

# Simplify Data Entry with the DisasterLAN Ticket Wizard

Techniques, Solutions, and Best Practices

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#### Introduction

The purpose of this document is to guide administrative level DisasterLAN (DLAN) users through the process of enabling and configuring the Ticket Wizard for users and roles in their organizations. The Ticket Wizard guides users through properly making a request, offer, or report in the system. The Wizard provides step-by-step assistance for properly capturing contact information, answering resource-specific questions relevant to the type of request, inputting important date requirements, and providing any other data required to complete the request.

This document will be broken up into five main sections: Configuring Users to Use the Wizard, Configuring Roles to Use the Wizard, Configuring Ticket Wizard Steps, Configuring Ticket Wizard Custom Labels, and Using the Wizard. The first four sections teach DLAN administrators how to enable and configure the Wizard, while the last section gives a step-by-step look at the user experience when entering a Ticket via the Wizard.

For a complete training on the Ticket Wizard, please contact a BCG representative at 716-822-8668 or info@bcgeng.com.

## Section 1: Configuring Users to Use the Wizard

1. From the main menu click **Admin**  $\rightarrow$  **Site Security.** 

2016-06-03 :: 12:53:02 Daily Duty Officer Log											
My Tasks Ticket	s Communication 2845	Contacts	Documentation	Resources	Situational Awareness	Admin					
Incidents	Modules		System Setup		Users and Secu	rity					
Incident Configuration	Assets		Message Queue		Site Security						
	Briefing Notes		Service Mor	itor							

Figure 1: Navigate to Site Security in the Admin Menu

2. Choose the user you wish to turn on the Ticket Wizard for and click the **Edit** button associated with that user.

Admin: Site Security				
Users Groups Roles Mo	dules Reports Menu Admin Menu I	Page/Items Web Services		
🛟 Add 🗹 Edit 😑 Delete 🧹 Dead	ctivate 📲 Reset Password 📑 Export 🗸	Users: All Activated Users	Groups: All Groups     Roles:	All Roles
Username 🔺	Proper Name	Email	Last Logged On	Action
Dcg_abroome	broome, aaron		09/16/2013 14:29	Edit Clone
E bcg_abroome1	Broome, Aaron		05/20/2013 10:24	Edit Clone
C bcg_alertdemo	Masterson, Tim	tmasterson@bcgeng.com	03/01/2016 16:22	Edit Clone
bcg_bcarrier	Carrier, Brian		04/06/2016 09:48	Edit Clone
bcg_bcarucci	Carucci, Bruce	Bruce@gentrifi.com	11/06/2015 09:36	Edit Clone
E bcg_bhead	Head, Brian		05/04/2016 15:54	Edit Clone

Figure 2: Edit a User

3. Under the Account Settings section, look for the setting titled User Must Use Wizard to Create Tickets.

- Account Settings-	
Account is Active.	Landing Page: No Default Landing Page 🔻
User account will expire.	User Must Use Wizard to Create Tickets: Use Role Setting 💌
☑ User's password never expires.	Account will expire on:
User must change password on next logon.	
User must always accept user agreement.	Password expires every: Days
Vuser is Shown Ticket Summary on Save	User cannot change password.
V Auto-Save Tickets	User Receives Automatic Messages
User must change jurisdiction on every login.	

Figure 3: User Account Settings

4. Click the dropdown menu to view the options for this setting.

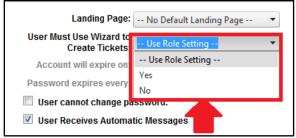


Figure 4: User Ticket Wizard Configuration Dropdown Menu

- 5. Set the Wizard preference for the user by selecting one of the options from the dropdown menu.
  - Select Use Role Setting to default the user to their role setting.
  - Select Yes to force the user to use the Wizard when creating Tickets.
  - Select **No** to disable the Wizard for the user.
- 6. Once you are finished editing the user, click **Save** at the top of the window to save the changes.

## Section 2: Configuring Roles to Use the Wizard

1. From the main menu click Admin  $\rightarrow$  Site Security.

C Discolaria ANI	2016-06-03 :: 12:53:02 Daily Duty Officer Log				
My Tasks Tickets	Communication 2845 Co	ontacts Document	ation Resources	Situational Awareness	Admin
Incidents	Modules	Sy	stem Setup	Users and Secu	rity
Incident Configuration	Assets	Message Queue		Site Security	
	Briefing Notes	Ser	vice Monitor		

Figure 5: Navigate to Site Security from the Admin Menu

- 2. Click on the Roles tab.
- 3. Select a Role to configure Wizard settings for and click Edit.

Admin: Site Secu	irity		
Users Groups	Roles	Modules	Reports
🔂 Add 🗹 Edit 🖨	Delete [	🕇 Export 👻	
Role Name 🔺			
2K Emergency Mana	gement		
3-1-1			
911 Dispatch			

Figure 6: Select a Role from the Roles Tab

- 4. Under Role Information, look for the setting titled Users Must Use Wizard to Create Tickets.
- 5. Click the dropdown to view the options for this setting.

📑 Save 😑 Delete 😣 Cancel	
	Role Information
Role:	911 Dispatch
Description:	911 Dispatch
Landing Page:	No Default Landing Page
Role Receives Automatic Messages:	©Yes©No
Users Must Use Wizard to Create Tickets:	Use System Setting 👻
	Use System Setting
Last Modified:	Yes
Modified By:	No

Figure 7: Role Ticket Wizard Configuration Dropdown Menu

- 6. Set the Ticket Wizard preference for the role by selecting one of the options from the dropdown menu.
  - Select Use System Setting to default the role preference to the system wide setting.
  - Select **Yes** to force all users under this role to use the Wizard when creating Tickets.
  - Select **No** to disable the Wizard for users under this role.
- 7. Once you are finished editing the role, click the **Save** button at the top of the window to save the changes.

# Section 3: Configuring Ticket Wizard Steps

1. From the main menu click Admin  $\rightarrow$  Ticket Manager.



Figure 8: Navigate to Ticket Manager from the Admin Menu

2. Select Ticket Wizard Steps from the menu on the left.

Ticket Contact Types	
Ticket Form Manager	1
Ticket Kind Categories	
Ticket Kinds	1
Ticket Priorities	1
Ticket Statuses	1
Ticket Tabs	1
Ticket Time Manager	1
Ticket Routing Categories	1
Ticket Wizard Custom Labels	
Ticket Wizard Steps	K.
Ticket Manager Notifications	
Ticket Manager Reports	1
Watch Command Automated Exports	1
Watch Command Daily Log Settings	
Watch Command Reports	

Figure 9: Navigate to Ticket Wizard Steps in System Administration

- 3. Administrators can customize their Ticket Wizard with terminology specific to their organization. This can be done by using the text fields to edit the headers for each Step of the Wizard.
- 4. Administrators can click the **Reorder** button to change the order of steps in the Ticket Wizard.
  - *Note*: "Type Selection" and "Kind Selection" cannot be reordered and will always appear as Steps 1 and 2 of the Wizard.)

🗐 Save 🛞 Cancel 式 Reord	der	
Type Selection:	What would you like to do?	
Kind Selection:	Categorize this ticket	
Details:	Import details we need for this ticket	
Contacts:	Contact info we need for this ticket	
Dates:	Are there any import timings we need to know?	
Incidents:	What incident(s) does this ticket impact?	
Attachments:	Add Files to this ticket	
Route To:	Who should this ticket be sent to?	
Log:	Is there any additional info we need to know?	
Summary:	Summary	

Figure 10: Configure Ticket Wizard Steps

5. Once you are finished administering the Ticket Wizard steps, click the **Save** button to save the changes.

# Section 4: Configuring Ticket Wizard Custom Labels

1. From the main menu click Admin  $\rightarrow$  Ticket Manager.

My Tasks	Tickets	Communication 2884	Contacts	Documentation	Resources	Situational Awareness	Admir
Incident	9	Modules		System S	ietup	Users and Secu	rity
Incident Co	infiguration	Assets		Message Q	seve	Site Security	
		Briefing Notes		Senice Mor	itor		
		Communicatio	n Center	Service Mar	lager		
		File Libraries		System Set	up		
		Finance					
		Forms					
		GIS					
		Incident Action	n Ptans				
		Phonebook					
		Resource Mar	agement				
		Role Checklist					
		Situation Rep:	ats				
		Special Needs					
		Status Board					
		Streaming Vid					
		Ticket Manage					

Figure 11: Navigate to Ticket Manager from the Admin Menu

2. Using the admin menu on the left hand side of the page, select the **Ticket Wizard Custom Labels**.

Admin: Ticket Manager
Ticket Contact Types
Ticket Form Manager
Ticket Kind Categories
Ticket Kinds
Ticket Priorities
Ticket Statuses
Ticket Tabs
Ticket Time Manager
Ticket Routing Categories
Ticket Wizard Custom Labels
Ticket Wizard Steps
Ticket Manager Notifications
Ticket Manager Reports
Watch Command Automated Exports
Watch Command Daily Log Settings
Watch Command Reports
Ticketing Settings

Figure 12: Navigate to System Administration Custom Labels in System Administration

- 3. Set the language to be used in the Ticket Wizard by using the **Language** dropdown menu at the top of the page. Available options are English, French, French Canadian, Spanish and German.
- 4. Use the text fields under the **General** section to customize the label for the Wizard header.
- Use the text fields under the Request, Offer or Reports sections to customize the labels used on Step 2 of the Wizard. Administrators can customize the labels for the Resources, Subject (Summary), Priority and Status labels.
- 6. Once finished administering the Ticket Wizard Labels, click **Save** to save the changes.



Figure 13: Configure Ticket Wizard Labels

### Section 5: Using the Wizard

1. From the Main Menu, navigate to the **Ticket Manager** module.



Figure 14: Navigate to Ticket Manager from the Main Menu

2. To add a new Ticket using the Wizard, click the **Add** button.

Γ	Tickets Routed to Me - This Incident (0) 🖸														
	🕂 Add	🗹 Edit	🖨 Re	emove	A Forw	vard	🖶 Print	- 🛇	Мар	.I Stats	📑 Ex	port 👻	<b>O</b> Refrest	Q Adv Search	1 Info
F	- 1		$\prec$	ID	Pr	riority		S	atus		Ту	ре	Kind		Subject
				2938		Med Prio	ium iirty			dy for mob	R	equest	4X4 \	ehicle	4x4 Vehicle Needed

Figure 15: Add a new Ticket in Ticket Manager

- 3. A new Ticket will open in Wizard mode.
- 4. The Wizard will present the user with a sequence of Steps, each asking the user pertinent information to create a complete Ticket.
  - Step 1 The Wizard asks the user to select the Type of Ticket. A user can either request something, offer something or report on something. For this example, we will request an item. Once finished, click **Next** near the top right of the Wizard to proceed to the next Step.

łew Ticket: 1 of 8					
🕄 Cancel 🕲 Help 🔍 Find Match 🔒 Secure 🔗 Full Ticket 🗡					
Next )					

Figure 16: Ticket Wizard Step 1 – Select the Ticket Type

• Step 2 - The Wizard asks the user to choose which Kind of resource they are requesting by selecting a resource from the provided list. The user then enters a Subject for the Ticket by describing the request in one sentence. Then, the user must set the Current Status and Priority of the request by selecting options from their respective dropdown menus.

New Ticket: 2 of 8				
🛞 Cancel 😰 Help 🔍 Find Match 🔒 Secure 🥸 Full Ticket 🦯				
4 Previous	Categorize this ticket	Next 🕨		
* What kind of resources would you like to request?				
Search				
© 21 tek Boom ⊘ 143 teksé ⊘ Astrika Pala ⊘ Anard Agendus, Fra © Anard La - Andicatarg Bom — Anard La - Andicatarg Bom		•		
* Please summarize this request is one sentence.				
What is the current status of this request?				
New Ticket				
VMat is the priority of this request? No Priority				

Figure 17: Ticket Wizard Step 2 – Categorize the Ticket

• *Step 3* - The Wizard asks the user to add any contacts associated with the Ticket. This is analogous to the **Contacts** tab in the traditional or full Ticket mode.

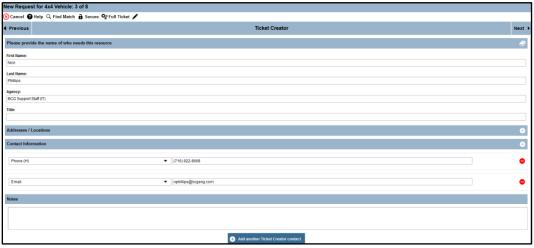


Figure 18: Ticket Wizard Step 3 – Add Ticket Contacts

• *Step 4* - The Wizard asks the user to set any pertinent date and time information related to the Ticket. This is analogous to the **Dates** section under the **Details / Forms** tab in full Ticket mode.

New Request for 4x4 Vehicle: 4 of 8					
Cancel @ Help Q Find N	⊗ Cancel 🕑 Help 🔍 Find Match 🔒 Secure 🗞 Full Ticket 🖍				
Previous	Are there any import timings we need to know?	Next >			
Due Date:		<b>#</b> 🕒			
Est. Completion Time:		<b>#</b> 0			
Completed Time:		<b>#</b> 0			
Actual Time:		<b>*</b> 🕑			
Mission Critical Time:		<b>*</b> 🕑			
Finance Reimbursement Date:		<b>#</b> 🕑			
Estimated Due Date:		<b>*</b> 🕑			

Figure 19: Ticket Wizard Step 4 – Add Dates and Times to Ticket

• *Step 5* - The Wizard asks the user to assign this Ticket to an Incident by selecting an Incident from the provided list. This is analogous to the **Incidents** section under the **Details / Forms** tab in full Ticket mode.

New Request for 4x4 Vehicle: 5 of 8			
🛞 Cancel 😰 Help 🔍 Find Match 🔒 Secure 🍄 Full Tic	tet /		
Previous	What incident(s) does this ticket impact?	Next	
Search		Show Selected Only	
All A - Texas Flooding A Preview Mantic Potash Corp Bar of Fundr Oll Solili			

Figure 20: Ticket Wizard Step 5 – Assign the Ticket to an Incident

• *Step 6* - The Wizard asks the user to upload and attach any files that should be associated with the Ticket. This is analogous to the **Attachments** tab in full Ticket mode.

New Request for 4x4 Vehicle: 6 of 8		
🛞 Cancel 🚱 Help 🔍 Find Match 🔒 Secure 📽 Full Ticket 🖍		
	Add Files to this ticket	Next 🕨

Figure 21: Ticket Wizard Step 6 – Attach Files to this Ticket

• *Step 7* - The Wizard asks the user to choose who this Ticket will be routed to. This is analogous to the **Route To** tab in full Ticket mode.

New R	New Request for 4x4 Vehicle: 7 of 8				
Can	🛞 Cancel 🔀 Help Q. Find Match 🏦 Secure 😍 Full Ticket 🦯				
<b>∢</b> Prev	ious Who should this ticket be sent to?	Next 🕨			
R	de	Q			
	2K Emergency Management Not Currenty Staffed	A			
	3.4.1 Katalan Katal	1			
	911 Dispatch Not Currently Staffed				
	Aberdeen Communications Lead Not Currently Staffied				



- *Step 8* The Wizard asks users to add any additional information that may be pertinent to the Ticket. This is analogous to the **Logs** tab in full Ticket mode.
  - Note: The Next button becomes a Save button in this step. Click Save to finish the process and add the Ticket to the system.

Ne	New Request for 4x4 Vehicle: 8 of 8				
$\otimes$	Cancel 🕜	Help Q. Find Match 🏦 Socure 🐶 Full Ticket 🖌			
•	revious	Is there any additional info we need to know?	8		
1	9 Arial	• 12pt • A • B I 显 A ◆ 展 書 課 課 任 任			
Γ			٦		
L			Ш		

Figure 23: Ticket Wizard Step 8 – Add Additional Information to Ticket

#### Conclusion

The Ticket Wizard provides a powerful way of making new users quickly proficient in the system. To assist the occasional or new user with the Ticket creation process, the Ticket Wizard presents users with a series of questions that guide them to provide the necessary information more naturally. This document illustrates how administrators can enable the Wizard for specific users or roles, and configure the Wizard to best suit their organization. By allowing the system to guide users through the process of creating a Ticket, organizations can spend less time training users and more time effectively managing incidents and events.