May 2016

# Ticketer

# User Guide

## Document History

Original Author: Michelle McCausland

Errigal, Inc.

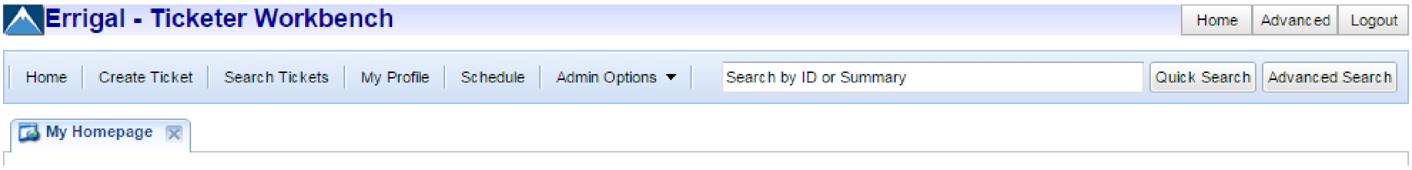
Email: michelle.mccausland@errigal.com

| Document Version | Date | Description of Changes | Changes Made By |
|---|---|---|---|
| 1 | 1/20/15 | Document Created | Michelle McCausland |
| 2 | 11/2/15 | Form Visibility | John Rellis |
| 3 | 11/04/15 | Responsibility Migration | Eoin Joy |
| 4 | 11/19/15 | Readability Editing | Eoin Joy |
| 5 | 01/08/16 | Responsibility Migration Updates | Eoin Joy |
| 6 | 02/22/16 | Updating with ticketer role permissions | Michelle McCausland |
| 7 | 03/15/16 | Updating with advanced workflow and form features in 2.15.0 | Anna Dowling & John Rellis |
| 8 (3.1) | 04/04/16 | Updated with Role information | Sophie Renshaw |
| 8 (3.2) | 05/19/16 | Updates to workflow section | Cathal O'Keeffe |

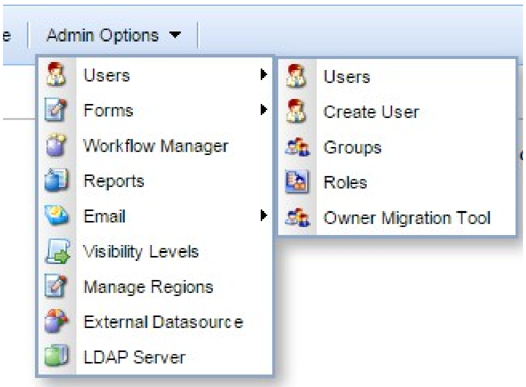
# Contents

# Add and Manage Users

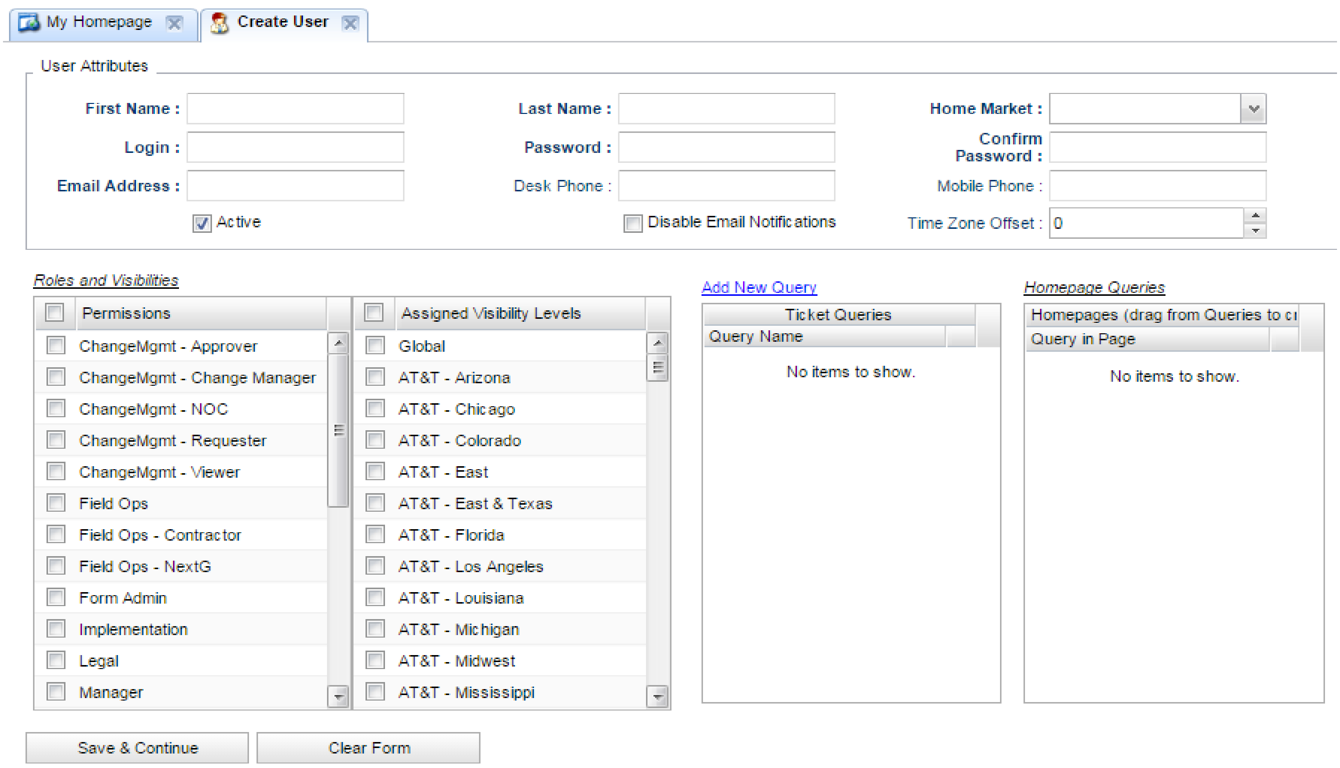
When you log in to the ticketer you will be presented with the following screen in addition to your homepage which will be based on your homepage preferences that you can setup.




To add a new user click **Admin Options > Users > Create User**.




You will then be presented with the create user form where you fill in the data accordingly.



## User Permissions

Current list of ticketer user permissions and their description:

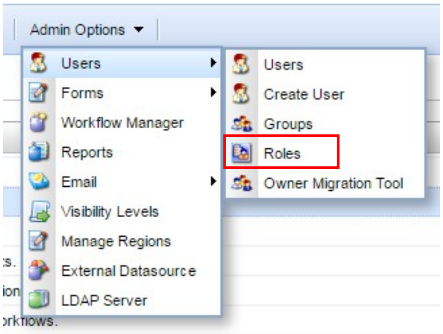
| Name | Description |
|---|---|
| ChangeMgmt – Approver | Responsible for Approving Change Requests and Closing Change Requests that have been Implemented and Verified. |
| ChangeMgmt – Change Manager | Change Management Super User. View all, Create, Update, Approve, Cancel, Close |
| ChangeMgmt – NOC | Responsible for updating a Change Request after the Implementation is complete and the ability to view all Change Requests. |
| ChangeMgmt – Requestor | Create a Change Request, update/edit an existing Change Request that was created by the Submitter. |
| ChangeMgmt – Viewer | Read only access to all Change Requests. |
| Field Ops * | Identify as a Field Operations user. |
| Field Ops – Contractor * | Field Operations - Outside Contractor. |
| Field Ops – NextG * | Field Operations - NextG internal. |
| Form Admin | Allows user to create, modify, and delete forms. |
| Implementation * | Identify as an Implementation user. |
| Legal * | NextG Legal Dept. |
| Manager * | Manager |
| Mobile User | Can view and edit mobile tickets |
| Mobile Viewer | Can view but not edit mobile tickets |
| NOC * | Network Operations Center. |
| NOM * | Network Operations Manager |
| PM Carrier Viewer | Can view but not edit PM tickets |
| PM User | Can view and edit PM tickets |
| PM Viewer | Can view but not edit PM tickets |
| Project Manager * | DAS PM. |
| Report Admin | Allows user to create, modify, and delete reports. (Legacy feature) |
| RF Engineering * | Identify as an RF Engineering user. |
| SCN NOC Tech * | Role to identify the users in the SCN NOC. |
| Sysadmin | System administrator role. |
| Technician * | Technician. |
| Ticket Creator | Allows user access to create and view tickets. |
| Ticketer Admin | Gives user access to Ticketer Admin functions. |
| Workflow Admin | Allows user to create, modify, and delete workflows. |

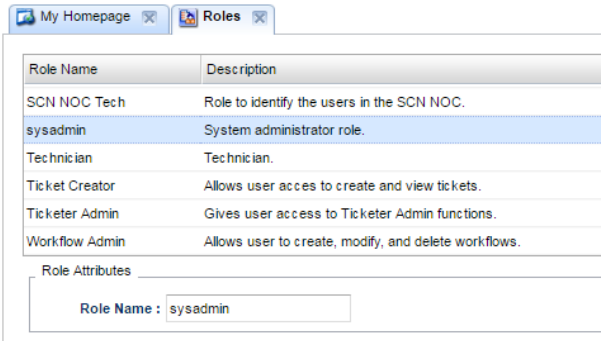
Any of the Roles in the table marked with an asterisk (*) are labels that are primarily used for identification of users as well as in Reporting. All other Roles are essential for how certain parts of the application works. If a user does not have one of these roles assigned they will not be able to perform specific tasks.

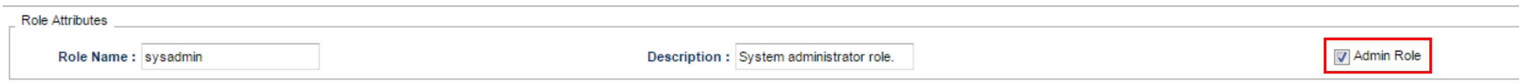
Note: Due to functionality that has been introduced in 2.15, roles that were previously classed as labels, as well as functional roles will now have much more of a purpose. See sections titled **Editable and Hidden Forms, Editable Form Fields, Advanced Workflow Settings** for further information on how roles will be utilized.

## Admin Roles

A number of roles are also classed as Admin Roles. Having the Admin attribute will allow the user with the role to access the Admin page of the Ticketer application. The roles that are Admin Roles are sysadmin and Ticketer Admin. To give a role the Admin attribute select **Admin Options > Users > Roles**. Select the Role from the list of roles and check the “Admin Role” checkbox. Click the “Save Changes” button at the bottom of the page.




## User Attributes

First Name, Last Name, Login, Password, Confirm Password, Email address, Desk phone, Mobile phone.

**Active -** this box is checked if the users account is actively being used as user accounts are not deleted just made redundant due to their association with tickets.

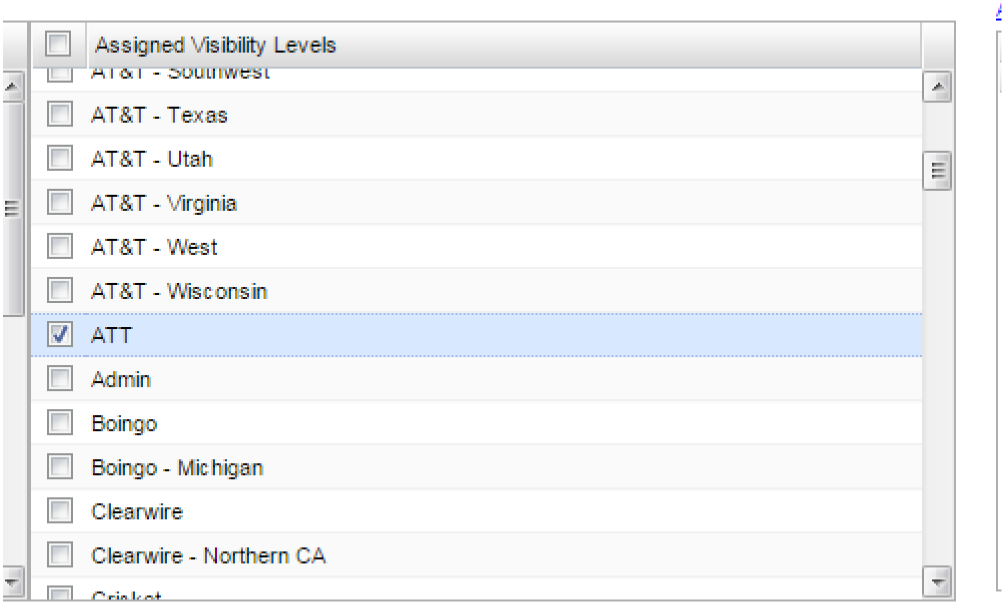
**Disable Email Notifications** - if checked this will disable email notifications for this user. **Please note:** this does not remove an email address from a ticket notification that is handled by contact responsibilities in the node monitor.

**Time Zone Offset** - Relating to time before or after GMT.

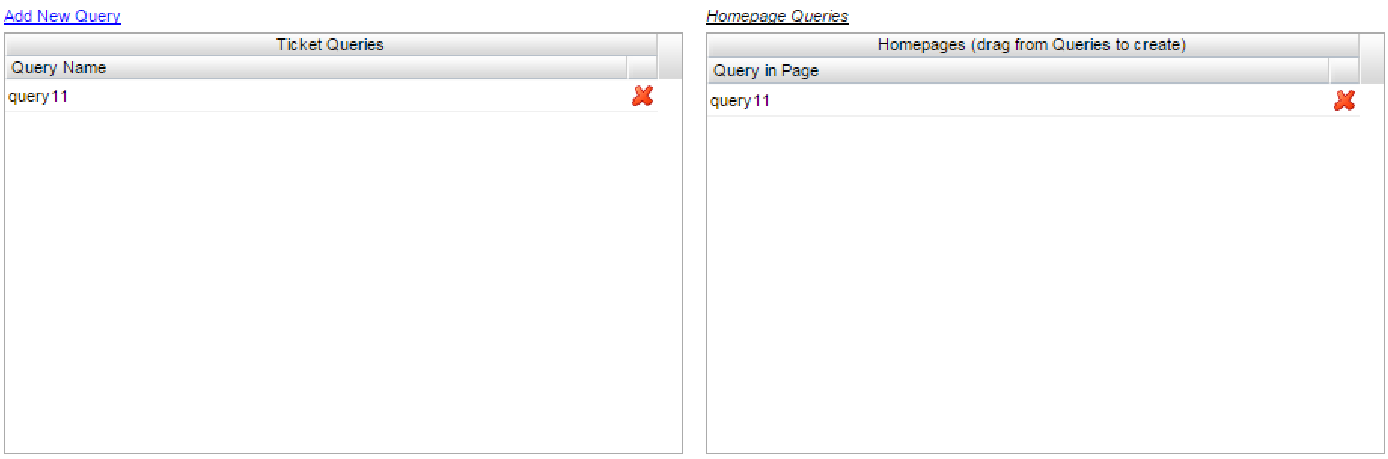
**Roles and Visibilities**

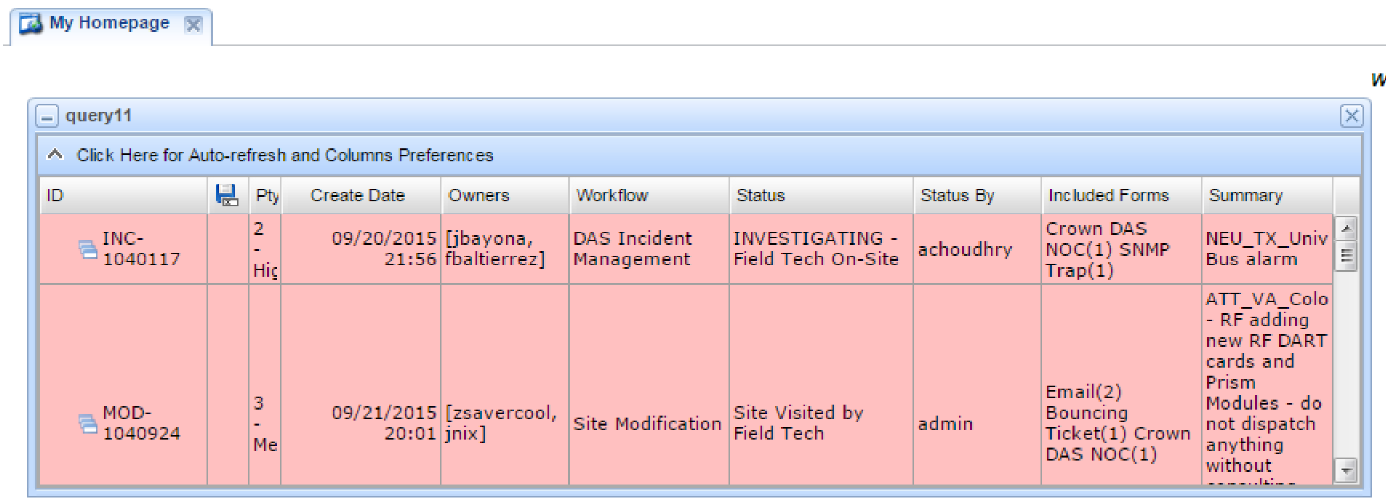
The **Permissions** column allows you to set the permissions you require for a particular user. **Please Note:** User editable roles include: user viewer, pm, mobile, admin, ticket creator.

**Assigned Visibility Levels** - associates selected areas with this user based on their visibility requirements. You can assign a user all hubs under a carrier by selecting the carrier visibility level at the end of the hub list.




**Add New Query** & **Homepage Queries** - Allows you to enter customised search parameters and save them for later use. After creating a new query click and drag the saved query to the homepage section in order to make them visible on the homepage.




To save and create this user click **Save & Continue** button or to clear the form click the **Clear Form** button.

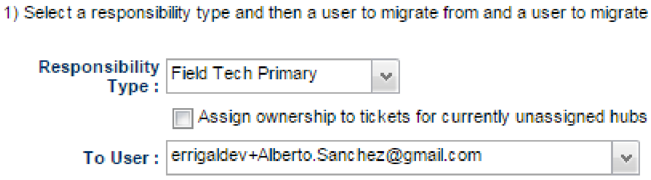
To see the list of existing users click **Admin Options > Users > Users**

From there you will be brought to the list of users where you can see user details, depending on your roles.

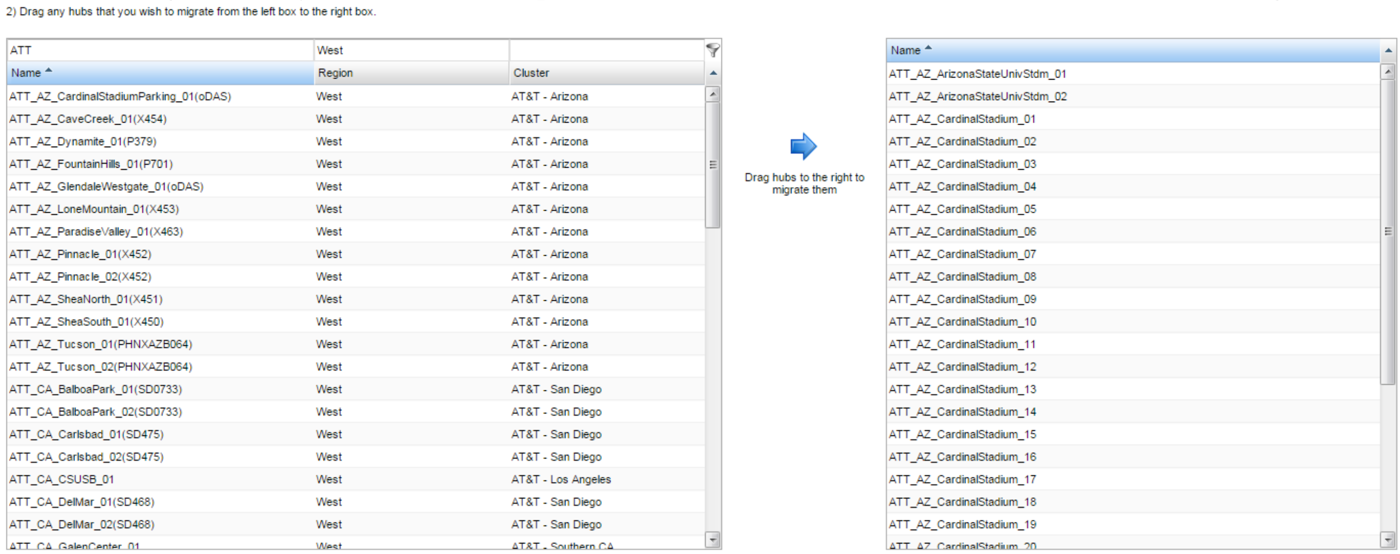
In order to edit a current user, double click on their row in the table to bring up their information. You can then edit the information accordingly. Once completed click the **Save & Continue** button to save the changes.

## Migrating User Responsibilities

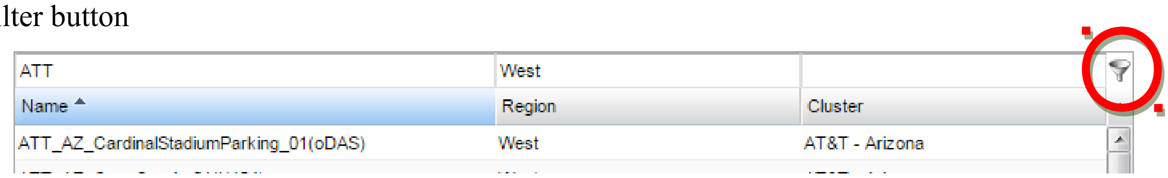
It is possible to add the responsibilities to users for current and future tickets assigned to a hub from **Admin Options > Users > Owner Migration Tool**.
Select the **Responsibility Type** from the dropdown. (e.g. Field Tech Primary)
Select the user to whom the responsibilities will be added to with **To User**. (e.g. Alberto Sanchez)
The checkbox “Assign ownership to tickets for currently unassigned hubs” allows you to assign ownership of tickets to the user, where relevant, if there are no other users on that hub with that responsibility.



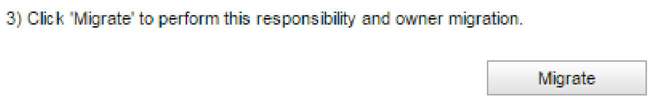

Click and drag the hubs you wish to add responsibilities for from the box on the left to the box on the right.




You can filter the hubs by name, region, and cluster using the text fields above each column and then pressing the filter button




Finally, press **Migrate**

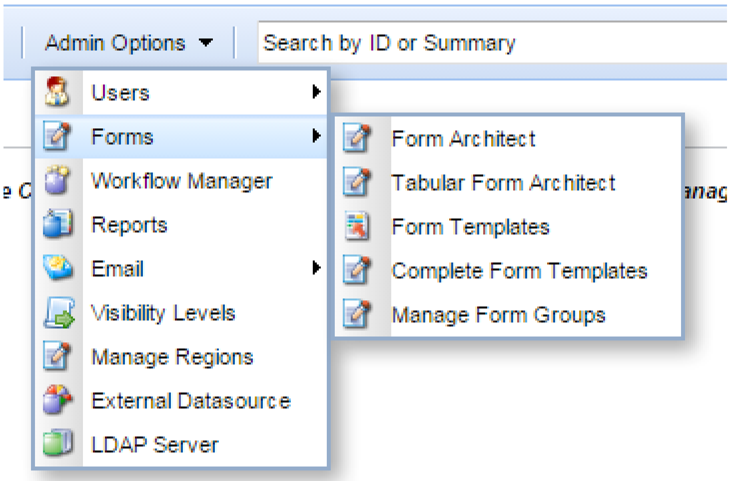



**IMPORTANT:**
When you press **Migrate**, a dialog will warn you that any previous responsibilities for that user on that hub will be replaced, and that **this cannot be undone**.
This means, for example, that if a user was previously a Field Tech Secondary on some of the migrated hubs, and is changed to Field Tech Primary, their previous responsibility as Field Tech Secondary will be replaced with that of Field Tech Primary. The previous configuration will not be recoverable by the system.

You will be notified of how many tickets changed ownership due to this migration.

## Forms

Each ticket created can have many forms added to it. Forms are added to tickets to add extra pieces of information to them. There is already a pre-made selection of forms to choose from, however it is possible to create your own forms depending on their purpose.
To access forms go to **Admin Options > Forms > Form Architect**



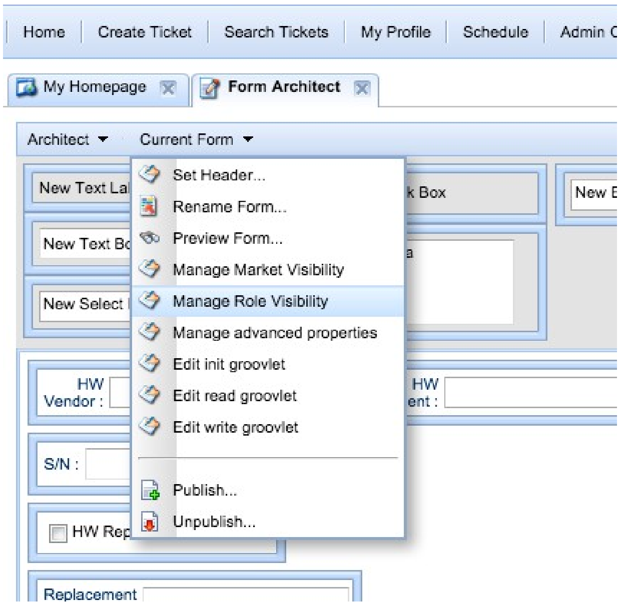

From there you can begin to work on your form. If you want to open an existing form, click **Architect > Open Form** then select the form you wish to open.

You can edit/ manipulate your form dynamically by clicking and dragging the form elements accordingly. To edit the contents of the form element simply double click on it to bring up the context menu. Depending on the form element you will see its form properties with different fields for you to fill in.

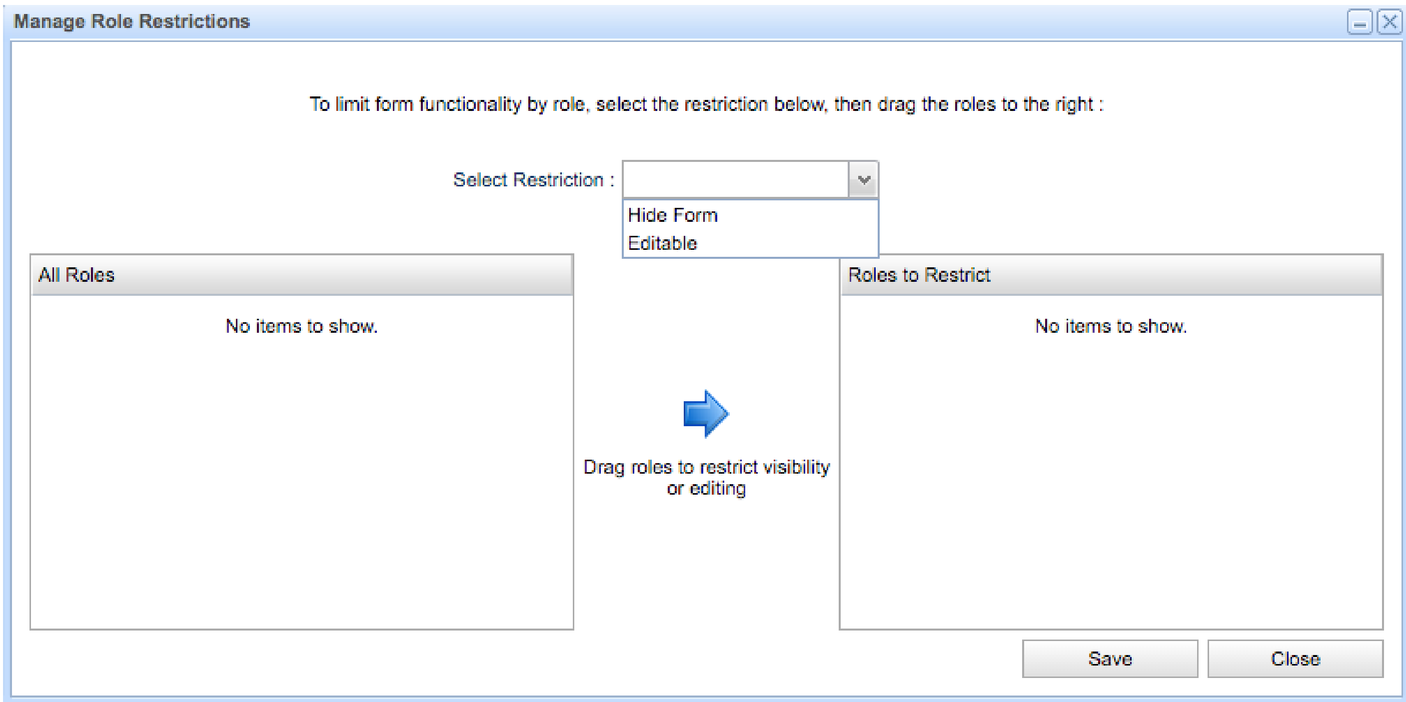
Once you have completed editing the form click **Publish** in order to publish the changes.

## Editable and Hidden Forms

Forms can be marked editable or hidden to users that are assigned to a certain role.  To do this, open a form in the Form Architect and select **Current Form > Open Form -> Manage Role Visibility.**



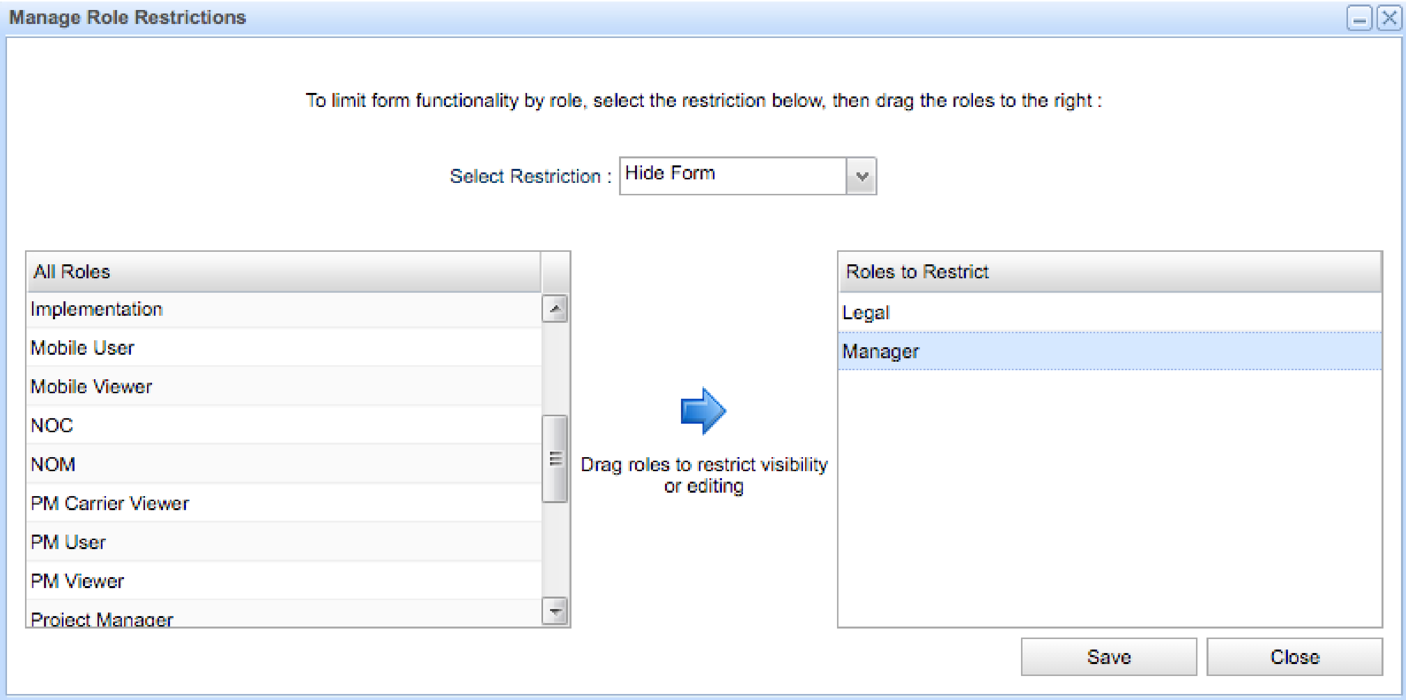

To begin, select a restriction type, either “Editable” or “Hide Form”.




“Hide Form” will hide the form all selection lists for the selected roles and also prevent it from displaying for any user with any of the selected roles.

“Editable” will make it impossible for any a user with any of the selected roles to edit the form.  If no roles are added to the “Editable” restriction, the form is editable by everyone.

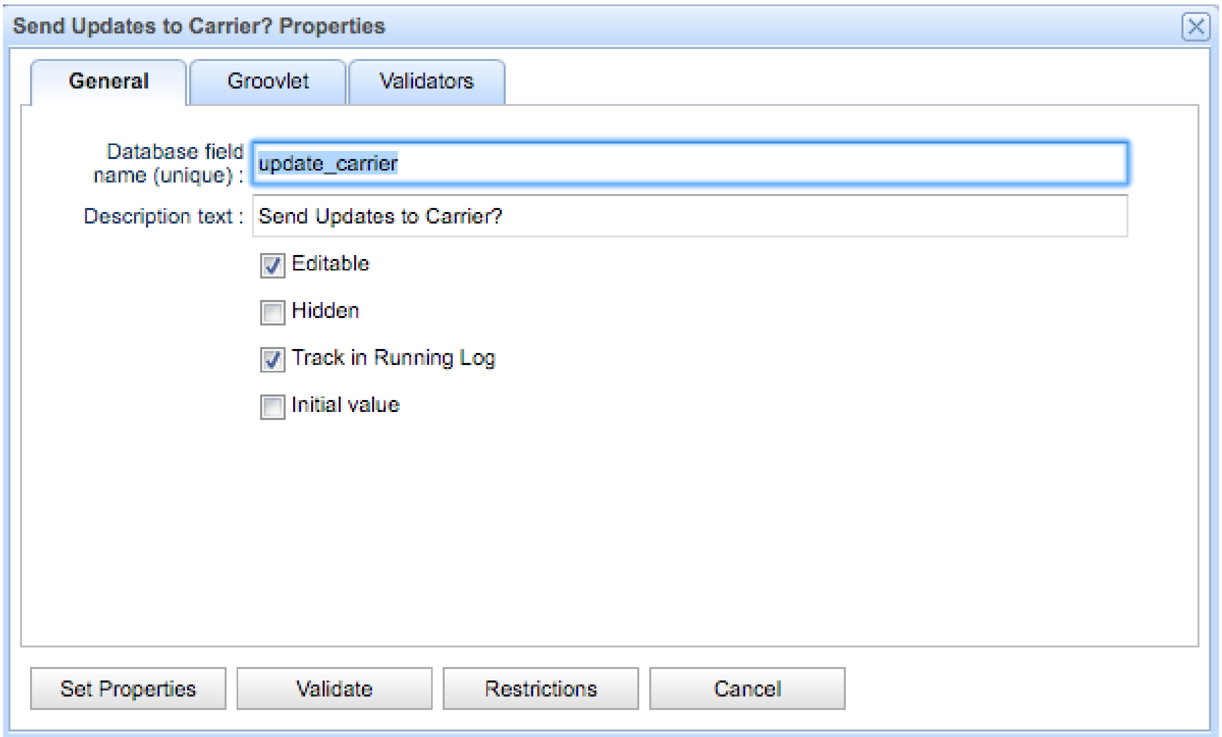
To add the selected restriction to a role, simply drag the roles to the list on the right and click the “Save” button.




Note that the Ticketer Workbench will need to be refreshed for users to notice any changes.

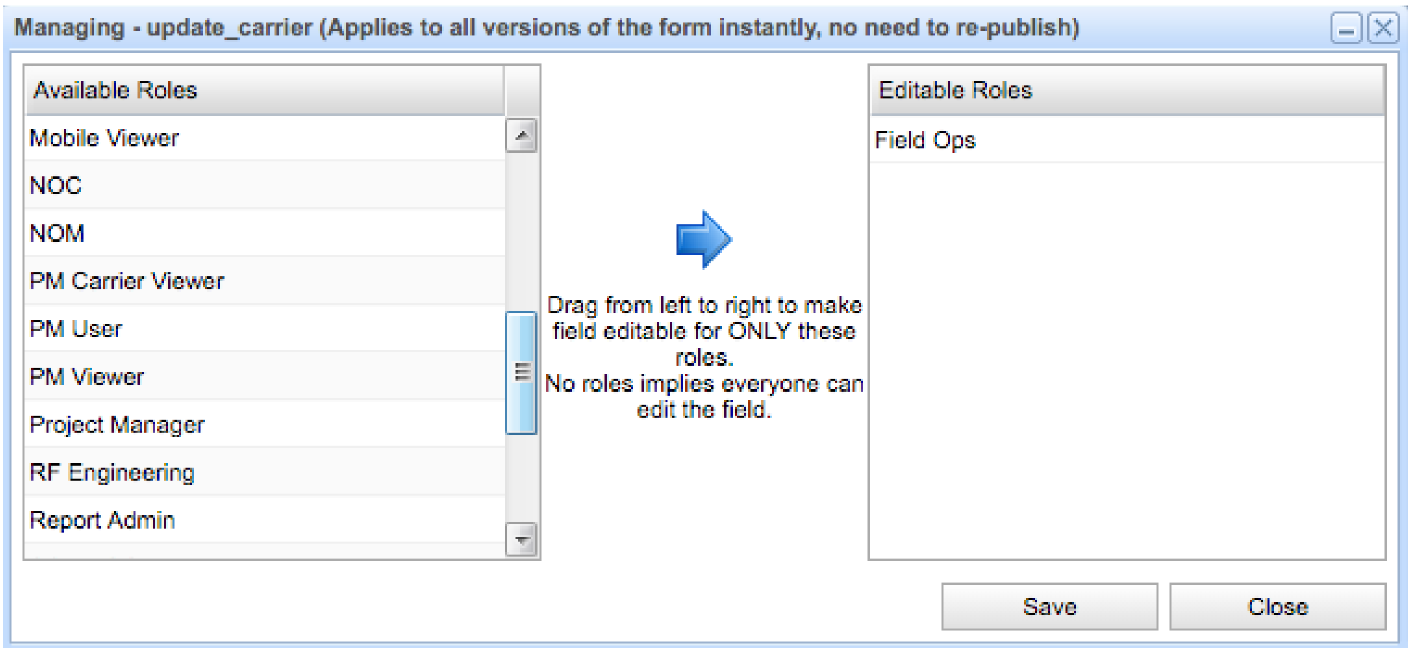
# Editable Form Fields

Form Fields can also be marked as "editable" to users with specific roles. To do this, open a form in the Form Architect and double click the component you want to restrict, the following popup will be displayed.



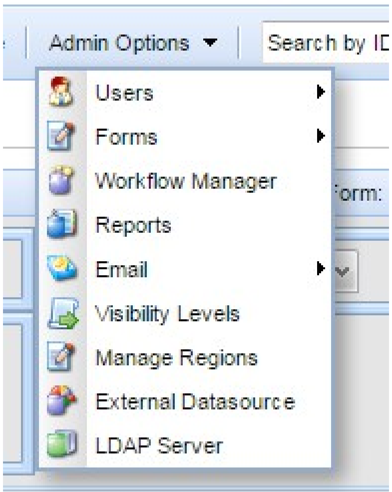

Next, click the **Restrictions** button and drag any roles you would like the form field to be editable for into the "Editable Roles" list and click the **Save** button.

Note that if the "Editable Roles" list is empty; all users can edit that field. The Ticketer Workbench must be refreshed for these changes to be reflected.

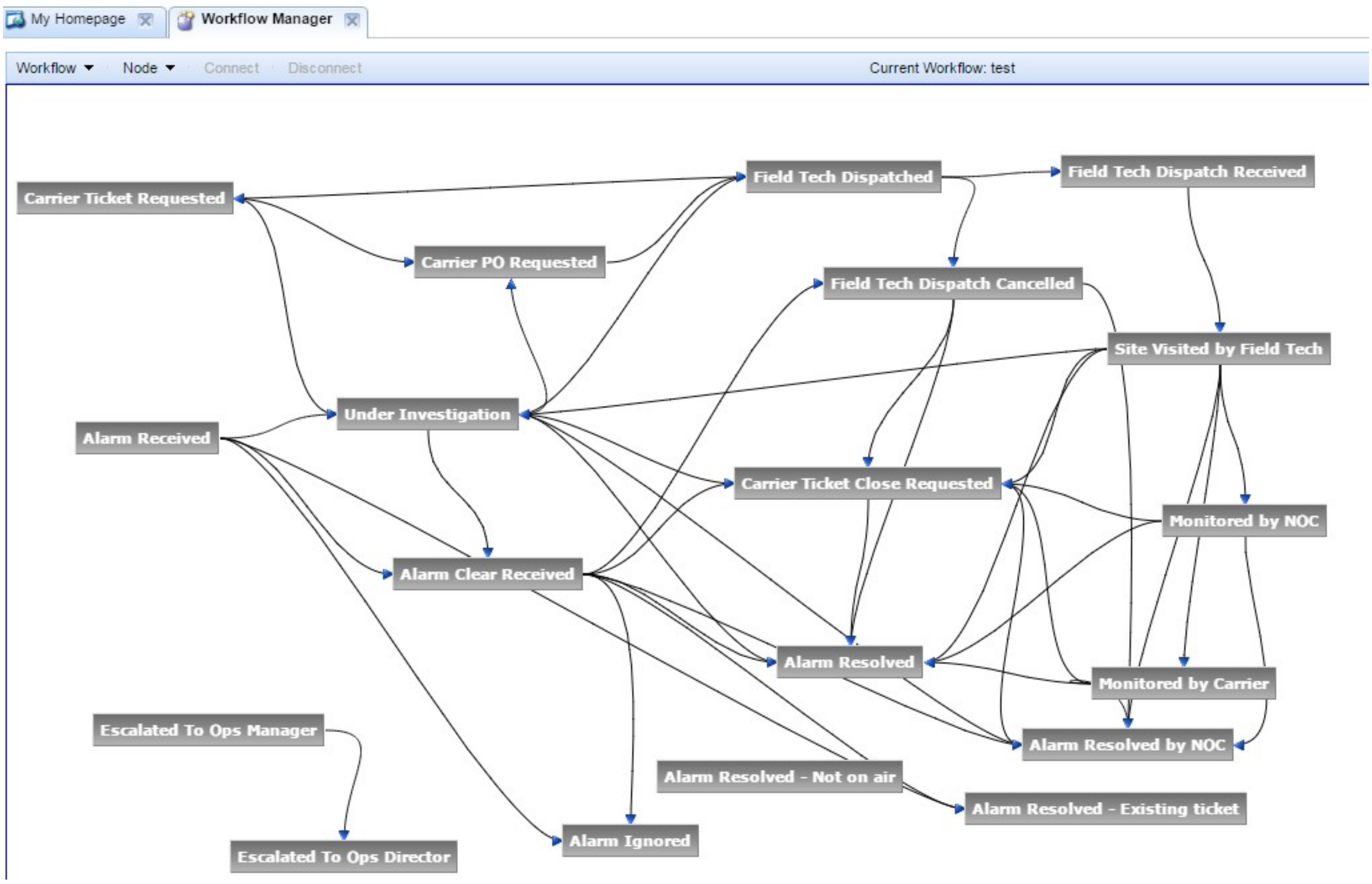


# Workflows

Workflows describe the steps involved in order to resolve a ticket. They are automatically assigned to newly created tickets and are structured differently depending on the ticket.
Workflows can be accessed from tickets or by clicking **Admin Options > Workflow Manager**



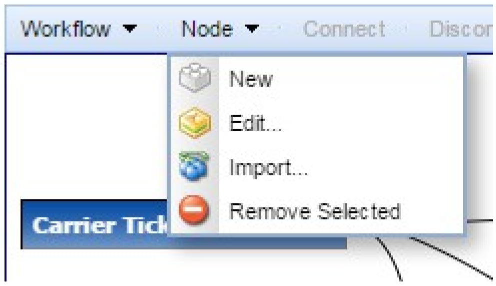

Once in the Workflow Manager you can manually create a new workflow by clicking **Workflow > New** then giving the workflow a name, or open an existing one by clicking **Workflow > Open** and selecting the workflow.



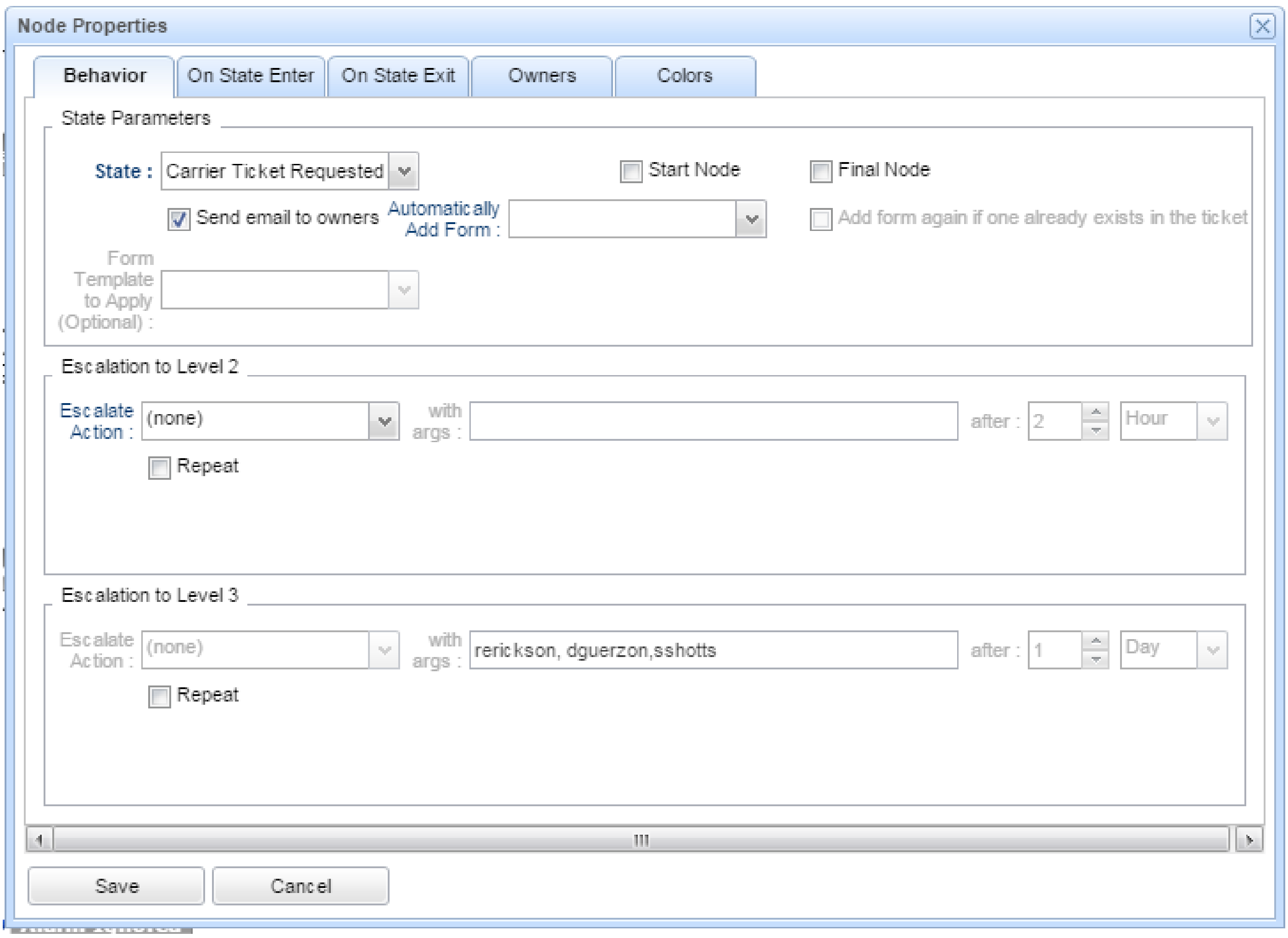

Once you are in a particular workflow you can move workflow nodes around by clicking and dragging.

To connect or disconnect two nodes click on the nodes you wish to connect and click **Connect/ Disconnect** depending on your preference.

If you wish to add a new node, click **Node > New**, name your new workflow node and click **OK**.

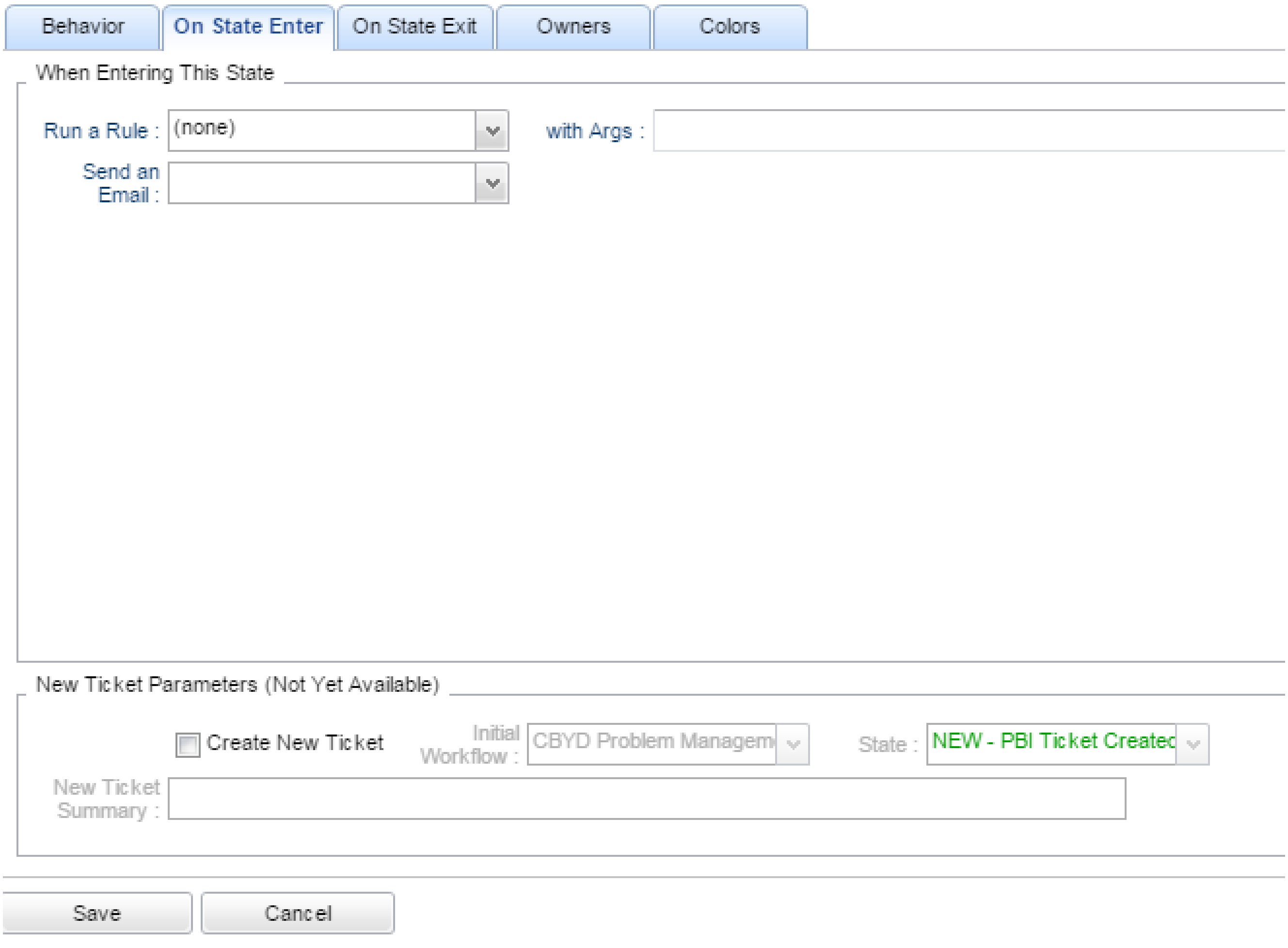



To edit an existing node, simply double click on it to open its context menu. From here you are given a number of options to fill in/edit relating to the node.

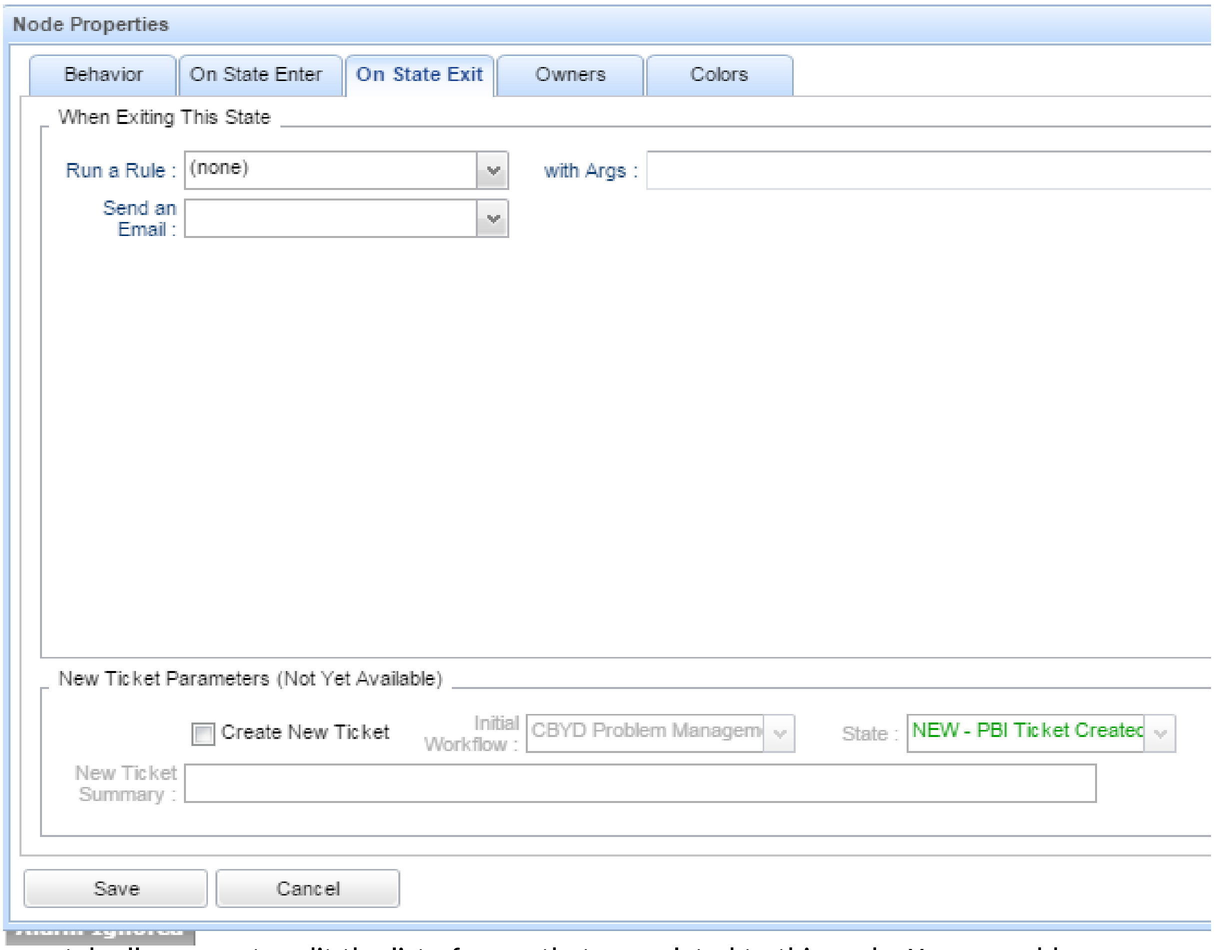



For example, you can add certain **Behaviour** to a node to make it carry out an action when it becomes active, or when it moves onto the next node. You can add general behaviour to it so that it sends an email notification to owners associated for example, or to automatically add a form.

The **On State Enter** tab refers to behaviour incurred when the node becomes activated.



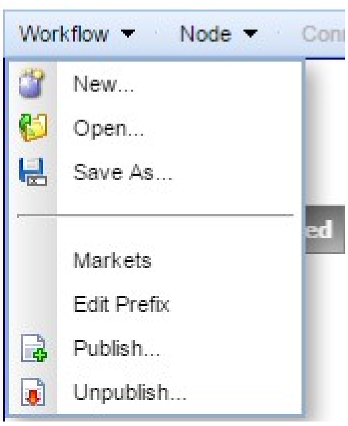

The **On State Exit** tab refers to behaviour incurred when the node is left and the next node is moved on to.




The **Owners** tab allows you to edit the list of users that are related to this node. You can add or remove users by clicking the left or right arrow buttons depending on your preference.

The **Colors** tab allows you to change the colors of the node itself and the node's text.

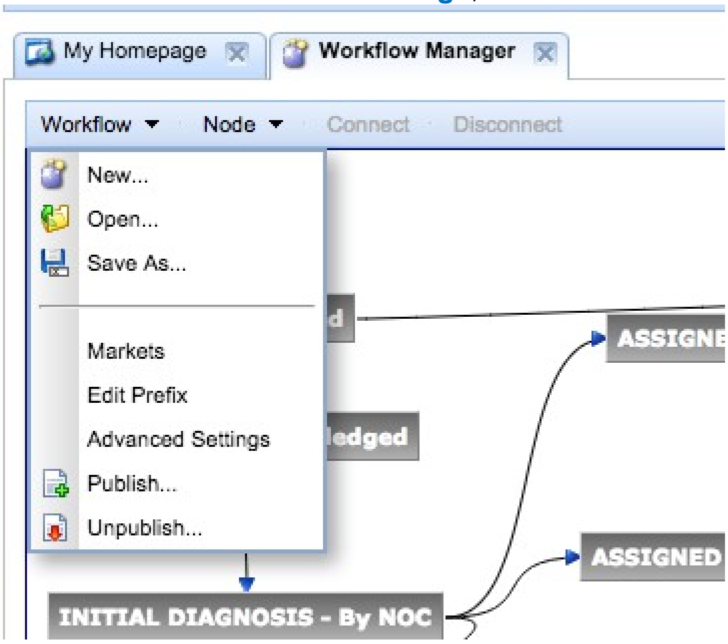

Once you have completed editing your workflow click **Workflow > Publish** in order to publish the changes to the tools.



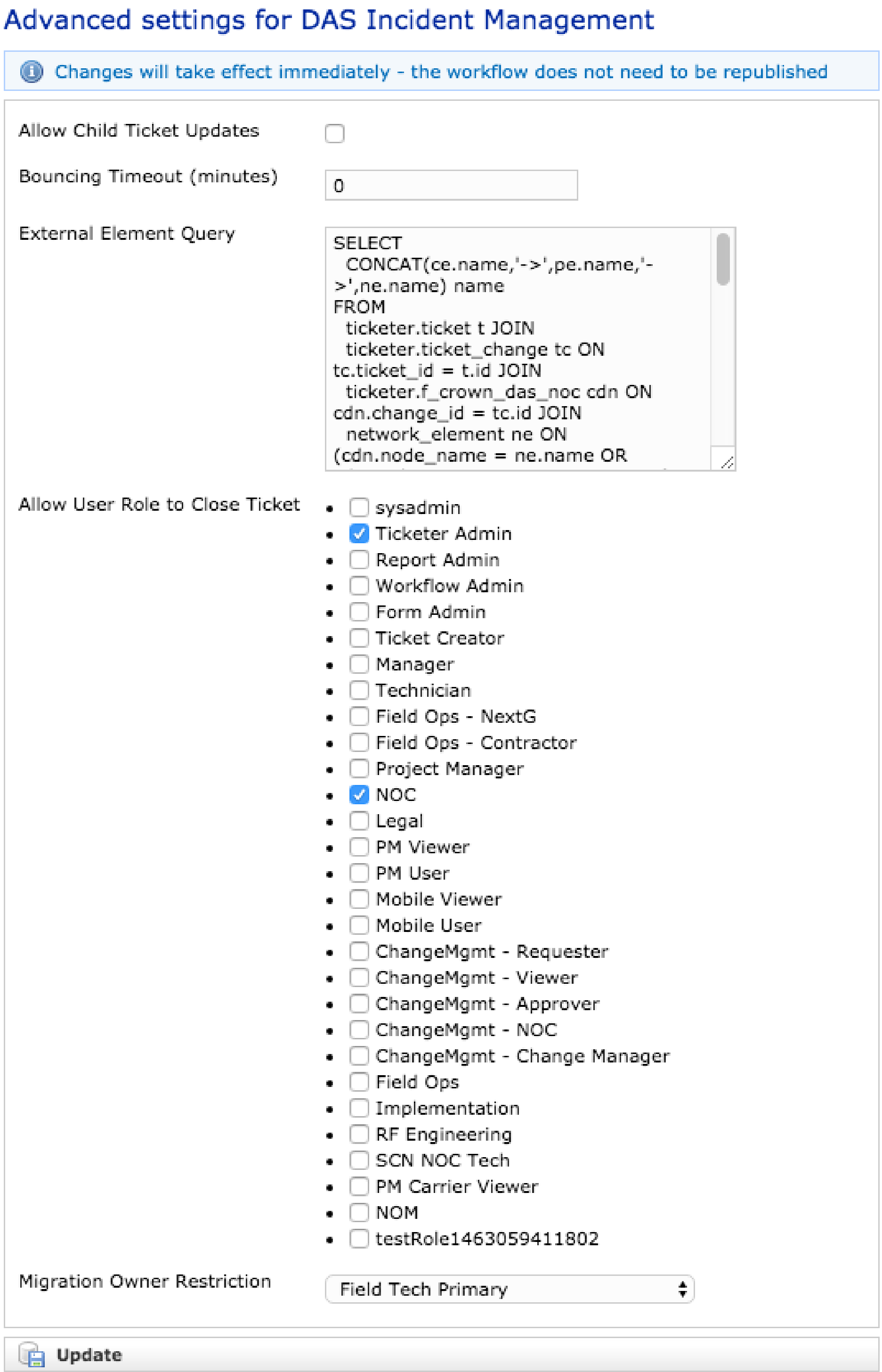
# Advanced Workflow Settings

Advanced workflow settings are only available for configuration to admin users. They can be accessed by logging in as a user with the Ticketer Admin role and navigating to admin/workflow manager.

To edit the advanced settings for a particular workflow, select the workflow from the dropdown.
Go to **workflow/advanced settings**, demonstrated below:




You should be brought to the following screen with advanced workflow configuration settings:




Check the roles which you want to be able to close a ticket in the selected workflow. In this example only Ticketer Admin and NOC users have been given these permissions.

Click **update** to apply the settings to the workflow.

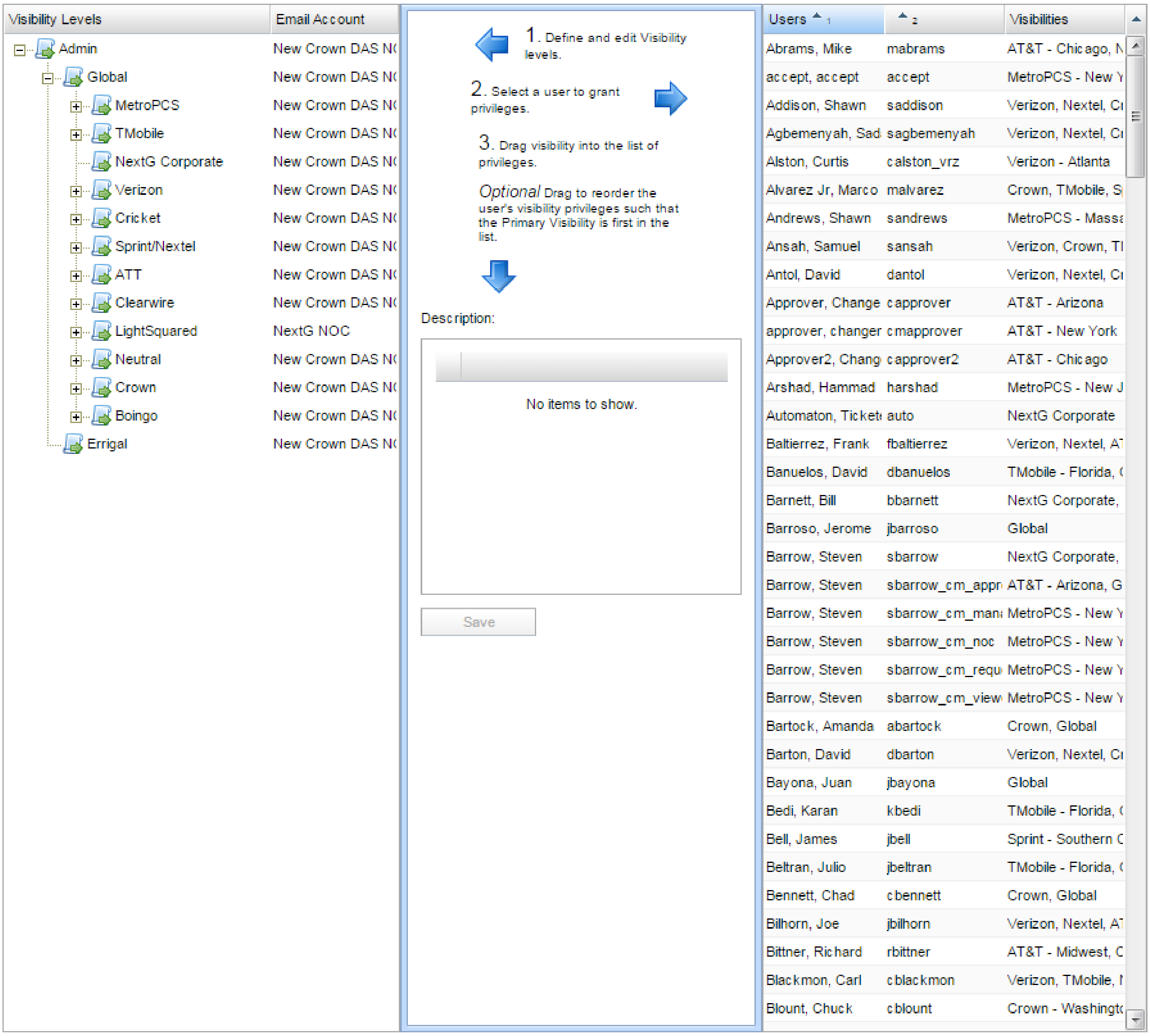
As a user with the appropriate roles i.e. NOC or Ticketer Admin, try to move a ticket to a closed state in the workflow which the changes were applied to. You should be able to close this ticket without issue.

As a user who does not have the appropriate roles to close a ticket, try to move a ticket to a closed state in the workflow which the changes were applied to. You should be presented with an error which prevents you from closing the ticket.

This page also has an option for applying a Migration Owner Restriction setting. This restricts what users will be assigned as owners to tickets in this workflow when assigned to network elements using the Owner Migration Tool. In this example users assigned to hubs as Field Tech Primary will become owners of tickets for that hub while users that are assigned to other roles (such as Field Tech Secondary) will not.

## Managing Clusters in the Application

Clusters can be managed under the visibility section. Go to Admin Options > Visibility Levels. From there click the plus icon next to the Admin visibility level, then Global to go down to the carrier level. Clicking into each carrier will drop you down to the node level.




To **add** a visibility level, right click on the carrier or node you require and select **Add Visibility Level.**

To **edit** a visibility level, right click on the carrier/node you require and select **Edit Visibility Level.**

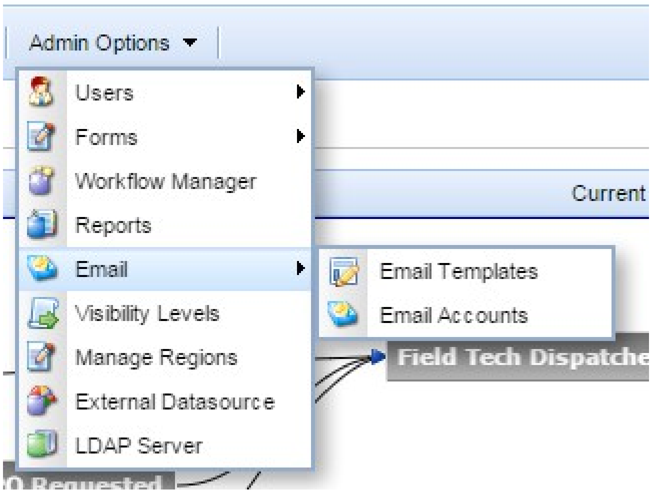
To **delete** a visibility level, right click on the carrier/node and select **Delete Level.**

**Note:** To manage a user's market visibilities, you should be using the **Admin Options > Add/Manage Users** interface

**Please Note:** Clusters must be synced in the node monitor to be visible to the tools. So it is important that when you are finished making the changes in the node monitor to click the **Add Cluster to DB** button.

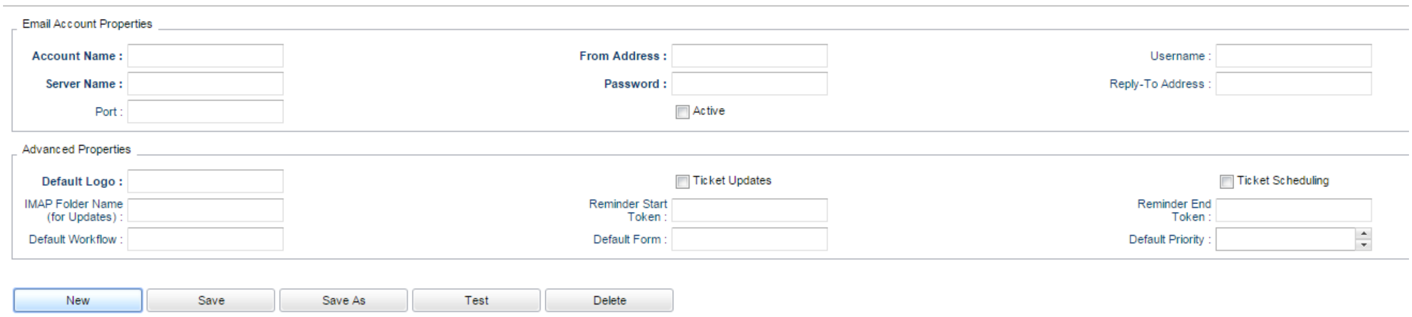
## Email Accounts

To manage the email accounts the Ticketer Workbench will use, click Admin Options > Email > Email Accounts




From here you can see a list of email accounts already created and their associated information.

To create a new email account, click the **New** button at the bottom of the page. You will then be presented with the following screen where you can enter the information accordingly:




### Email Account Properties

**Account Name** - name of the account

**Server Name** - name of the server

**Port -** the port number used by the server

**From Address** - the email address of the sender

**Username & Password**

**Reply To Address** - email address where email is received from

**Active** - is the email account active or inactive

**Advanced Properties (Optional info)**

**Default Logo** - if you wish to associate a logo with this email account

**IMAP Folder Name** - the name of the folder you wish to associate with this email account

**Default Workflow** - if you wish to associate a default workflow with this email account

**Ticket updates** - If checked the email account will receive notifications on ticket updates

**Default Form** - if you wish to associate a default form with this email account

**Ticket Scheduling** - check this box if you want this account to receive updates on ticket scheduling

**Reminder Start Token, Reminder End Token**

**Default Priority** - if you wish to set a default priority to this email account

In order to edit a particular email account click on the entry in the table to bring up the information. From there you can edit the data as you require. Once you have completed your edits click the **Save** button to save the changes.

You can delete an email account by clicking on it in the table and clicking the **Delete** button.

## Comments or Questions

For any additional questions, please email support@errigal.com.