



## **Texas Users Meeting**

*March 4, 2014 at 10:30am Eastern*

*Presenter: Chris Benefield*

The meeting began at 10:30am Eastern.

The following topics were discussed, as well as a PowerPoint was presented:

- What is NJUNS? Non-profit, owned and ran by our membership states with a board of directors and executive counsel
- NJUNS Texas Sponsors: AEP, AT&T, Oncor, TNMP, & Verizon
- Texas Directors: Sherri Kinsey – Oncor & Nancy Jackson - TNMP
- Texas History: Joined NJUNS in 2003
  - First tickets created in 2003
  - Reboot in 2010/2011 – Oncor & TNMP
- 2013 Yearly Numbers for the state of Texas:
  - 6,676 created tickets
  - 8,120 tickets with steps completed
  - 1,920 tickets closed
- Prior to 2013:
  - 6,400 tickets created
  - 1,400 tickets closed
- Demonstration Portion:
  - Send Message Function:
    - Send Message is a tool that allows users to send a message to parties on a ticket in the form of an email.
    - Checking the checkboxes will indicate who the message is sending to. You can either check the boxes or type in an individual email.
      - There is a high probability of mistyping the email address causing a failure if you decide to type the email address in yourself.
      - Selecting a checkbox AND inputting an email address will send the message twice.
  - Closing/Updating Tickets:
    - Updates – Demonstrated the process of how user updates steps from changing Pending to Complete and Saving the step. This was demonstrated several times to the attendees. A user can update and notify others on an update in around 10 seconds.



- Close – Demonstrated the process of how user closes a ticket by changing the ticket status from Open to Close after all steps are complete. This was demonstrated several times to the attendees. The more steps being completed the most tickets that need to be closed.
  - Re-Open – Demonstrated the process of how users can re-open a ticket after it has been closed by changing the status from closed to open. The instance reason will state that the ticket has been re-opened.
  - Auto Close – Demonstrated how pole owner member codes can turn on the auto close feature. This feature allows tickets to auto close after the last step is completed. If a Pole Owner would like this turned on, please contact staff.
- User Forum/Website:
    - Training Videos: Updated interactive training videos
      - Gives users a visual way of learning the system and is readily available at all times.
    - Users Guides
      - Gives users a different way to learn the system and is readily available at all times.
    - Texas Forum: State Priority codes and Board of Director/Sponsor information
      - Meeting minutes for today's meeting will be placed in the Texas User Forum.
      - Utilize State Forums for open topics within the state
  - Utilization of Social Media: Suggested that users Like us on Facebook & Follow us on Twitter
  - Reports:
    - PT+ Detail Report:
      - This report lets you input many different parameters and it returns all ticket information. This report is like a data dump.
      - Data is in a normalized format so it is flexible to users. Users can apply auto-filters, pivot tables, graphs and more to make the data fit their needs.
      - This report offers most parameters to input information and returns the most information.
    - PT Close Report:
      - This report lets you input your member code and it shows all tickets that are ready to be closed. All steps on the ticket are completed and the ticket is ready to be changed from open to close.
      - Close Report shows statistics of count by pole owner member code.
    - PT+ Next To Go Reports:
      - PT+ Next To Go – Pole Owner:
        - Shows Next To Go tickets as the pole owner
        - Shows statistics of member code and job type. User can change statistics by utilizing the pivot table.



- PT+ Next To Go – Step Member:
  - Shows Next To Go tickets for a member code
  - Shows statistics of member code and job type. User can change statistics by utilizing the pivot table.
  
- Questions/Feedback:
  1. Can emails be tracked?
    - a. Yes, we keep a history of emails through the notification messages function. You can look up your own email address or contact staff about an email sent to another party.
  2. What are Ad Hoc Queries?
    - a. These are for staff use only.
  3. Are adding comments/send message function similar?
    - a. Comments are actually on a ticket and are included in email notifications, whereas send message was designed for being used like an email.
  4. What do you do if you cannot complete your step because it has the wrong member code or you are not Next To Go?
    - a. Add a dispute to your step stating that you are not NTG
    - b. Step members have the ability to change the member code to the Pole Owners code. Add remarks telling why you changed the step
      - i. Note that if you change the code you are no longer on the ticket and cannot view the ticket
    - c. Add a comment to the ticket
  5. Do I have to hold down CTRL to run a report?
    - a. No, you only have to hold down CTRL if your computer is blocking the file from opening. Holding down CTRL overrides the block and you can change this in your settings.
  6. Can you see the ages off of the PT+ Detail Report?
    - a. The PT+ detail report shows the next to go start date and response request dates. You can add a column and use a simple formula to calculate the days aged.
  7. Is there a list of all active member codes?
    - a. A list of all member codes can be found at [www.njuns.com](http://www.njuns.com) by clicking on the members tab and selecting your state.
  8. Who is responsible for closing tickets?
    - a. The pole owner and creator have the capability of closing a ticket. A step member cannot close tickets.
  9. How do you setup auto-close?
    - a. Send an email to NJUNS staff stating your member code and that you want to set it to auto-close. This function is only available to pole owners.
  10. Can you use wildcard characters in your search?
    - a. Wildcards can be utilized in the quick search. Using \*\* will pull up all results for you that include the text before or after the wildcard. For example, searching alpha\*\* will pull up anything that begins with alpha.
  11. How do I know when my step is completed? Is there a way to be notified if someone besides you completes the step?
    - a. An email is sent out when the step is completed. If you do not receive the email then request to be added to receive email notifications for your member codes.



12. Are their plans to add other pole owners to the system?
- a. Fairpoint is looking into the system. Sherri Kinsey stated that if you deal with a company who is interested in the system to send them to the BOD in the state. Also, any pole owners that users work with can mention NJUNS and see if they are interested in joining. We offer demos and training to new utilities and users.

The next Texas State Users Meeting will be held in late August/early September 2014. Any email will be sent out prior for registration.

The meeting ended at approximately 11:40am Eastern

**Attendees:**

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