TASCOMP

User Manual

Support Tracker

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Revision History

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Description				
Initial version of the User Manual created.				

Contents

1. Overview

The Support Tracker is Tascomp's newly developed internal tool, designed specifically for efficient support ticketing. As the requirements of our users of the Prodigy, PlantRun, and PAMS systems have grown, so has the need for a more specialised solution, and the Support Tracker aims to meet this demand.

Document Structure

This user guide is bifurcated into two main sections:

- **Presentation Scope:**
  This segment encompasses an understanding of the tool's prototype form. Within this scope, users will gain an insight into the initial design of the Support Tracker and the visualisation aspects of the tool.

- **Deployment Scope:**
  Diving deeper into the operational aspects, this section provides intricate details on the ticket creation, management, and overview tools. From the inception of a support ticket to its conclusion, this section will guide users through the journey of ticket handling within the Support Tracker.

2. Presentation Scope

The Presentation Scope of this guide offers insights into the initial design and layout of the Support Tracker tool. Within this section, readers will be familiarised with the prototype design, interface layout, and the foundational visual elements which constitute the user experience. It serves as a primer to help users understand the intent, structure, and user interface of the Support Tracker before diving into the more in-depth operational aspects covered in the Deployment Scope.

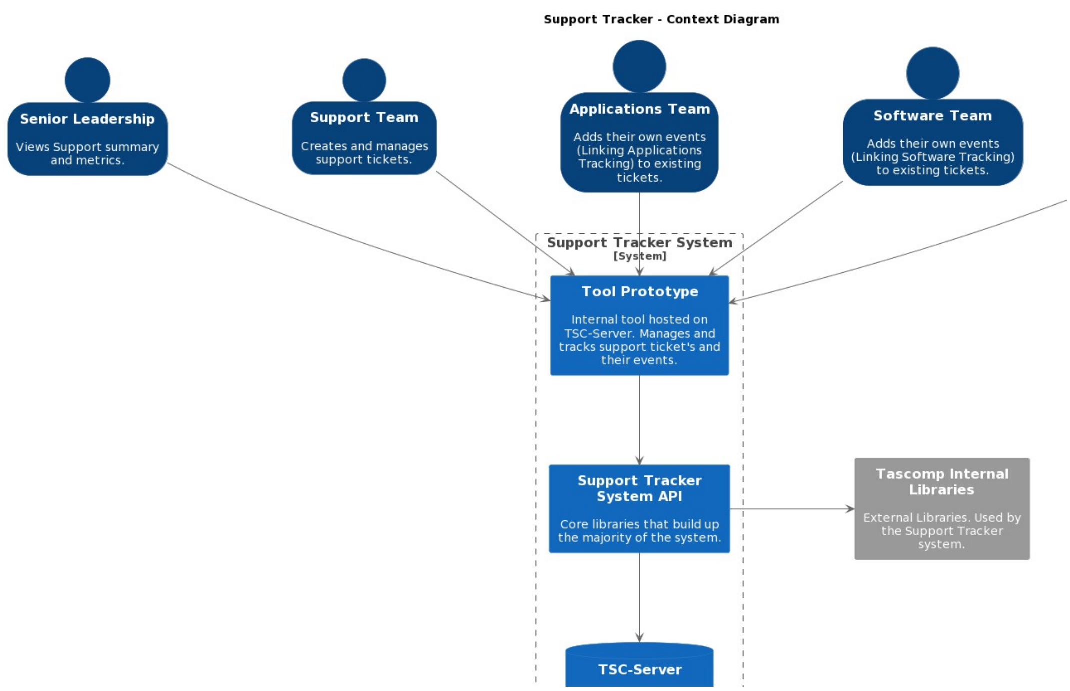
Understanding the Presentation Scope is vital for users to ensure smooth navigation and efficient use of the tool, providing a basis upon which the subsequent sections can build.

2.1 Tool Prototype

The Tool Prototype is the preliminary version of the Support Tracker system's front-end, conceptualised to address the evolving needs of Tascomp's client base. It provides a comprehensive framework that allows for the management and tracking of support tickets and their associated events.

2.1.1 Design and Architecture

The following diagram is the `Context Diagram` for Support Tracker using the Tool Prototype:



Referencing the Context Diagram, here's a breakdown of the Tool Prototype:

1. **Internal Hosting:**
   The Tool Prototype is hosted internally on the `*TSC-Server*`, making it accessible only to Tascomp employees.

2. **Functionalities**:
   - **Support Ticket Management:**
     Enables the Support Team to create, view, and manage support tickets effectively.

   - **Event Addition:**
     Teams, namely the Applications, Software, and Hardware Teams, can add their specific events to existing tickets. This facilitates a holistic view of the ticket's lifecycle, considering all involved departments.

3. **Support Tracker System API:**
   This is the backbone of the prototype, comprising core libraries that dictate the tool's functionalities. It interacts seamlessly with the `*TSC-Server*` and the `*Tascomp Internal Libraries*` to ensure efficient performance.

4. **Data Management:**
   All support tickets and their related events are stored securely in the `*TSC-Server*`, which is an MS SQL Server. This ensures data integrity and easy retrieval of support-related information.

5. **Stakeholder Interaction:**
   - **Senior Leadership:**
     They have access to view support summaries and pertinent metrics, enabling them to oversee the support landscape.

   - **Support Team:**
     Entrusted with the primary role of creating and managing the support tickets.

   - **Applications, Software, & Hardware Teams:**
     Apart from their core roles, they have the added responsibility of appending their unique events to the tickets, providing context from their respective domains.

6. **External Dependencies:**
   The prototype leverages Tascomp Internal Libraries, external libraries that offer additional functionalities and tools, ensuring a seamless user experience across Tascomp's programs.

Understanding the Tool Prototype and its architecture is fundamental for all stakeholders to utilise it effectively. The context diagram visually encapsulates its design, underlining its intricate relationships and functionalities.

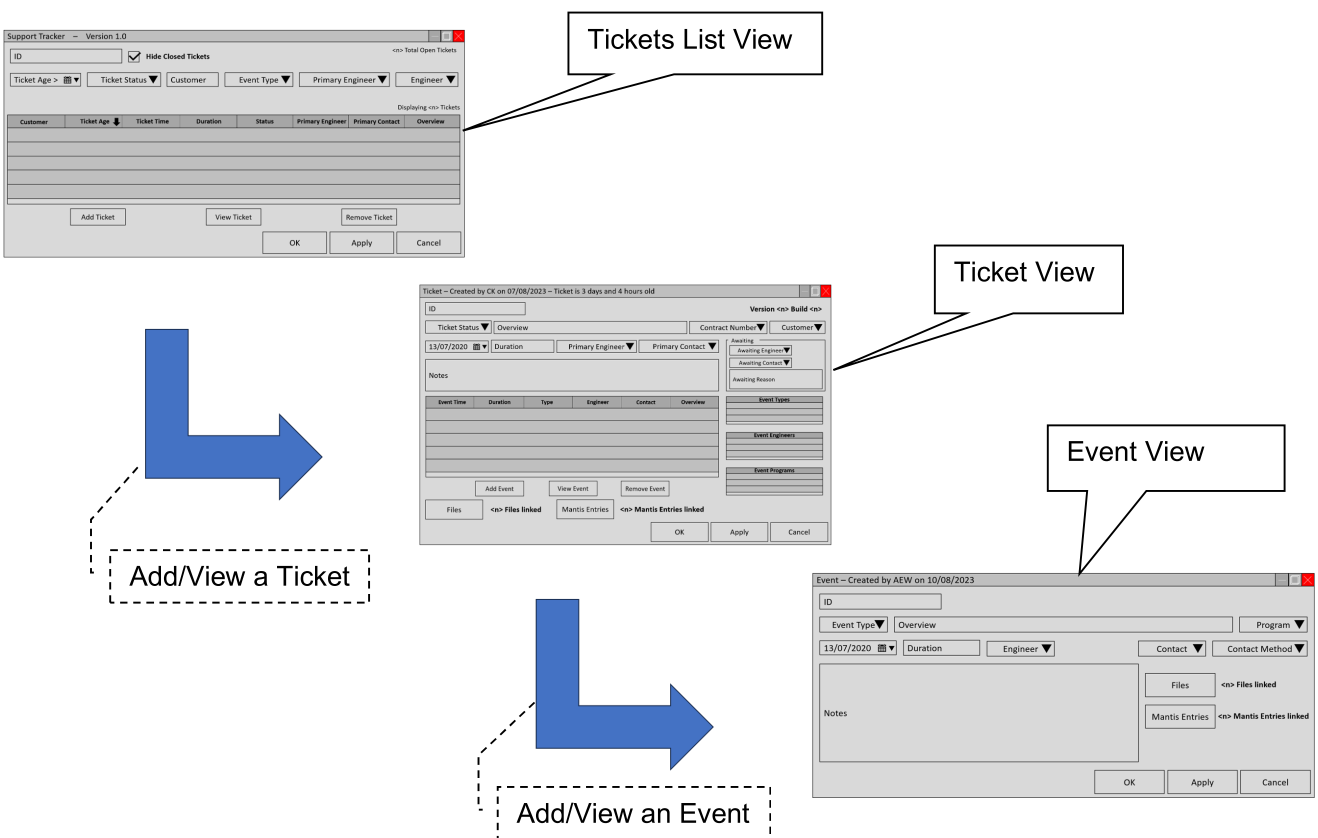
2.1.2 User Interface

The Tool Prototype is comprised of 3 main views within the tool prototype's form:

- Tickets List View
- Ticket View
- Event View

There will also be 2 further views that are presented in a sub-form:

- Linked Files View
- Mantis References View



2.1.3 Creating a Ticket

Creating a ticket is the method of logging new inquiries, issues, or support requests within the Support Tracker tool. This section outlines the steps required to efficiently create a new ticket, ensuring that your support needs are adequately addressed.

1. **Access the Ticket Creation Interface**
   - From the tickets list view of the Support Tracker, locate and click on the Add button, positioned at the bottom of the tickets list.

2. **Enter Ticket Details**
   - Upon accessing the ticket creation interface, you'll be presented with various fields.
   - Some of these fields will already be populated with data, some of these fields will require data to be entered in to them, and some of these fields will be available to have data entered into them but are not required to.
   - These fields are described in the table on the following page.

3. **Review and Confirm**
   - Before finalising the creation of the ticket, review all the provided details to ensure accuracy.
   - Once satisfied, click on the Submit or Create Ticket button to log the ticket into the system.

4. **Confirmation and Ticket ID**
   - After submission, a confirmation message will appear, indicating the successful creation of the ticket.
   - Take note of the unique ticket ID provided. This ID should be provided to the `Primary Contact` for the purpose of tracking progress and any subsequent communication about the ticket.

Important Considerations

- Always ensure that the information provided is accurate and comprehensive. The more detail you provide, the more efficiently the support team can address the issue.
- Take note of the Ticket ID presented. This identifier is essential for any follow-ups or queries about the ticket and should be passed back to the 'Primary Contact' for the ticket so that they can keep it for their own tracking and follow up.

Ticket Fields

The following table describes the fields present on the ticket creation page.

Accessible Ticket Information			
Information	**Required**	**Provided by Default**	**Mutable**
Ticket ID	~ *<Calculated>*	Yes	No
Ticket Status	Yes	Yes	Yes
Ticket-Event Types	Yes	No	Yes ~ *(Mutated by Event Types)*
Contract Number	Yes	No	Yes ~ *(Mutates Customer)*
Customer	Yes	No	Yes ~ *(Mutates Contract Number)*
Build and Number	~	Yes ~ *(Provided by the selected customer or contract number)*	No
Primary Engineer	Yes	Yes	Yes
Primary Contact	Yes	No	Yes
Related Programs	No	No	Yes ~ *(Mutated by Event's Programs)*
Overview	Yes	No	Yes
Notes	No	No	Yes
Awaiting Reason	No	No	Yes
Awaiting Engineer	No	No	Yes
Awaiting Contact	No	No	Yes
Ticket Creation Date	~ *<Calculated>*	Yes	No
Ticket Closed Date	~ *<Calculated>*	Yes ~ *(Only If Ticket is Closed)*	No
Ticket Creation Engineer	~ *<Calculated>*	Yes	No
Ticket Closed Engineer	~ *<Calculated>*	Yes ~ *(Only If Ticket is Closed)*	No
Time Since Ticket Creation	~ *<Calculated>*	Yes	No
Ticket Duration	~ *<Calculated>*	Yes	No
Linked Files	No	No	Yes ~ *(Also mutated by last Ticket Event)*
Linked Mantis References	No	No	Yes ~ *(Also mutated by last Ticket Event)*

2.1.4 Viewing/Editing a Ticket

At times, there might be a need to review the details of a ticket or make modifications to the information it contains. The Support Tracker system makes it seamless to view and edit tickets as required. Here's how you can achieve this:

1. **Accessing the Ticket List**
   - From the tickets list view, navigate to the list or grid of existing tickets. This list displays all logged tickets, along with crucial details such as the ticket title, date of creation, priority, and current status.

2. **Viewing a Ticket**
   - Using Direct Selection: Locate the ticket you wish to view. Double-click on its row or entry to open the ticket's detailed view. This will replace the main ticket view with the selected ticket's detailed information.
   - Using the 'View' Button: Alternatively, once a ticket's row is selected, you can click on the View button, typically positioned above or below the ticket list, to access the ticket details.

3. **Editing a Ticket**
   Once you're in the detailed ticket view:
   - Locate and click on the Edit button, usually found at the top or bottom of the ticket details page.
   - The ticket fields will become editable, allowing you to make changes as needed. You can adjust aspects such as the ticket title, description, priority, and any other modifiable details.
   - If there are any attachments or linked files associated with the ticket, you can manage these from the ticket view as well. Options will typically be available to add, remove, or view these attachments.

4. **Saving Changes**
   - After making all necessary modifications, review the changes to ensure they reflect the intended updates.
   - Click on the Save or Update button to apply the edits. It's essential to do this before navigating away from the ticket view, as unsaved changes may be discarded.
   - A confirmation message might appear to inform you of the successful update.

5. **Returning to the Ticket List**
   - To navigate back to the main ticket list, locate and click on a Back or Return to Tickets button, typically positioned at the top or bottom of the ticket details page.

2.1.5 Removing a Ticket

The Support Tracker tool has been designed to facilitate the management of support tickets with utmost efficiency. There may be instances where a ticket needs to be removed from the visible list for various reasons, including redundancy or miscreation. This section will guide you through the process of removing a ticket.

1. **Locate the Desired Ticket**
   - Navigate to the tickets list view. This will display a list of all tickets.
   - Use the provided filters or search functionalities to locate the specific ticket you wish to remove.

2. **Initiate the Removal Process**
   - Once you've identified and selected the desired ticket, look for the `` `*Remove*` `` button, typically located near the ticket details.
   - Click on the `` `*Remove*` `` button.

3. **Confirm Removal**
   - After clicking the Remove button, a message box will appear asking,
     `Are you sure you would like to remove the selected ticket?`
     With options {Yes, No}.
   - If you're certain about your decision, click on the `` `*Yes*` `` button.

4. **Final Steps**
   - After confirming the removal, you'll be redirected back to the tickets list view.
   - The ticket list will update, and the removed ticket will no longer be visible.
   - Any associated events or linked files with the ticket will also be marked as deleted but, similar to the ticket, they are not permanently erased from the database.

5. **Underlying Mechanics**
   - It's essential to note that, from a database perspective, the ticket is not completely deleted. Instead, it's marked as deleted. This ensures data integrity and allows for potential data recovery if needed.
   - Once marked as deleted, the ticket will no longer appear in the tickets list view or any related lists or search results.

Important Considerations

- After confirming the removal, you'll be redirected back to the tickets list view.
- The ticket list will update, and the removed ticket will no longer be visible.
- Any associated events or linked files with the ticket will also be marked as deleted but, similar to the ticket, they are not permanently erased from the database.

2.1.6 Creating an Event

The creation of an event is pivotal for logging specific actions, decisions, or milestones related to a ticket. Events can encompass anything from updates on ticket progress to notes on customer interactions. Here's how to create an event within the Support Tracker:

1. **Accessing the Desired Ticket**
   - Before you can add an event, you must first navigate to the ticket to which you'd like to attach the event.
   - From the ticket's list, select the ticket you're interested in either by double-clicking on its row or selecting it and using the `*View*` button.

2. **Navigating to Event Creation**
   - Within the ticket view, locate the section or tab labelled "Events" or a similar designation.
   - There should be a button labelled `*Add Event*`. Click on this button.

3. **Inputting Event Details**
   - Once you've initiated the event creation process, you'll be presented with various fields.
   - Some of these fields will already be populated with data, some of these fields will require data to be entered in to them, and some of these fields will be available to have data entered into them but are not required to.
   - These fields are described in the table on the following page.

4. **Saving the Event**
   - After entering all the event details, click the `*Add Event*` button. This action will log the event and associate it with the ticket you're currently viewing.
   - You might see a confirmation message indicating that the event has been successfully added.
   - You will then be redirected back to the ticket's view, which has been appropriately updated with the added event.

Event Fields

The following table describes the fields present on the event creation page.

Accessible Event Information			
Information	**Required**	**Provided by Default**	**Mutable**
Event ID	~ *<Calculated>*	Yes	No
Event Types	Yes	No	Yes
Event Engineer	Yes	Yes	Yes
Event Contact	Yes	No	Yes
Related Program	No	No	Yes
Overview	Yes	No	Yes
Notes	No	No	Yes
Event Creation Date	~ *<Calculated>*	Yes	No
Event Creation Engineer	~ *<Calculated>*	Yes	No
Event Timestamp	Yes	Yes	Yes
Event Duration	Yes	Yes	Yes
Linked Files	No	No	Yes
Linked Mantis Reference	No	No	Yes

2.1.7 Viewing/Editing an Event

Being able to view and edit events is an essential aspect of the Support Tracker. This feature allows you to revisit specific actions or decisions related to a ticket and make necessary amendments if circumstances change. Here’s a detailed guide on how to view and edit an event:

1. **Accessing the Desired Ticket**
   - Start by navigating to the ticket associated with the event you wish to view or edit.
   - From the tickets list view, select your desired ticket either by double-clicking on its row, selecting it and pressing the `*View*` button, or using other access methods detailed in the ticket viewing section.

2. **Locating the Event**
   - Once inside the ticket view, find the section or tab labelled “Events” or a similar designation.
   - The events associated with the ticket will be listed here. Browse through to find the specific event you want to view or modify.

3. **Viewing the Event**
   There are several methods to view an event based on user preferences:

   - **Double-click:** Simply double left-click on the event’s row to open its detailed view.
   - **View Button:** With the event’s row selected, click on the View button to see its details.
   - **Space Bar:** Alternatively, with the event’s row highlighted, pressing the space bar will also take you to the event’s detailed view.
   - **Context Menu:** If there’s a visible context menu for the event list, selecting the View menu item will open the chosen event’s details.

4. **Editing the Event**
   - While in the event’s detailed view, there should be an Edit button or similar option. Click on this to enter the editing mode.
   - You’ll be presented with same fields as when creating an event, reference the previous page for details.

5. **Saving Changes**
   - Once you’ve made your edits, always remember to save. Click the Save or Update Event button.
   - A confirmation message may appear, indicating that the event details have been successfully updated.
   - You will then be redirected back to the ticket’s view, which has been appropriately updated with the updated event.

2.1.8 Removing an Event

In the context of the Support Tracker, "removing" an event does not erase it permanently from the database. Instead, it's marked as "deleted" to maintain a comprehensive record of all activities. This feature ensures transparency and traceability in the ticketing process. Here's how to mark an event as deleted:

1. **Accessing the Relevant Ticket**
   - Navigate to the ticket associated with the event you wish to remove.
   - From the tickets list view, select your desired ticket either by double-clicking on its row, selecting it and pressing the View button, or by using other access methods detailed in the ticket viewing section.

2. **Locating the Event to Remove**
   - Within the ticket view, head to the section or tab labelled "Events" or its equivalent.
   - The associated events for the ticket will be displayed. Browse the list to find the event you intend to mark as deleted.

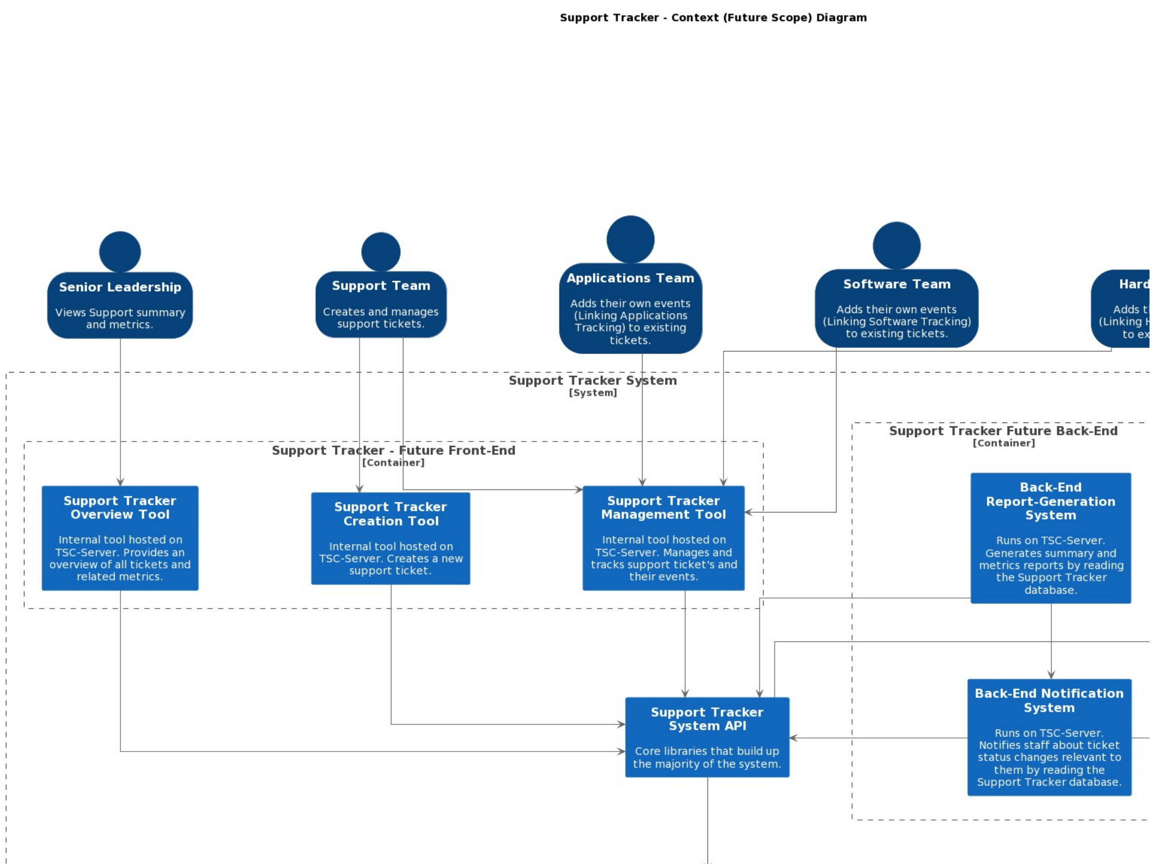
3. **Initiating the Remove Process**
   - There are different ways to initiate the removal process:
   - **Remove Button:** With the event's row selected, press the `*Remove*` button.
   - **Context Menu:** If there's a visible context menu for the event list, using the `*Remove*` option will also initiate the deletion process.

4. **Confirming the Removal**
   - Once the remove process is initiated, a message box will pop up asking, "Are you sure you would like to remove the selected event?" Two options will be available: `*Yes*` and `*No*`.
   - Selecting `*Yes*` will mark the event as deleted.
   - Opting for `*No*` will cancel the operation, and the event will remain unchanged.

5. **Notifying of Removal**
   - Upon confirmation of removal, several updates will take place:
   - The event is marked as deleted and will no longer be visible in the ticket's event list.
   - Associated lists such as event types, engineers, and programs will be updated to reflect the change.
   - The `*Cancel*` button becomes enabled, allowing users to revert changes if necessary.

3. Deployment Scope

As Tascomp's Support Tracker system evolves, our vision expands beyond the initially discussed prototype. We're paving the way for a more diverse and advanced set of tools that build upon the initial Support Tracker functionalities. The future envisages separate front-end tools designed for specific purposes, all interfacing seamlessly with the unified Support Tracker System API.



3.1 Ticket Creation Tool

- **Functionality:**
  - As the name suggests, this tool focuses on the creation of new support tickets.
  - It has been specifically designed for ease of use, ensuring rapid ticket creation with all necessary details.

- **User Base:**
  - **Support Team:**
    Entrusted with the responsibility of creating new tickets as and when required.

- **Infrastructure:**
  - Hosted internally on the TSC-Server.
  - Directly interfaces with the Support Tracker System API for ticket creation operations.

3.2 Ticket Management Tool

- **Functionality:**
  - A comprehensive tool designed for the management and tracking of support tickets and their associated events.
  - Allows addition of events related to various domains such as applications, software, and hardware.

- **User Base:**
  - **Support Team:**
    Manages and tracks support tickets and their events.
  - **Applications Team:**
    Adds application-related events to existing tickets.
  - **Software Team:**
    Incorporates software-related events to the tickets.
  - **Hardware Team:**
    Integrates hardware-related events to the tickets.

- **Infrastructure:**
  - Hosted internally on the TSC-Server.
  - Directly interfaces with the Support Tracker System API for ticket management operations.

3.3 Ticket Overview Tool

- **Functionality:**
  - This tool offers a consolidated view of all active tickets and their related metrics.
  - Senior leadership can harness this tool for gauging the efficiency and performance of the support structure.

- **User Base:**
  - **Senior Leadership:**
    Uses the tool to view support summaries and derive metrics.

- **Infrastructure:**
  - Hosted internally on the TSC-Server.
  - Directly interfaces with the Support Tracker System API for fetching ticket and metric data.