



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** → **Site Security**.

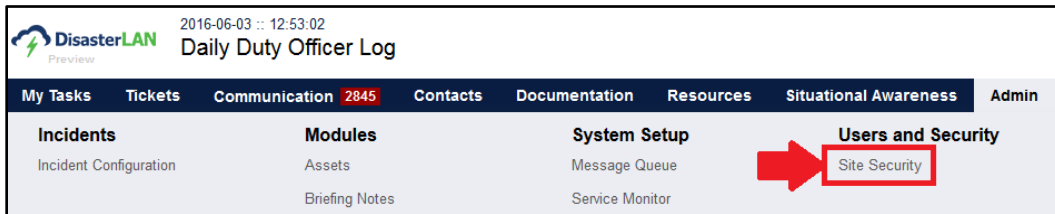


Figure 1: Navigate to Site Security in the Admin Menu

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

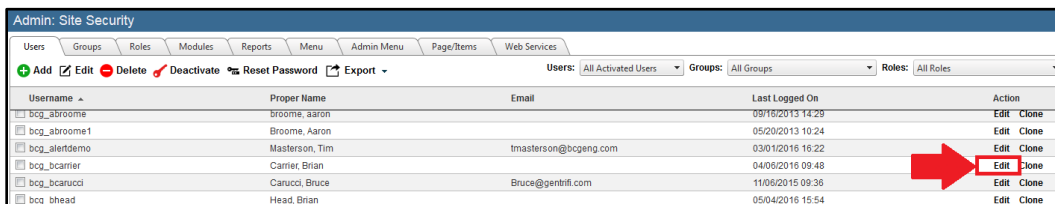


Figure 2: Edit a User

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



Figure 3: User Account Settings

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

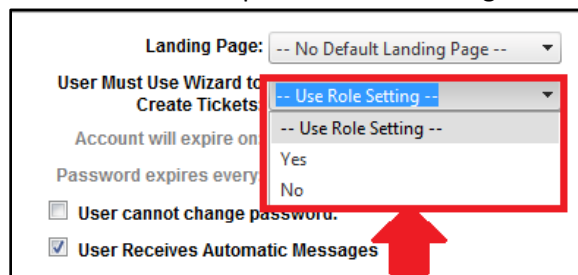


Figure 4: User Ticket Wizard Configuration Dropdown Menu

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** → **Site Security**.

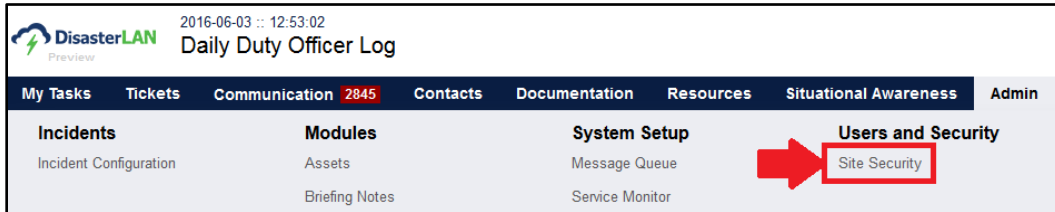


Figure 5: Navigate to Site Security from the Admin Menu

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

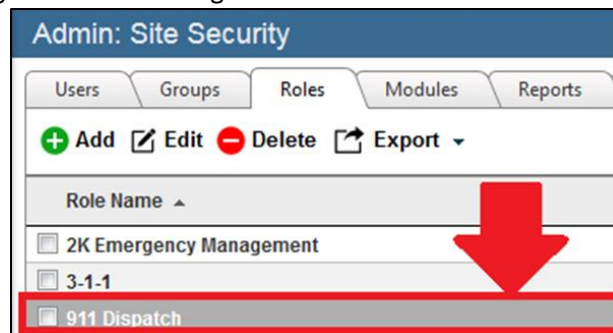


Figure 6: Select a Role from the Roles Tab

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.

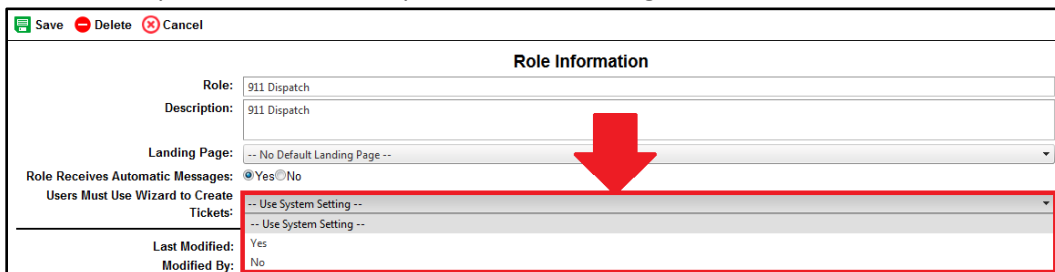


Figure 7: Role Ticket Wizard Configuration Dropdown Menu

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** → **Ticket Manager**.

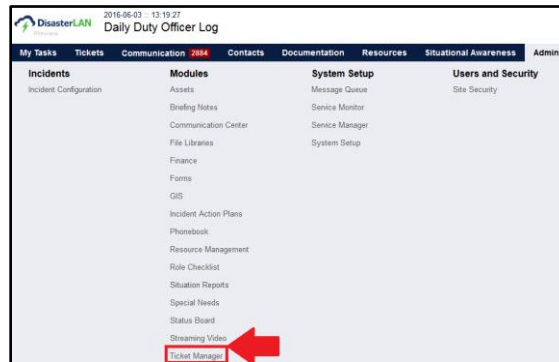


Figure 8: Navigate to Ticket Manager from the Admin Menu

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

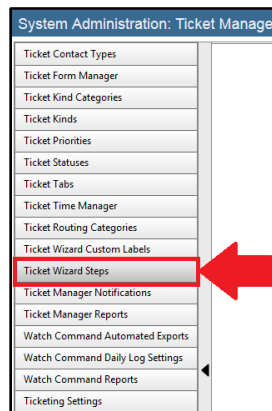


Figure 9: Navigate to Ticket Wizard Steps in System Administration

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.)*

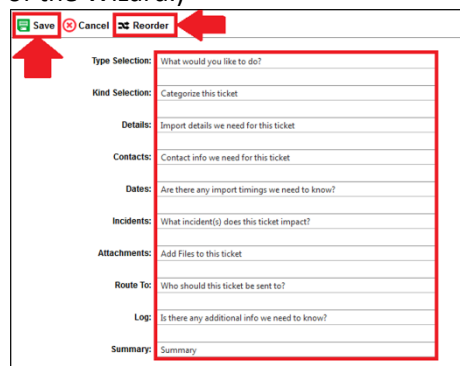


Figure 10: Configure Ticket Wizard Steps

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** → **Ticket Manager**.

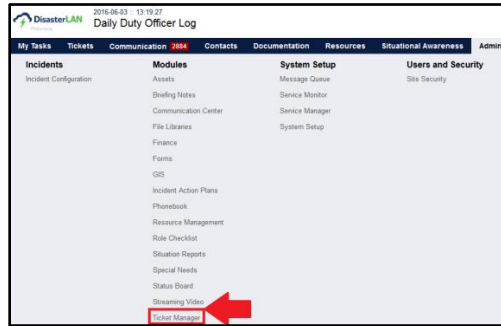


Figure 11: Navigate to Ticket Manager from the Admin Menu

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

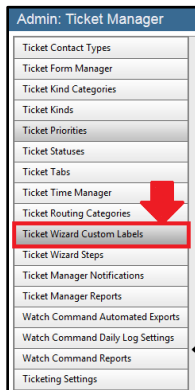


Figure 12: Navigate to System Administration Custom Labels in System Administration

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.
5. 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.

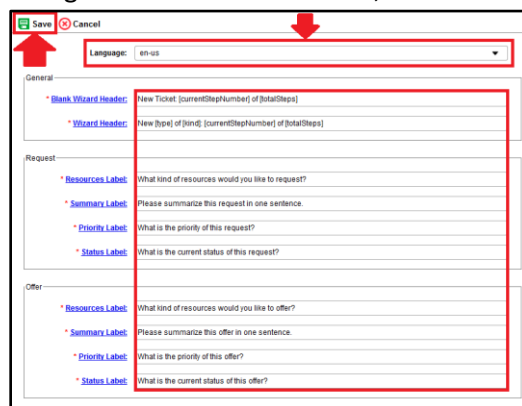


Figure 13: Configure Ticket Wizard Labels

Section 5: Using the Wizard

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

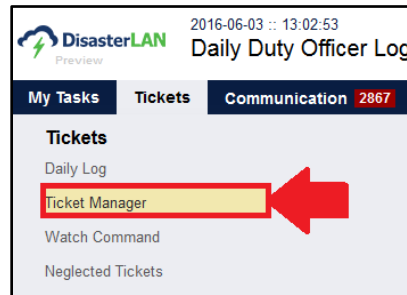


Figure 14: Navigate to Ticket Manager from the Main Menu

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

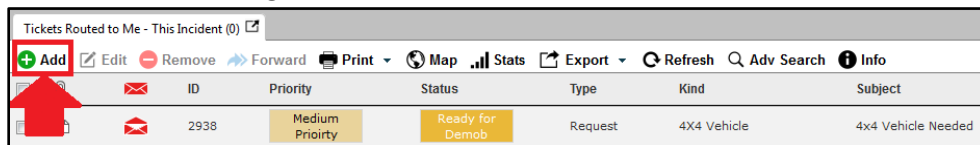


Figure 15: Add a new Ticket in Ticket Manager

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.

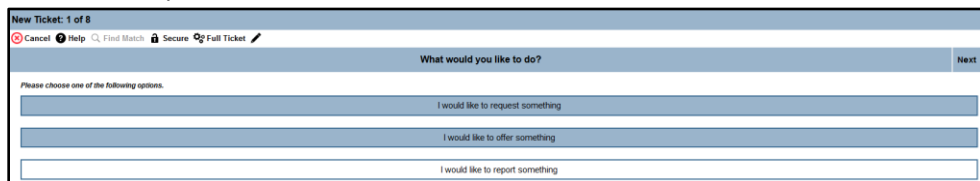


Figure 16: Ticket Wizard Step 1 – Select the Ticket Type

- *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.

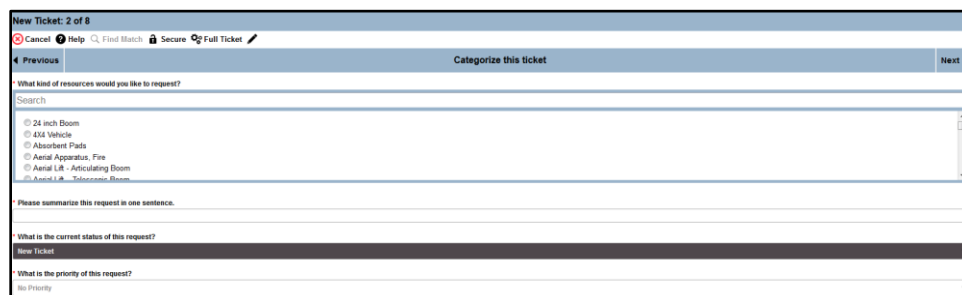


Figure 17: Ticket Wizard Step 2 – Categorize the Ticket

- *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.

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.

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.

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.

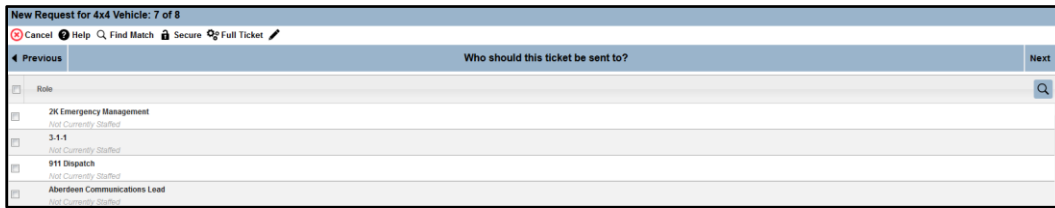


Figure 22: Ticket Wizard Step 7 – Route Ticket to Roles

- *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.

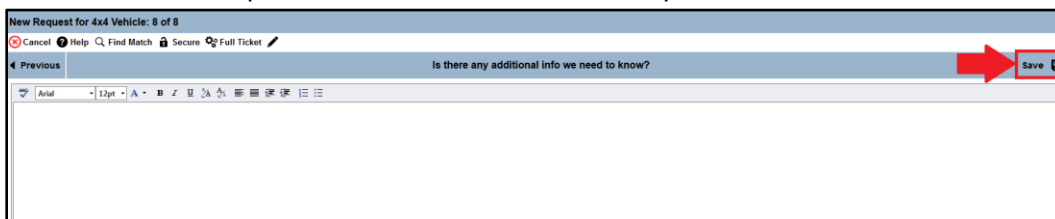


Figure 23: Ticket Wizard Step 8 – Add Additional Information to Ticket

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.