ITIL – Sample incident ticket template

1. Executive overview

Describe the purpose, scope and organisation of the document.

2. Incident overview

This document is intended to provide an understanding of the attributes/fields that need to be captured in an incident ticket (a record of information relating to an incident).

It provides guidance via several sections which could be considered as different tabs on a ticket within an IT service management tool.

The following definitions apply for the tables below:

- **Read only**: No data may be entered into the field.
- **System generated**: The application will automatically generate the correct value(s).
- **Check box**: A box, that when clicked will show a mark, indicating that the box has been activated.
- **Linked record**: Means that the field provides a button to allow the user to click on, which will take them to a list of records in the database, at which point they may choose a value to populate the field with.
- **User defined**: Field allows the user to enter any value that they wish.
- **User defined array**: Field is considered a large text box which will allow the user to type multiple lines of text.
- **Drop box**: Field allows the user to click on a drop down list of information, where they are allowed to make one selection to populate the field.
- **Drop box** – nested: The values in this field are dependent on the values listed in the above drop box.
- **Break in format**: Indicates where there will be a visual break in sets of information captured on the incident ticket.

3. Ticket details

This is a common set of information to be gathered for each incident ticket.

Field	Description (where necessary)	Type of field
Ticket ID	This is the number for the ticket. This should be an incremental number. N.B. In high call volume service desks, this number can quickly increase. Some service desks use the following format, which guarantees the number will never exceed a certain length. YYYYMMDDxxxxx, where (xxxxx) is a number that resets every day and increments with each new ticket logged.	Read only. System generated.
Contact name	Self explanatory.	Linked record.
First name	Self explanatory.	Read only. Populated by contact name.
Last name	Self explanatory.	Read only. Populated by contact name.

Field	Description (where necessary)	Type of field
Employee ID	It may be necessary to have a unique ID for each contact on the ticket. An employee id is a common solution.	Read only. Populated by contact name.
Email	Self explanatory.	Read only. Populated by contact name.
Corporate structure/department	This field lists the corporate structure/department that the contact belongs to.	Linked record.
Phone #	Phone number	Read only. Populated by contact name.
Ext #	Extension number	Read only. Populated by contact name.
Fax #	Facsimile number	Read only. Populated by contact name.
Critical user	This check box indicates if the user is of some importance within the company and requires a better level of service.	Check box.
Break in format		
Reported by different from contact	This field is a check box that will display the next section of information. This is common amongst tickets, as in some scenarios the person calling about the incident is not necessarily the individual with the issue. For example, Personal Assistant calling on behalf of the CEO.	Check box.
Reported by	Name of the person reporting the incident.	Linked record.
Phone #	Phone number	Read only. Populated by contact name.
Ext #	Extension number	Read only. Populated by contact name.
Fax #	Facsimile number	Read only. Populated by contact name.
Break in format		
Location	This field should be a linked record and not reliant on the above information. The simple reason is that some employees in your organisation may move around and therefore their usual location may not be applicable.	Linked record.
Room/floor ref.	Self explanatory.	Read only. Populated by location.
Cost centre	Self explanatory.	Read only. Populated by location.

Field	Description (where necessary)	Type of field
Break in format		
Status	The status of the ticket. This will be initially set to open when first logged. Please see *Incident Category Definition Document* for further information.	Drop box.
Owner	Initially populated by the individual (operator) logging the ticket, however, this is a changeable field as tickets may change ownership due to various reasons. The owner of the ticket can only be a service desk representative.	Linked record.
Type	This defines the type of ticket. Values here include: Incident and service request.	Drop box.
Category	Please see *INC8700 Incident Category Definition Document* for further information.	Drop box.
Subcategory	Please see *INC8700 Incident Category Definition Document* for further information.	Drop box – nested.
Product type	Please see *INC8700 Incident Category Definition Document* for further information.	Drop box.
Impact	The impact is the measure of business criticality.	Drop box.
Urgency	Urgency is about the necessary speed to solve the ticket.	Drop box.
Priority	Priority is defined by expected effort in resolving the ticket.	Drop box.
SLA	The associated Service Level Agreement.	Linked record.
Break in format		
Configuration ID	The configuration item number that is involved in the incident.	Linked record.
Type	The type of configuration item. For example: hardware, software, printer, PC etc.	Read only. Populated by configuration ID.
Model	The model of the configuration item. For example: HP laserjet, HP desktop, Dell desktop etc.	Read only. Populated by configuration ID.
Break in format		
Assignment group	The second or third line support group to which the ticket has been assigned.	Linked record.

Field	Description (where necessary)	Type of field
Assignee name	An individual within the assignment group that is working on the ticket.	Linked record.
Phone #	Self explanatory.	Read only. Populated by the assignee name field.

4. Update details

Field	Description (where necessary)	Type of field
Cause code	The likely cause of the incident. This can be changed at the end of the life of the ticket.	Drop box.
Brief description	A brief description of the ticket.	User defined.
Description	A full description of the ticket.	User defined array.
Break in format		
Ticket update	Field to allow the users to type any updates.	User defined array.
Update history	Field that shows all previous entered updates.	Read only.

5. Related Tickets Details

It should be a function of the IT service management tool to allow users to associate other tickets to the incident ticket being worked on.

The association is done by a search and attachment process. This will be determined by the tool itself. When associating another ticket to the incident ticket, the following information will automatically be attached.

Field	Description (where necessary)	Type of field
Incident tickets		
Incident ID	Incident ticket number.	Read only. Auto populated.
Open time	Time the incident ticket was opened.	Read only. Auto populated.
Status	Current status of the ticket.	Read only. Auto populated.
Type	Type of ticket.	Read only. Auto populated.
Category	Category for the ticket.	Read only. Auto populated.
Brief description	A brief description of the ticket.	Read only. Auto populated.
Problem tickets		
Problem ID	See document, *Problem ticket template.*	Read only. Auto populated.
Open time	See document, *Problem ticket template.*	Read only. Auto populated.
Status	See document, *Problem ticket template.*	Read only. Auto populated.
Category	See document, *Problem ticket template.*	Read only. Auto populated.

Field	Description (where necessary)	Type of field
Brief description	See document, *Problem ticket template.*	Read only. Auto populated.
Known error tickets		
Error ID	See document, *Known error ticket template.*	Read only. Auto populated.
Open time	See document, *Known error ticket template.*	Read only. Auto populated.
Status	See document, *Known error ticket template.*	Read only. Auto populated.
Category	See document, *Known error ticket template.*	Read only. Auto populated.
Brief description	See document, *Known error ticket template.*	Read only. Auto populated.
Request for changes		
Change number	See document, *Request for change (RFC) template.*	Read only. Auto populated.
Category	See document, *Request for change (RFC) template.*	Read only. Auto populated.
Phase	See document, *Request for change (RFC) template.*	Read only. Auto populated.
Asset	See document, *Request for change (RFC) template.*	Read only. Auto populated.
Description	See document, *Request for change (RFC) template.*	Read only. Auto populated.
Planned start date	See document, *Request for change (RFC) template.*	Read only. Auto populated.
Planned end date	See document, *Request for change (RFC) template.*	Read only. Auto populated.

6. Resolution details

Field	Description (where necessary)	Type of field
Resolution code	The resolution code for the ticket. This may include values such as: User error, Training, Advice given, No error, etc.	Drop box.
Resolution description	A brief description of the resolution given.	User defined.
Resolution details	A full description of the resolution applied to the ticket.	User defined array.

7. History

Field	Description (where necessary)	Type of field
Opened by	Name of the individual who opened/created/logged the ticket.	Linked record.
Opened at	Time the ticket was opened/created/logged.	Date/time field.
Updated by	Name of the individual who updated the ticket.	Linked record.
Update at	Time the ticket was last updated.	Date/time field.
Resolved by	Name of the individual who placed the ticket into a resolved status.	Linked record.
Resolved at	Time the ticket was resolved.	Date/time field.
Closed by	Name of the individual who closed the ticket.	Linked record.
Closed at	Time the ticket was closed.	Date/time field.