



Understanding Approvals and General Ticket Actions

Team Metalogic Partner Portal

SUMMARY

In this document, we will show you the workflow of tickets requiring actions and approval through the Team Metalogic Partner Portal.

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1. How do ticket actions work in the portal?

Certain tickets, especially for equipment purchases and HR matters, may need to go through an internal approval process before they reach our Service Desk for completion. Sometimes, the action may be simpler – such as to escalate the ticket to another team. There’s also the more day-to-day actions like cancelling, closing, and re-opening tickets.

If you are listed as a Primary Contact, knowing this process helps you understand exactly what to expect.

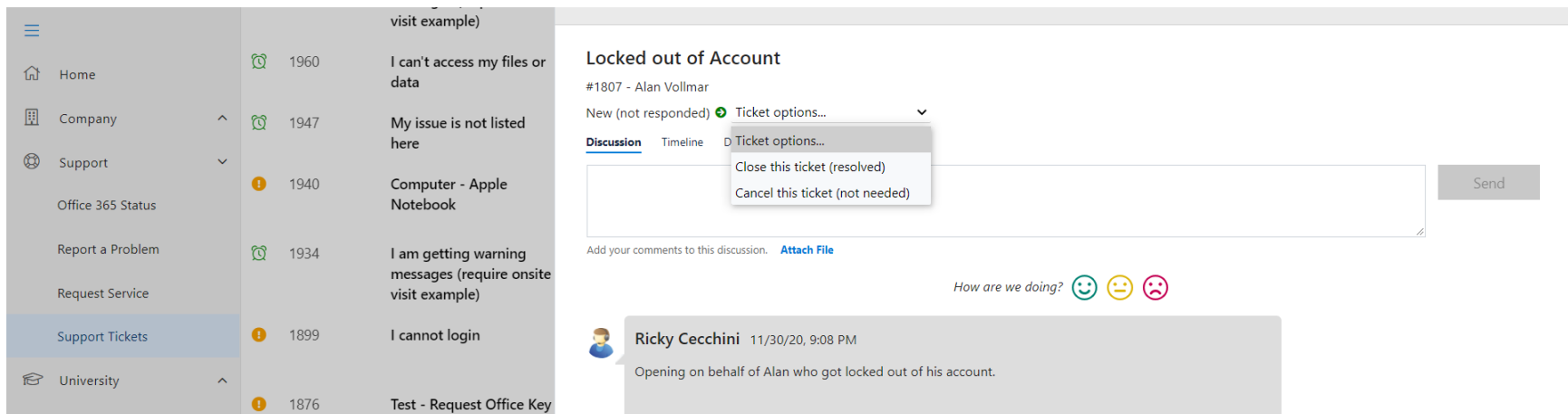
2. General Ticket Actions

In most cases, you have the option of taking an action with your tickets (both open and closed). If you select an open ticket from the **Support > Support Tickets** area, you’ll have the option of using a drop-down menu to select your action.

Most commonly, these actions are:

- **Close** a ticket
- **Cancel** a ticket
- **Re-Open** a ticket

However, depending on your role and company settings, you may see more or less than what’s described above.



3. Understanding Approval Workflows

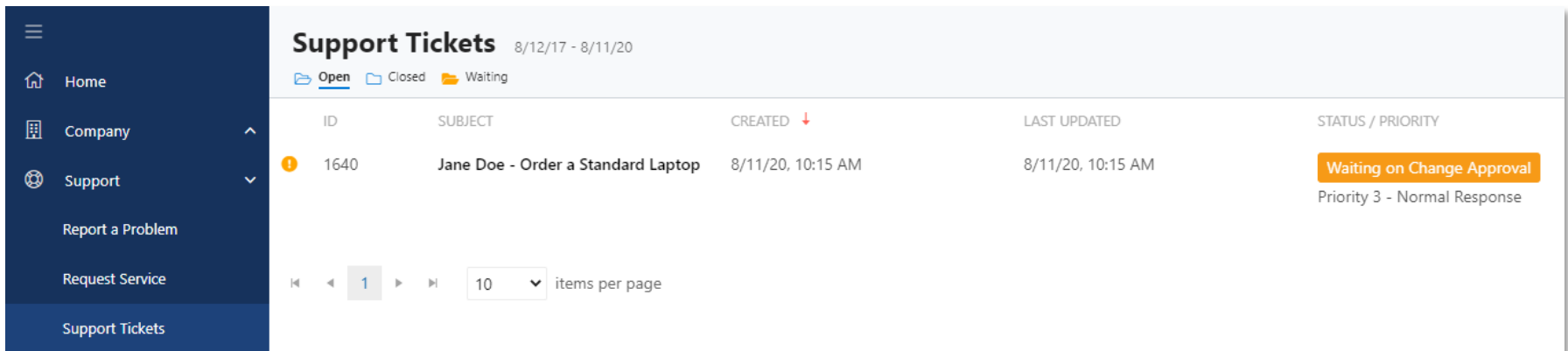
Some tickets may require more intricate actions, such as those requiring approvals.

There are **3 total steps** to tickets requiring an approval. They are:

1. **The ticket submission by a user**
2. **The Primary Contact notification**
3. **The approval or denial**

4. The Ticket Submission by a User

When a user submits a ticket that requires an approval, they will be able to track and see the status via the **Support Tickets** area of the sidebar. The user (and those with global ticket viewing rights) will see this displayed like the image below, both in the *Open* tab (which shows all open tickets, including those needing approval) and the *Waiting* tab (which shows only those needing approval).



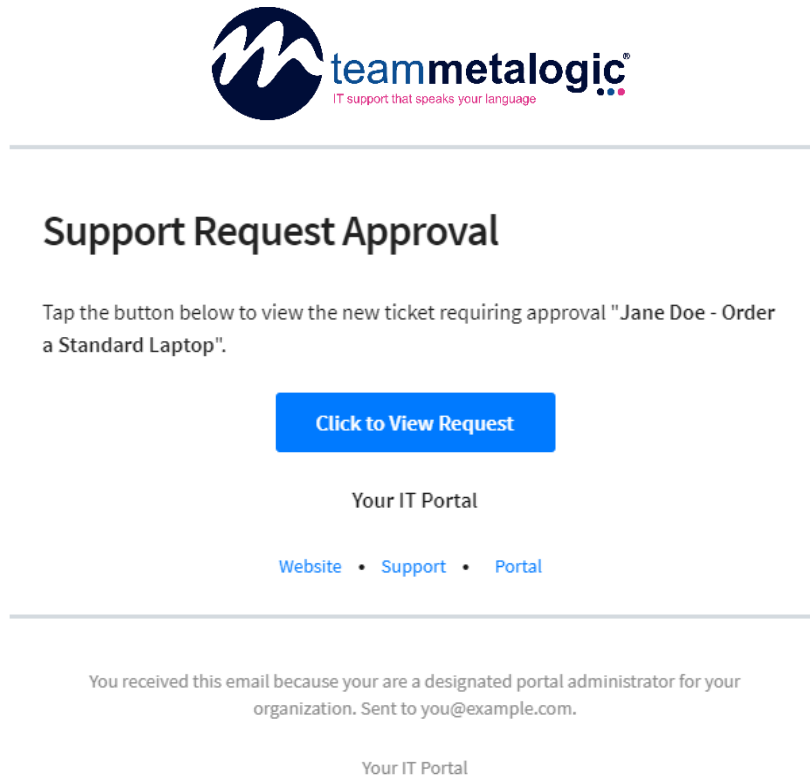
The screenshot displays the 'Support Tickets' interface. On the left is a dark blue sidebar with navigation options: Home, Company, Support, Report a Problem, Request Service, and Support Tickets. The main content area is titled 'Support Tickets' with a date range of '8/12/17 - 8/11/20'. Below the title are tabs for 'Open', 'Closed', and 'Waiting'. The 'Waiting' tab is active. A table lists tickets with columns for ID, SUBJECT, CREATED, LAST UPDATED, and STATUS / PRIORITY. One ticket is shown with ID 1640, SUBJECT 'Jane Doe - Order a Standard Laptop', CREATED '8/11/20, 10:15 AM', and LAST UPDATED '8/11/20, 10:15 AM'. The status is 'Waiting on Change Approval' (highlighted in orange) and 'Priority 3 - Normal Response'. At the bottom, there is a pagination control showing '1' of 10 items per page.

ID	SUBJECT	CREATED	LAST UPDATED	STATUS / PRIORITY
1640	Jane Doe - Order a Standard Laptop	8/11/20, 10:15 AM	8/11/20, 10:15 AM	Waiting on Change Approval Priority 3 - Normal Response

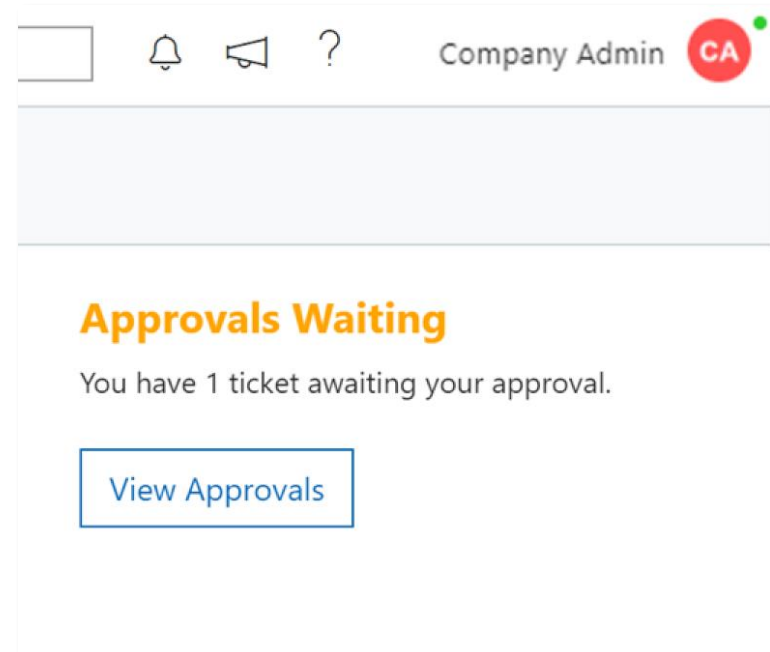
5. The Approver Notification

With the portal, we can select specific tickets that require approval – as well as their respective approver(s). If you are one of the individuals that is elected to approve tickets, you will be **notified in two distinct ways** – both **via email** and **in the portal**.

The **email** that you will receive in your inbox:

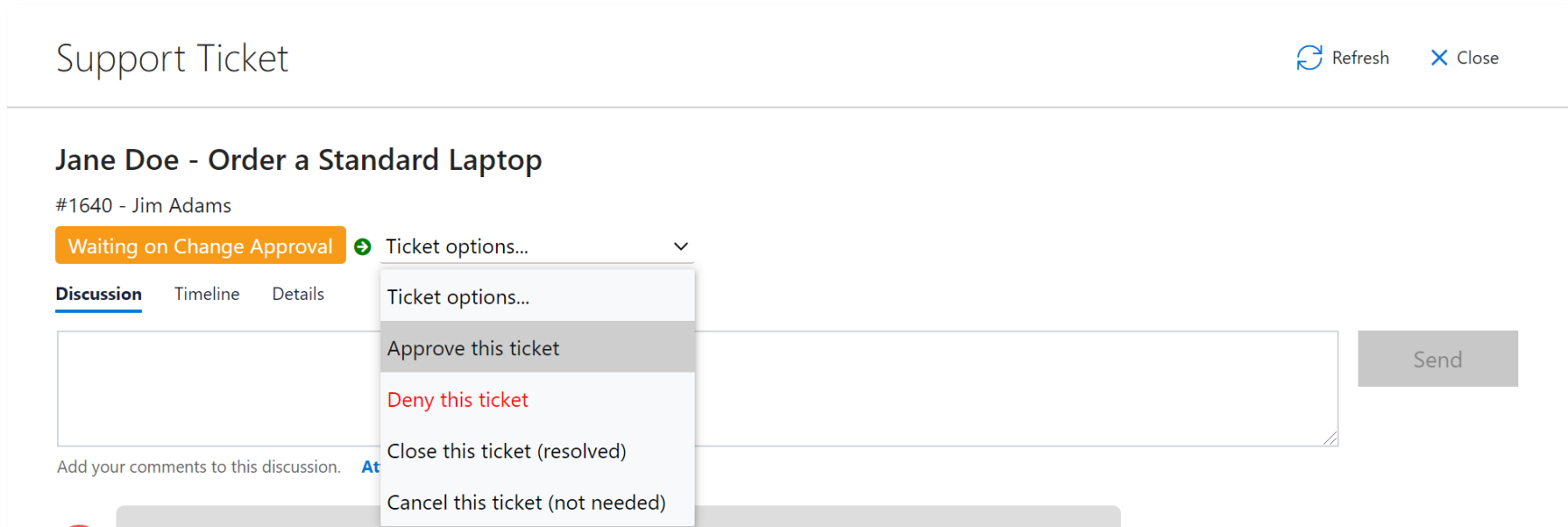


The **portal message** that you will receive on the homepage:



6. Approving or Denying a Ticket

Once the approver is ready to approve or deny the ticket, the link in the email or the button in the portal will take them to the **Support Tickets** area. Tickets requiring internal approval will be marked with a status containing an **orange** tag.



The screenshot shows a 'Support Ticket' interface. At the top right, there are 'Refresh' and 'Close' buttons. The ticket title is 'Jane Doe - Order a Standard Laptop' with ID '#1640 - Jim Adams'. The status is 'Waiting on Change Approval' (highlighted in orange) and 'Ticket options...' (with a dropdown arrow). Below the status, there are tabs for 'Discussion', 'Timeline', and 'Details'. A text input field is present with a 'Send' button to its right. A dropdown menu is open over the 'Ticket options...' button, listing the following actions: 'Ticket options...', 'Approve this ticket', 'Deny this ticket', 'Close this ticket (resolved)', and 'Cancel this ticket (not needed)'. Below the input field, there is a prompt: 'Add your comments to this discussion. At'.

Two things can happen to the ticket at this stage.

- If the ticket is **approved**, it will be sent to our team for fulfillment.
- If the ticket is **denied**, the ticket will move to a different status and close/resolve itself.

There may be other actions in your portal (such as escalation processes), but the general flow will be similar to what's listed here.