



TICKET SYSTEM WORKFLOW

Every issue. One ticket. No shortcuts.

A real person answers the phone. Fry builds the ticket behind them. Every issue walks to a documented, verified close — if it is not in Halo, it did not happen.

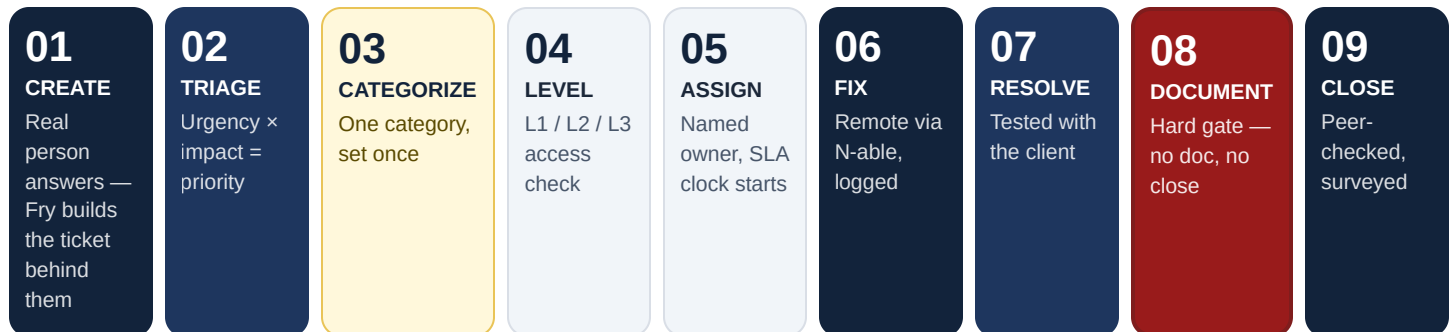
The rule that runs everything: call → ticket → triage → assignment → fix → resolve → document.

A ticket **cannot close** until its fix is documented. That gate is hard — not a suggestion, not a reminder. Halo enforces it.

HARD GATE
Step 8 blocks Step 9

The chain at a glance — nine steps, one direction

Read left to right. Every ticket walks the same nine steps. Steps 1–5 get the right person on the right problem. Steps 6–9 prove it was fixed.

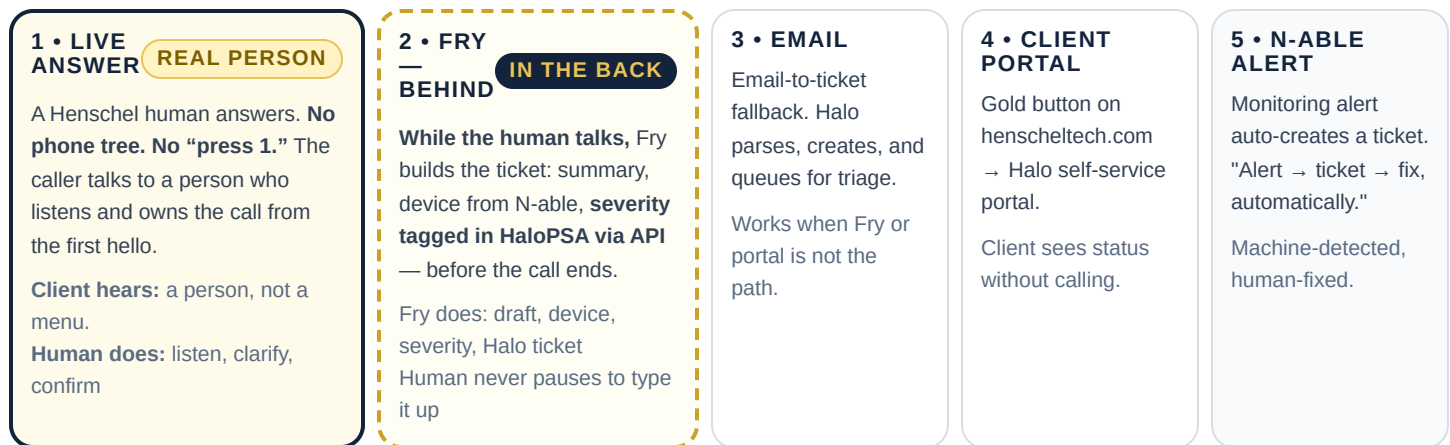


→ flow is always forward | escalation moves up a tier, never sideways

HaloPSA is the system of record

How a ticket is born — human up front, machine in the back

Human up front, machine in the back. A real Henschel person answers the phone — no phone tree, no “press 1,” no menu maze. While that person is talking to the caller, Fry is already building the ticket in HaloPSA in the background.



If it is not in Halo, it did not happen.

Side chats, texts, and hallway fixes do not count until they are a ticket.

One ticket, one owner.

Every ticket has a single named assignee. Shared ownership is no ownership.

No ticket, no work.

Create first, troubleshoot second. The clock and the record start at creation.



Triage decides everything downstream

Triage happens once, right after creation. The dispatcher (Louis, as owner / L3 + dispatcher) confirms what Fry or the intake suggested. Get triage right and the rest of the chain is just execution. Get it wrong and the ticket bounces.

PRIORITY = URGENCY × IMPACT

	HIGH IMPACT Many users / business down	MEDIUM IMPACT Team or process blocked	LOW IMPACT One user, workaround exists
High urgency Work stopped now	P1 CRITICAL	P1	P2
Medium urgency Degraded, not down	P1	P2	P3
Low urgency Request / question	P2	P3	P4

P1 — Critical
Business down.
All hands.
Immediate
assignment.

P2 — High
Major function
broken. Same-
day focus.

P3 — Standard
Normal queue.
Workaround
may exist.

P4 — Low / Request
How-to, access,
planned work.

Mis-prioritized? Re-triage it. The dispatcher can move priority up or down — but the ticket never skips triage, even for a P1. A P1 just gets triaged faster.

ONE CATEGORY, SET AT TRIAGE

Category drives routing, reporting, and who is allowed to touch the ticket. Exactly one per ticket.

ACCESS & ACCOUNTS

EMAIL & M365

NETWORK & INTERNET

HARDWARE / DEVICE

SOFTWARE / APP

PHONES & UCAAS

SECURITY

BACKUP & RECOVERY

ONBOARDING / OFFBOARDING

PROCUREMENT

OTHER — MUST EXPLAIN

WHAT TRIAGE CAPTURES

- **Who** is affected and **how many**
- **What** stopped working (in the client's words + tech summary)
- **Device / site** — from N-able asset Fry captured behind the call
- **Priority** (P1–P4) + **category** + suggested tier
- **SLA clock** starts at assignment, not at first reply

AUTOMATION VS. HUMAN AT TRIAGE

MACHINE

Fry proposes severity, category, and summary from the live call. Halo routes by rule and starts timers.

HUMAN

Dispatcher confirms or corrects priority and category. Judgment lives here.

The swimlane — who owns each step

LANE	OWNS	SYSTEM
Client / Live Answer	Calls a real person (no phone tree); Fry builds ticket behind call; confirms fix (Step 7)	Phone (human) + Fry / Halo
Dispatcher Louis — L3	Triage, priority, category, assignment, escalation calls (Steps 2–5)	HaloPSA
L1 — First touch	Password, how-to, known fixes, intake quality, documentation draft	Halo + N-able (attended)
L2 — Fix owner	Most P2/P3 fixes, peer-checks L1 documentation	Halo + N-able + Passportal
L3 — Escalation Louis	P1s, security, network, approvals, spot-checks L2 docs	All systems
System	Auto-tickets, routing, SLA timers, documentation gate	Halo + N-able



Who can touch what — tiers and access

Access follows the ticket, not the person asking. If your tier does not cover it, you escalate — you do not borrow credentials or work around the gate.

L1 — FIRST TOUCH
2 TECHS IN 5-PERSON MODEL

- Intake quality, Fry ticket cleanup
- Passwords, MFA resets, how-tos
- Known-error fixes from the KB
- N-able *attended* sessions (client present)
- Reads Passportal; drafts documentation

Escalates when: fix needs admin rights, touches network/security, or exceeds 30 min without progress.

L2 — FIX OWNER
CORE TIER
FIX OWNER

- Owns most P2 / P3 tickets end-to-end
- N-able attended + unattended remote fix
- Writes and owns the documentation block
- Peer-checks L1 documentation before close
- M365, endpoints, standard network changes

Escalates when: P1, security incident, design change, or client-impacting risk.

L3 — ESCALATION
LOUIS

- All P1s, security, network architecture
- Approvals, vendor escalations, client comms on criticals
- Spot-checks L2 documentation
- Dispatcher duties: triage + assignment
- Full admin across Halo, N-able, Passportal, M365

One kill switch: Entra ID. Disable the account and Halo, N-able, Passportal, and M365 access ends everywhere.

ASSIGNMENT — CATEGORY + COMPLEXITY ROUTES THE TICKET

SIGNAL	ROUTES TO
Password / how-to / known fix	L1 — queue
Endpoint, M365, app, standard network	L2 — named owner
P1, security, outage, design decision	L3 (Louis) — immediate
Phones / UCaaS (Henschel Communications)	L2 with L3 on standby

Assignment is a handshake: the assignee accepts in Halo and the SLA clock is visible to the client in the portal. Reassignment keeps the same ticket — history never splits.

ESCALATION IS UPWARD, NOT SIDEWAYS

L1 → L2 → L3 / LOUIS

Escalate with notes, not just a handoff. The receiving tier should not have to re-ask the client what L1 already learned. Add: what you tried, what you ruled out, and the N-able session link.

Fix and resolve — Steps 6 and 7

06
REMOTE FIX VIA N-ABLE

Launch the session *from the ticket*. Attended when the client needs to be present; unattended for approved background work. Every session is logged back to the ticket — start, end, tech, device.

N-ABLE N-SIGHT **SESSION LOGGED**

→

07
RESOLVE — TESTED WITH THE CLIENT

A fix is not done until it is tested. Tech verifies, client confirms. Note the resolution on the ticket in plain language the client will read in the portal.

Not resolved: "rebooted it" with no test. **Resolved:** "Outlook sends/receives; client confirmed at 2:14 PM."



08 STEP 08 — HARD GATE Document — or it does not close

Halo will not let a ticket close with an incomplete documentation block. This is the most important enforcement in the whole system. It protects the next tech, the client, and the record.

GATE RESULT
**Missing field =
Close blocked**

THE FIVE REQUIRED FIELDS — EVERY TICKET, EVERY TIME

1. What broke

Symptom and scope in one or two sentences.
What the client saw.

2. Root cause

Why it broke — not just what you clicked. If unknown, say so and what you ruled out.

3. What you did

Exact steps, settings changed, N-able session linked.
Reproducible by the next tech.

4. How you verified

Test performed + client confirmation (who, when). Step 7 lives here.

5. Prevent next time

Monitoring, patch, doc, or training that stops recurrence — or "none, one-off" with reason.

Documentation lives in **Passportal**, linked from the Halo ticket. Halo holds the ticket; Passportal holds the durable knowledge. The link goes both ways.

09 • CLOSE AND REVIEW

AFTER THE GATE

- **L1 tickets:** L2 peer-checks the documentation before close
- **L2 tickets:** Louis spot-checks on a weekly review
- Close note is client-readable — no internal shorthand
- Client survey follows the closed ticket
- Weekly doc review: incomplete patterns get coached, not just corrected

SYSTEMS MAP — ONE LOOP, IDENTITY AT THE CENTER

Entra ID / M365

Identity, SSO, one kill switch

HaloPSA

Tickets, triage, SLA, gate

N-able N-sight

Monitoring, alerts, remote fix

Passportal

Documentation + vault, linked to ticket

Fry works behind the live answer, creating Halo tickets via API while the human talks. Halo is the record. N-able is the muscle. Passportal is the memory.

Automation vs. human — all at once

MACHINE DOES — FLOW

- Builds tickets behind the human (Fry API) + email / N-able
- Proposes severity/category, routes by rule
- Starts SLA timers, sends status to the portal
- Logs N-able sessions to the ticket
- **Blocks close** when documentation is incomplete

HUMAN DOES — JUDGMENT

- Validates triage; owns priority calls
- Decides the fix; talks to the client
- Verifies resolution with the client
- Writes the five-field documentation block
- Peer-checks and coaches — quality is human

WALL RULES — AUDIT US FROM THE BOARD

1. No ticket, no work.

Create first, fix second.

2. One ticket, one owner.

Name on it, clock on it.

3. Triage once, triage right.

Priority + category at the door.

4. Fix from the ticket.

N-able session launched and logged.

5. Verify with the client.

Tested, not assumed.

6. No doc, no close.

The gate does not bend.