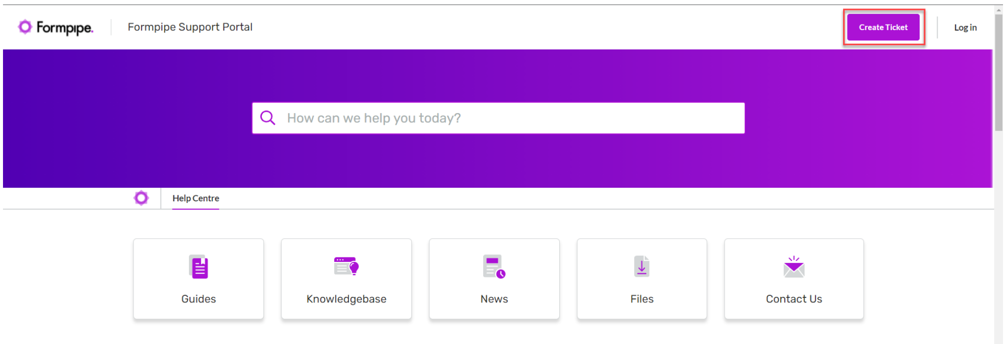
Formpipe Support - Best Practices for Raising Tickets

Jason Gillan - 2024-01-23 - Comments (0) - General

Submitting a Support Request

When Formpipe carries out an initial evaluation of a support case, we are limited to the information contained within the ticket. To ensure that there are no delays in investigating the issue, that time is not lost repeating previously completed actions or miscommunication as to what the actual issue is, it is essential that all relevant details are provided as early as possible. Whilst many details below may seem irrelevant, the background and history around an issue are sometimes critical to identify the root cause.

The recommended way to submit a Support Request is by using the **Create Ticket** button at the top of the portal:



Some fields are mandatory to fill out when creating a ticket to ensure the ticket goes to the right team and is picked up with the correct priority. As well as the mandatory fields, all tickets should provide other essential information, including but not limited to:

1. Description of the issue

The initial key information is a description of an issue; this should contain as much detail as possible and accurately describe what is observed during the issue in question. Screenshots should be supplied if relevant.

2. The business impact of the issue

While all issues are important, the severity of the issue can vary. A brief description of the impact the issue is having on the day-to-day activities or project implementation will allow the agent to properly prioritise the issue.

The impact is measured in Priority, when reporting tickets via the Portal the Priority should always be set. The following priorities are available:

Priority	Description
Critical	Issues affecting an existing live production system in Production Mode where business operations are being significantly affected. “Production Mode” means the use of the Software, as contemplated by its accompanying Documentation, by your users for your internal purposes and not for testing purposes
Major	Issues that are not classed as Priority 1 on a production envrionment. This includes existing production system issues that are still mostly functioning or where workarounds are available. Business operations are still affected but day to day business can still run. For example performance issues.
Normal	Issues on production with very minor impact, or issues on a test or development server.
Minor	How to questions or other issues that are not affecting the business in any meaningful way.

3. Steps to reproduce

If the issue is reproducible, detailed steps into what caused the issue with screenshots will speed up the investigation by Support; this should include expected behaviour and actual behaviour. If the issue can’t be reproduced then details on what happened prior to the issue being seen should be provided and allow Support to get a better understanding of the affected area.

4. Troubleshooting attempted

Before contacting Support it is advisable for the team responsible for the servers/software to perform some troubleshooting steps themselves using their technical ability. It is strongly recommended to refer to and use details supplied on the Support Portal and in the manuals where applicable (if available). Rather than repeating the same troubleshooting steps already attempted, please supply details of what was attempted to reduce time and avoid wasted effort in understanding the cause.

5. Recent changes

At times, seemingly unrelated changes to the related server(s)/infrastructure could cause issues with the software. Detailing all recent changes allows the Support Agent to confirm whether the changes could have caused the issue observed.

6. Logs and data samples

All relevant logs and samples of data related to the issue (if appropriate) should be sent along with the ticket. Normally, the logs contain a lot of detail and information that the assigned Agent can use to help diagnose the issue. If these aren’t supplied, the first response from the Agent will normally be to request the logs before starting the investigation.

Related Content

- Support Service Request
- Formpipe Support - Making the most of the Support Experience
- Formpipe Support - Best Practices for System Maintenance