Data Import Ticket Process

07/24/2024 1:40 pm EDT

All data imports start in Zendesk through a ticket. Through this new workflow, our team has better tracking and transparency with the data import process.

1. Once you have logged in to Zendesk, click **+Add** to start a new ticket.

2. Enter your name as the requester.

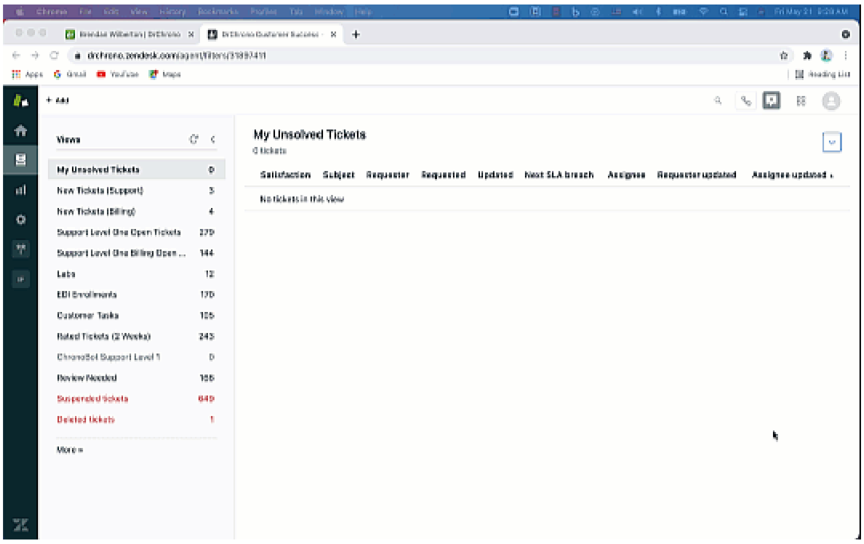
3. Select the **Apply Macro** menu and select the **Data Import Requests** option.

4. Apply the relevant macro for the data import.

5. Fill out all of the information requested on the ticket.

6. Add any parties that need to be copied on the ticket.

7. Click **Submit**.



8. The created Zendesk ticket is automatically assigned to a PS Engineer for review. (Review period is 1-2 days)

9. Post review: if the ticket does not require any additional information or clarification; the PS Engineer will accept the ticket and create a **linked JIRA ticket** to begin & track dev work on the submitted data/files following SLAs based on project type (Please check the slack channel #data_imports for updated SLAs).

10. After dev work is completed, the ticket requester will be notified in ZenDesk (via tag) to issue a Consent Form to the customer point-of-contact. This notification will contain a table-based summary of all data located by the engineers (Data Import Consent forms are available here: https://drive.google.com/drive/folders/0B0phpysSvxyCUHI5dEI0VmpjNXM?usp=sharing)

11. Once the signed consent form is returned and reviewed, the requester will be notified when the import of provided data has been scheduled and when it has been completed.

12. Upon completion of the project, the Zendesk ticket will be re-assigned to the requester for a final review. A summary of tasks is provided, along with any spreadsheets or files that were not imported (if applicable) via

DrChrono Box Storage.