traktip

issuetrak

business rules – escalation rules

You can use Escalation Rules within Issuetrak's Business Rules engine to create management alerts about delays in resolving open issues before a bigger problem arises!

The One That Got Away

Even with your dashboard dynamically tracking and reporting, sometimes issues still fall through the cracks and take too long to resolve. But, with Issuetrak Escalation Rules, you'll know early on if your staff is getting behind—***well before the issues gets elevated above your head.***

Peace of Mind, The Issuetrak Way

To set up your Escalation Rules:

1. Navigate to Administration > Business Rules > Escalation Rules
2. Click "New"
3. Filter by time to identify issues that have been open for too long or haven't been updated recently.
4. Create more filters using other fields, such as Issue Type, Location, Priority, or Substatus.
5. Add a public or private note to the issue, for example, "This issue has been open X days and additional resources might be needed." You can also change the assignment, Substatus, or priority of the issue.
6. Give the rule a name and set the process order, which is the order the rules fire off against open issues.

Now that you've set up Issuetrak to identify issues in need of your immediate attention, let's edit the escalation rule to send notifications when the conditions have been met.

1. Click "Edit" on the Escalation Rule you just created.
2. Navigate to the bottom of the page and click "View/Maintain Distribution List" for email notifications.
3. Now add individual users and/or groups to the notification list for when this escalation rule runs.
4. Edit the individual names on the distribution list and check whether they need just an email or an SMS alert.

Now you'll receive an email or SMS message when open issues reach critical points where additional resources are needed to resolve the issue quickly and efficiently.

Efficient Resolution, Each and Every Time

With Issuetrak Business Rules, you can rest assured that your business processes and procedures are followed consistently. Setting the above alert provides an additional safeguard for helping your team stay on track of all your open issues.

If you have questions or would like to see this in action via a quick demo, don't hesitate to contact your Sales Engineer. We're happy to help!