SOP Template: Initial Issue Logging and Ticket Creation

This SOP details the process for **initial issue logging and ticket creation**, including the identification of problems, accurate documentation of issue details, prioritization based on severity, assignment to appropriate teams, and timely creation of support tickets. The goal is to ensure efficient tracking and resolution of reported issues, enhancing communication and accountability within the support workflow.

> **Scope:** This SOP applies to all staff involved in technical support, IT helpdesk, or customer service roles responsible for receiving, documenting, and routing reported issues.

1. Identify and Verify the Issue

1. Receive the issue report via designated channels (e.g., email, phone, ticket portal).
2. Confirm the identity and contact details of the requester.
3. Clarify and understand the reported problem-ask targeted questions if necessary.
4. Check for duplicate or previously logged issues to avoid redundancy.

2. Gather and Document Issue Details

1. Collect all relevant information, such as:
   - Requester Name and Contact Information
   - Date/Time Reported
   - Impacted System/Service/Application
   - Issue Description and Error Messages
   - Steps to Replicate (if applicable)
   - Screenshots or logs (if available)
2. Ensure accuracy and completeness when entering details into the ticketing system.

3. Assess Severity and Prioritize

Severity Level	Description	Example
Critical	System-wide outage; business operations halted	All users unable to access email
High	Major functionality impacted; significant user disruption	Payment system failing for customers
Medium	Partial service degradation; workaround available	Intermittent connectivity issues
Low	Minor issue; no significant impact on work	Cosmetic UI bug

1. Consult the severity matrix and assign appropriate priority to the ticket.
2. Escalate immediately if critical or business-impacting.

4. Ticket Creation and Assignment

1. Open a new support ticket in the designated ticketing system.
2. Fill in all required fields, including:
   - Requester/contact information
   - Issue category and subcategory
   - Detailed description and supporting evidence
   - Assigned severity/priority
3. Assign the ticket to the relevant support group/team based on the issue type.
4. Mark as "New" or "Open" and confirm assignment.

5. Notification and Communication

1. Send an acknowledgment email/notification to the requester, including ticket reference number and summary.
2. Inform or tag the assigned team on ticket assignment if required by process.
3. Document any initial actions taken or pending follow-ups in the ticket comments.

6. Quality Control & Review

1. Supervisors or designated quality controllers may review logged tickets for completeness and accuracy.
2. Provide feedback or corrections as necessary before proceeding to resolution steps.

References & Related Documents

- Incident/Service Request Classification Guide
- Ticket Escalation Matrix
- Knowledge Base / FAQs

Revision History

Date	Author	Description
2024-06-20	Support Team	Initial creation of SOP template