name>  i.e. Build: MedWerks Colposcopy for Carol Brien at VCHA | |  |
| 1. Fill in the Required Fields in the Primary Contact section as follows:    1. Contact (RID): The SM who will be the Master Ticket Owner.    2. Health Authority: The HA in which the system will be implemented.    3. Agency/HSDA: Use “CORP”. | |  |
| 1. Fill in the Required Fields in the Incident Detail section as follows:    1. Affected Item: Use “DEVICE - SERVER”. You can type DEVICE and then click the Fill button  to speed this up.    2. Assignment: The SM’s group who will be the Master Ticket Owner.    3. Category: Use “request for change”.    4. Area: Use “hardware management”.    5. Sub-Area: Use “hardware install”.    6. Initial Impact: Use “3 – Multiple Users/Dept”.    7. Urgency: Use “4 – Low”. | |  |
| 1. Enter as much information as you currently have about the request into the Description field. | |  |
| 1. Click the “New” button in the button bar along the top. | |  |
| 1. Click on the “Open New Incident” button. | |  |
| 1. Click the “OK” button in the button bar along the top. | |  |
| 1. Send an e-mail to the TIS Assistant informing them of the ticket number to kick off the Purchasing Process. | | |
| Post-Conditions | | |
| A master ticket is created and assigned to the Service Manager who will act as the Master Ticket owner. | | |

5.3 Attach Documentation to Ticket

|  |  |  |
| --- | --- | --- |
| Description | | |
| All related documentation should be attached to the Master Ticket for future reference. | | |
| Pre-Conditions | | |
| A Master Ticket must have been previously created. The file that you wish to attach must be accessible using Windows Explorer. | | |
| Roles | Involvement | |
| Any | Attach documentation to the Master Ticket. | |
| Steps | | |
| 1. Open the existing Master Ticket from the Incident queue. | |  |
| 1. Click on the Attachment tab, then one the Add File… button. In the resulting pop-up windows, click on the Browse button. | |  |
| 1. Browse to the file, select it and then click on the Open button. | |  |
| 1. Click on the OK button. | |  |
| 1. Verify that the file is added to the list of files under the Attachment tab. | |  |
| Post-Conditions | | |
| The document is attached to the Master Ticket. | | |

5.4 Create and Assign Related Tickets

|  |  |  |
| --- | --- | --- |
| Description | | |
| Related Tickets are the method used to track work assigned to a specific TIS workgroup. | | |
| Pre-Conditions | | |
| A Master Ticket for the system build must have been previously created. | | |
| Roles | Involvement | |
| Master Ticket Owner | Creates Related Ticket(s) and Assigns to TIS Workgroup. | |
| Steps | | Screenshot |
| 1. Open the existing Master Ticket from the Incident queue. Make note of the incident number as this will be needed later. | |  |
| 1. In the top-right corner of the window, click the “Detail Options” button, then client “Clone” from the resulting drop-down menu. | |  |
| 1. In the new, cloned incident, change the part of the Incident Title that reads “Task:” to read “Build:” instead so that it can be differentiated from the Master Ticket. | |  |
| 1. Change the Assignment to the TIS workgroup that you are assigning work to. | |  |
| 1. Change the description to denote exactly what is being requested of that workgroup. | |  |
| 1. Before we can associate the ticket, it must be saved. | |  |
| 1. Click on the “Related Records” tab, then on the “Incident” tab, then on the “Associate Incident” button. | |  |
| 1. I hope you remembered the Master Ticket incident number, I did warn you in step 1. You can Search for it or simply type it here and click the “OK” button | |  |
| 1. Click the “Close” button. | |  |
| Post-Conditions | | |
| A Related Ticket is created, linked to the Master Ticket, and assigned to the correct TIS workgroup. | | |

5.5 Close Related Ticket and Create Journal Entry

|  |  |  |
| --- | --- | --- |
| Description | | |
| Once the work requested by a Related Ticket is completed, the Related Ticket is closed and a Journal Entry is created on the Master Ticket. | | |
| Pre-Conditions | | |
| A Master Ticket and an associated Related Ticket must have been created previously. | | |
| Roles | Involvement | |
| Related Ticket Owner | Closes related ticket and makes journal entry in master ticket. | |
| Steps | | Screenshot |
| 1. Open the Related Ticket from the Incident Queue. | |  |
| 1. In the top-right, change the Ticket Status to “Resolved”. | |  |
| 1. Note the Ticket Number of this Related Ticket for later reference. | |  |
| 1. Also make note of the Ticket Number of the Master Ticket that this ticket is related to. You can find this quickly by clicking on the “Related Records” tab, then on the “Incidents” tab. | |  |
| 1. Click the Close button. | |  |
| 1. Click on “Permanent”, then select “Completed Change” from the closure code drop-down menu. Make a short statement in the Resolution text box area but keep in mind that your real notes will be made in the Master Ticket. | |  |
| 1. Click the Save button. | |  |
| 1. Now, navigate to the Master Ticket you made note of earlier. You can use the Search Incidents menu option to do this quickly. | |  |
| 1. In the Master ticket window, click on the Activities tab. Click on the Type drop-down box, and Select “Update from Support Staff”. | |  |
| 1. Type whatever information is pertinent into the large textbox provided, then click on the | |  |
| 1. The Master ticket is updated with a Journal Entry which can be viewed from within the Master Ticket by clicking on the Activities tab, then the Journal Updates tab. | |  |
| 1. Lastly, send an e-mail to the owner of this Master Ticket informing them that your Related ticket is Resolved including a brief description of the steps taken to resolve the ticket (the work you did). You can find the Master Ticket owner’s e-mail address by clicking on the Incident Detail tab and looking in the Contact Phone # field. | |  |
| Post-Conditions | | |
| The Related Ticket is closed, a journal entry is created within the Master Ticket and the Master Ticket owner is informed via e-mail of the work that was completed. | | |

## 6 Checklists

6.1 TIS Capacity Team Representative

* The Master Ticket’s title adheres to the format “Build: <System Name> for <Customer Name> at <HA Name>”.
* The Master Ticket’s contact is the Service Manager who will be responsible for the project build activities.
* The Master Ticket’s description includes all of the information known at this time.
* All related documentation (quotes, SAF, SOW, design docs, etc.) is attached to the Master Ticket.
* An e-mail has been sent to the TIS Assistant informing them of the ticket #, the title, and the materials that are due to be collected.

6.2 Master Ticket Owner Checklist

* All technical documents related to the build are attached to the Master Ticket.
* Related Tickets are cloned from the Master Ticket and assigned to the correct workgroup queue for all work needed in the correct sequence (see Figure 4 – Master / Related Ticket Flow)
* Related Ticket titles adhere to the format “Task: <System Name> for <Customer Name> at <HA Name>” where system, customer and HA information matches the Master Ticket title.
* Related Tickets are associated with the correct Master Ticket.
* The status of the Master Ticket has been changed to “Resolved” once the Build is complete.

6.3 Related Ticket Owner Checklist

* The work requested in the Related Ticket is completed as stated in the description or has been changed and completed after an agreement with the Master Ticket owner.
* The status of the Related Ticket has been changed to “Resolved” once the Task is complete.
* A Journal Entry has been created in the Master Ticket denoting the Related Ticket ID and describing any work completed as part of the Related Ticket.
* An e-mail has been sent to the Master Ticket owner informing them that the Related Ticket has been completed.