Admin Guide

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Introduction

The Voyager Incident Management System is a Help Desk Ticketing system. There are various components in the system that will help your company better track your incidents. This guide will help you learn the different components of the system and teach you how to use the system to its fullest extent to increase the overall productivity of your company and the Voyager Incident Management System.

Privileges

The Administrators are split into two types, a System Administrator and a Technician. The information below displays what access each type has access to.

System Administrator

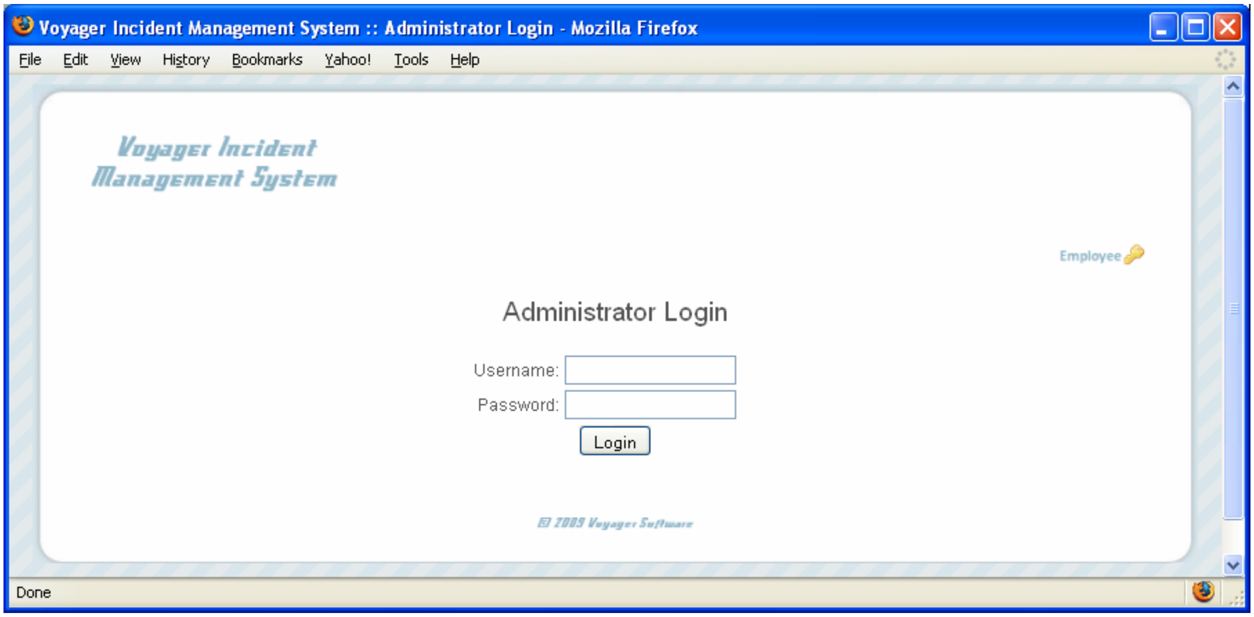
- Incidents
- Categories
- Knowledge Base
- Articles
- Computers
- Users
- Locations
- Admins
- Reports

Technician

- Incidents
- Knowledge Base
- Articles (View Only)

Logging in

On the User Login page, click on the Admin button in the upper right hand corner. Enter your username and password and click “Login”. You will automatically be directed to the Incidents page. If you need a login, contact a System Administrator who will be able to create an account for you or reset your password.



Toolbar

The toolbar below is accessible on every page of the system. The toolbar allows quick navigation through the system.

The components of the toolbar are described below.

These links allows quick access to the main components of the system. For more information about the components see their respective sections in the Admin Guide.

These links follow the site tree. It allows quick access to return to the previous page.

 Click on this button to access this help guide.

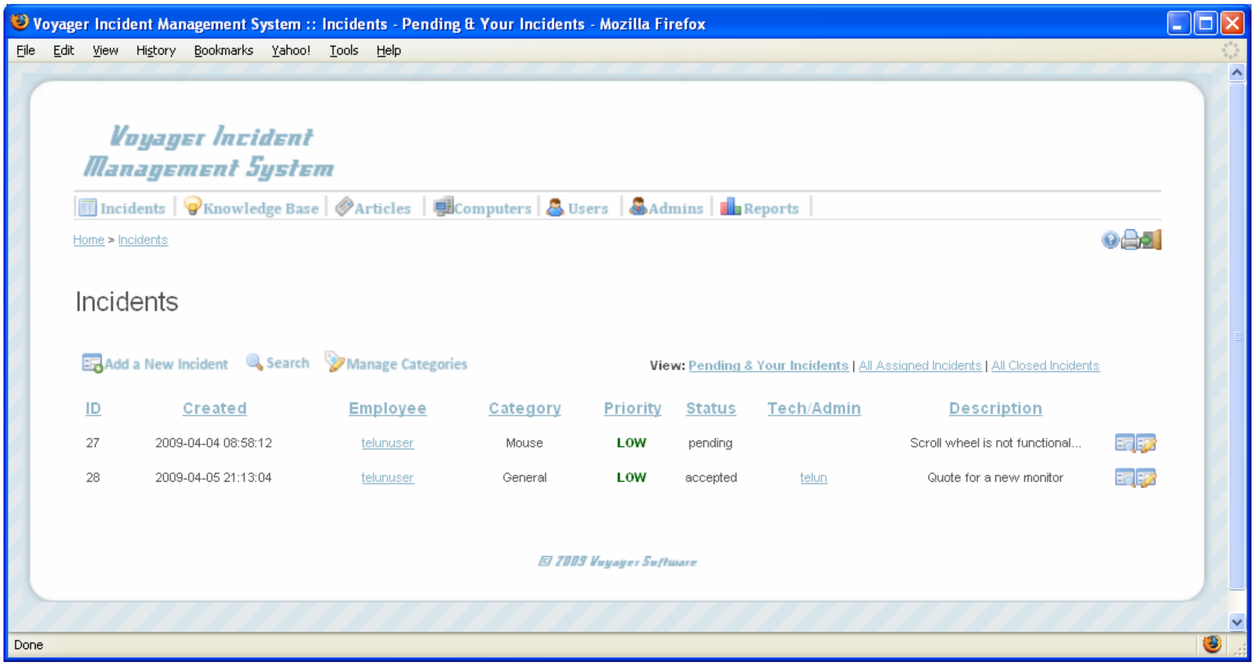
 This button will print out the current page.

 Click this button to log out of the system.

Incidents

The Incidents page is the main page that you will use to manage the problems that users submit to the Information Technology department. There are three separate Views for the incidents. Each view provides information on different incidents on a high level. Technicians and

Administrators should manage the calls assigned to them and make sure calls that are pending are assigned to a Technician or Administrator. This is the page that loads when you first log in.

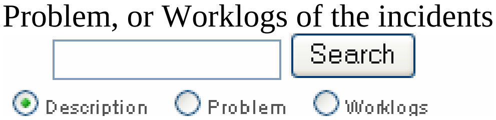


Pending & Your Incidents Displays all incidents that have not been assigned a Technician or Admin yet and any incidents that are assigned to you.

All Assigned Incidents Displays all incidents that are assigned to other Technicians or Administrators.

All Closed Incidents Displays all incidents that are Resolved, Duplicate, Inaccurate, or Unresolvable.

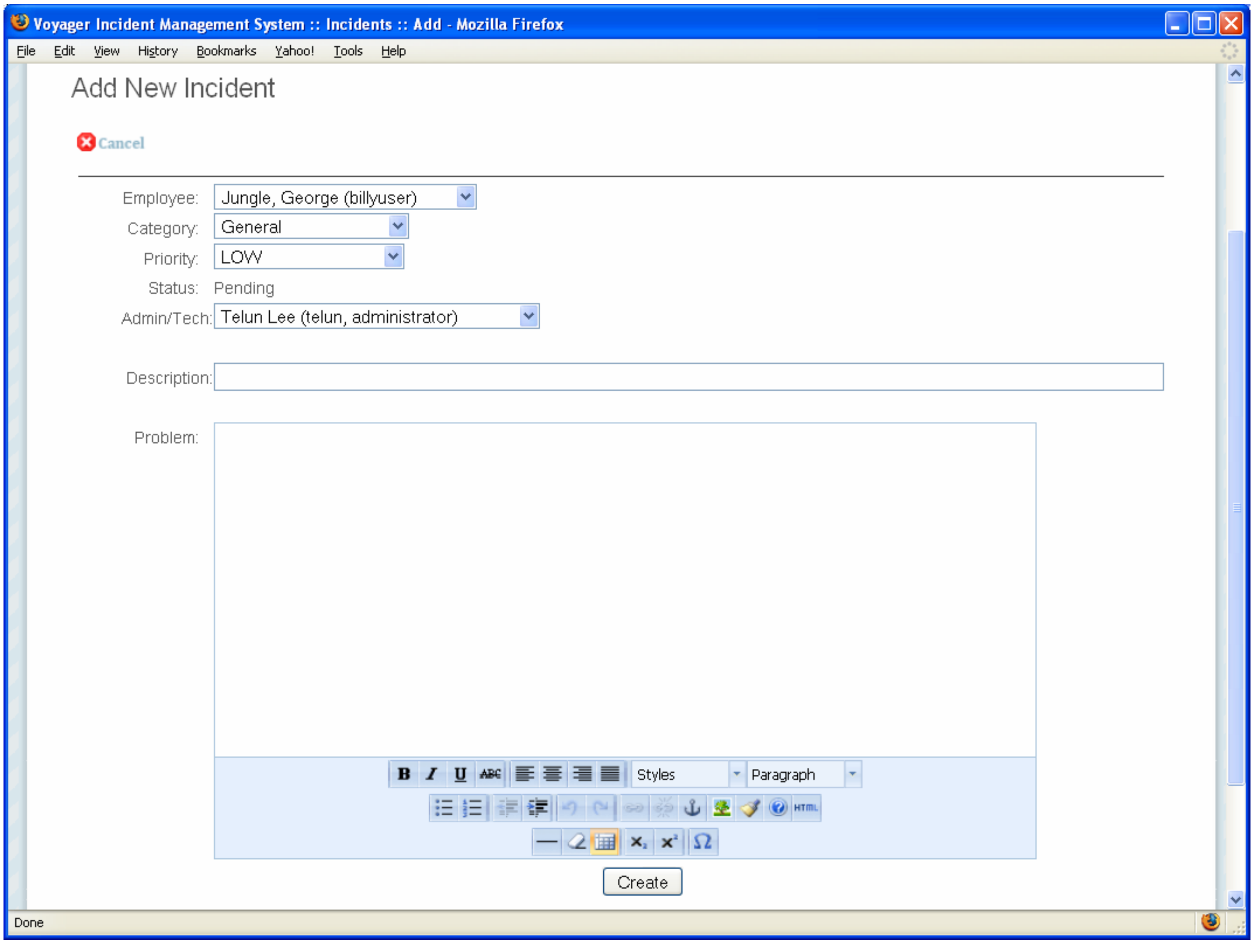
Search A Search feature is also available. It allows you to search through the Description, Problem, or Worklogs of the incidents and create a list of the results.



Add a Incident

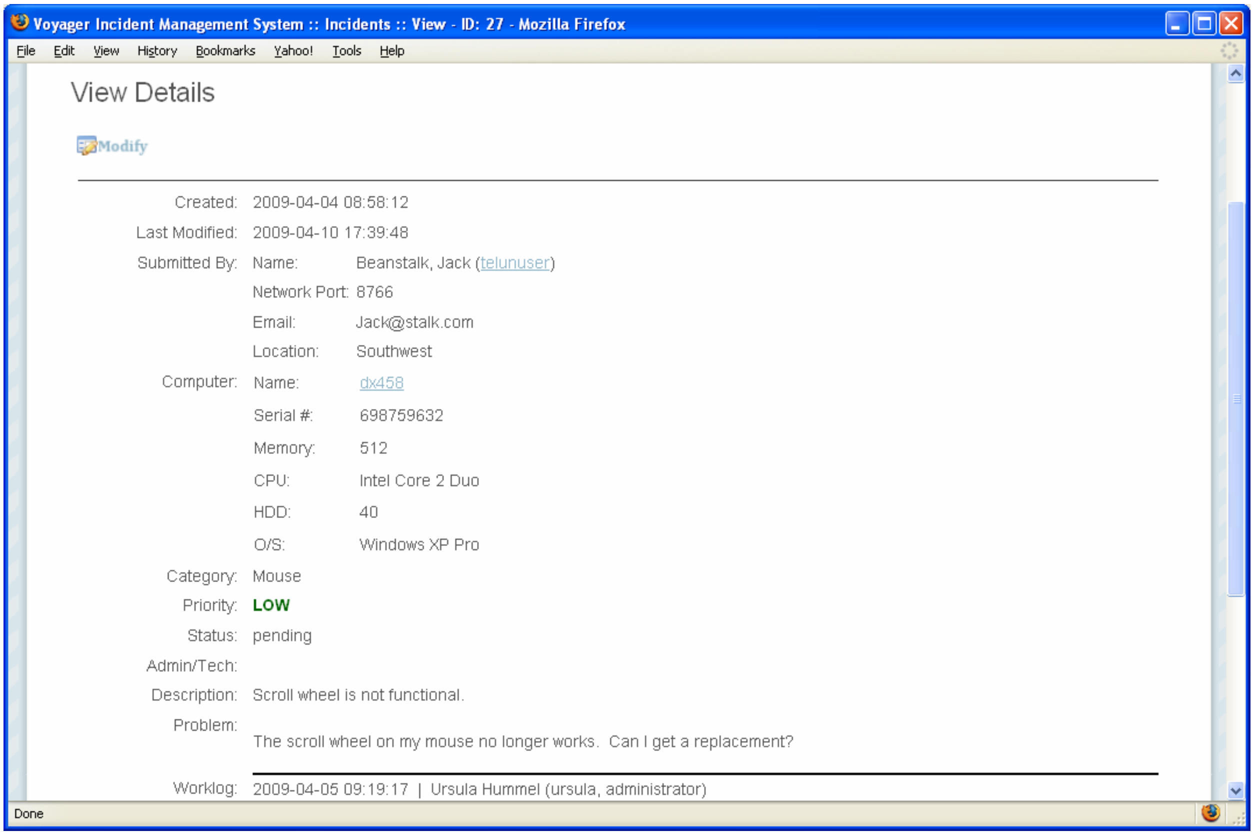
A Technician or Administrator may want to add new incidents. Many Help Desks receive their incidents outside of their ticketing system. For example, if a user cannot log into the system, they will call you. The person who works on or resolves the issue may want to add the incident so it is recorded.

To add an incident click on the Add a New Incident button. You will need fill out the form. Select the name of the Employee who submitted the incident, the Category the incident belongs to, and the Priority of the incident. Your information should be pre-filled in the Admin/Tech field, but you can modify it if needed. Enter the Description of the problem and a detailed description in the Problem textbox. Once everything is filled out, click the "Create" button. You will be returned to the main Incident page and the issue you submitted should be listed.



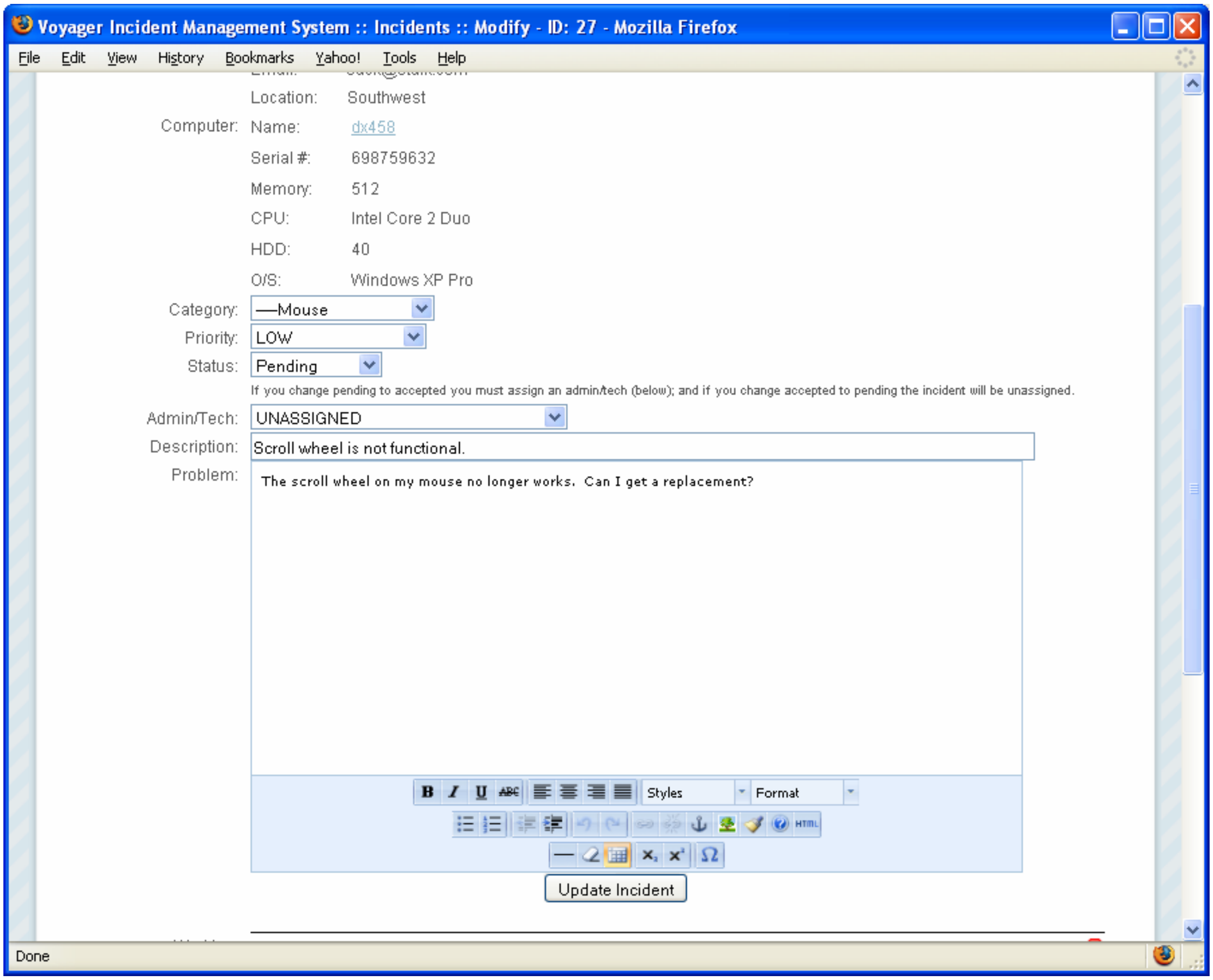
View a Incident

From the Incidents page, you can select to view a particular incident. To do so, click on the button beside the incident you wish to view. More details on the information will be listed. The creation and last modification date is displayed. The user who submitted the call and their information (Network Port, Email, Location, and Computer) is listed. The related call information (Category, Priority, Status, Admin/Tech, Description, and Problem) is then displayed. If there are any Worklogs associated with the incident, they are listed on the bottom.

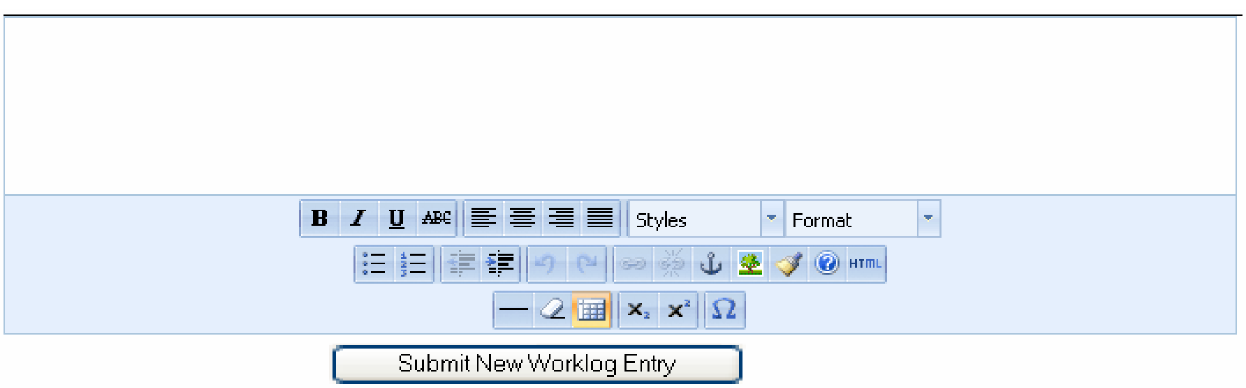


Edit a Incident

To edit an incident, click on the Modify button. This will allow you to modify some fields, such as Category, Priority, Status, Admin/Tech, Description, and Problem. This allows you to change the Status of the incident or to modify any information related to the incident. Once you are finished, click the "Update Incident" Button. You can access this page by clicking on the button on the Incidents page.



Below the Edit Incident is an area where you can submit a New Worklog. Type in the information you wish to add and click on "Submit New Worklog Entry".

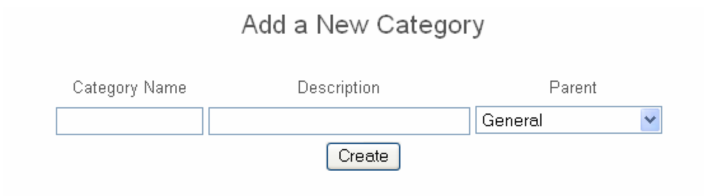


Categories

Categories are used for better grouping of incidents. Categories are customizable. To access the Categories page to manage them, click on the Manage Categories button on the Incidents page. The Categories page is broken up into three areas. In the area on the top you can add new categories. In the area in the middle, you can update or disable categories. On the bottom of the page, you can update or enable categories.

Add a New Category

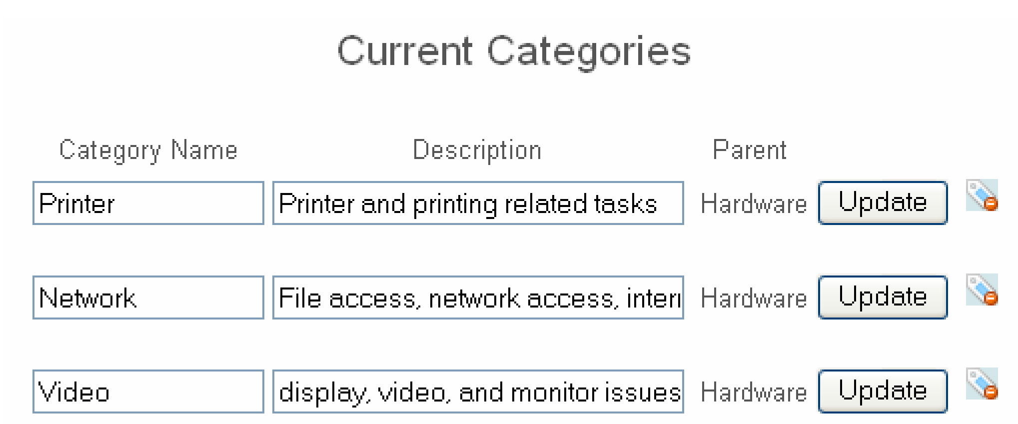
To add a new category, enter the Category Name, enter the Description, and select the Parent category. Then click on the "Create" button to create the new category.

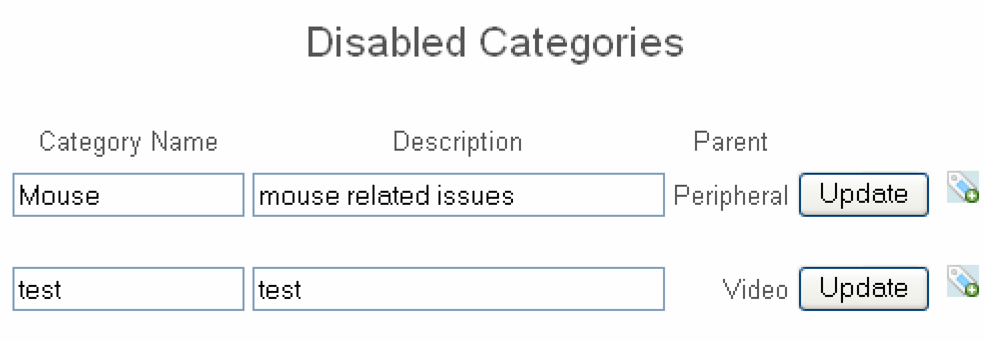


Change a Existing Category

On the bottom half of the Categories page, your current Categories are listed. You can make updates to the categories here. Change the information you wish to modify and click the "Update" button.

You can disable categories by clicking the button.
You can re-enable categories by clicking the button.



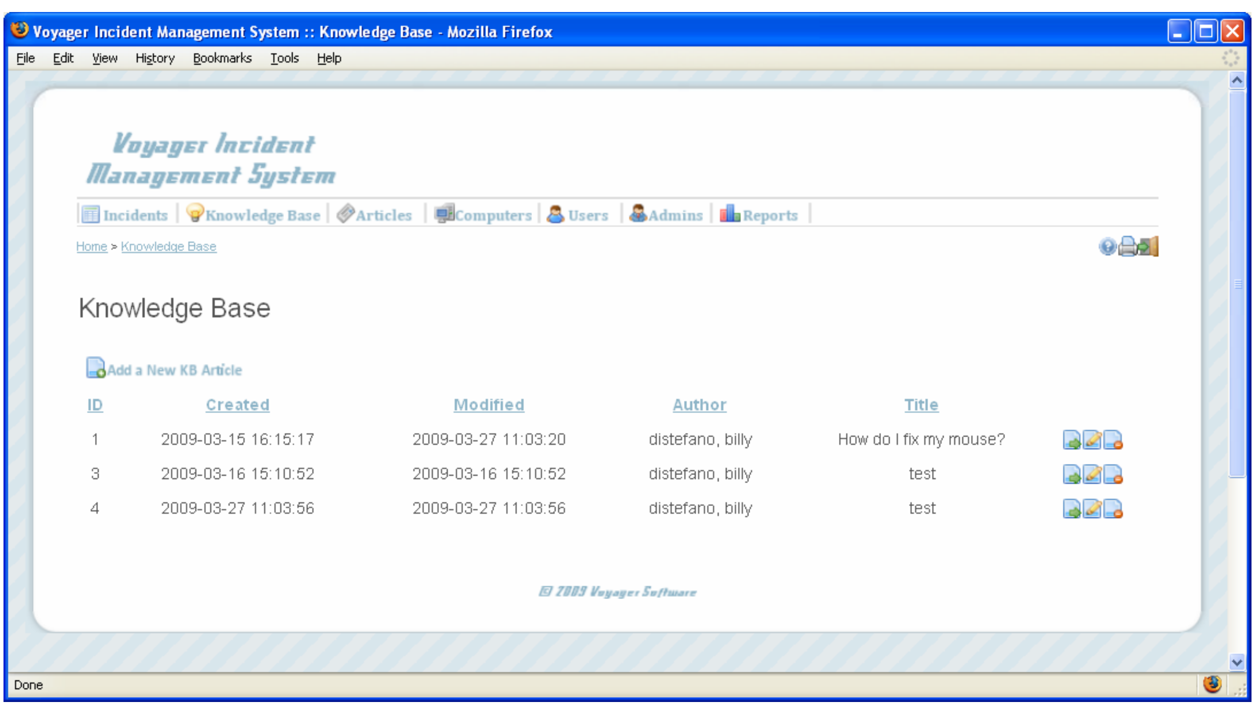


Knowledge Base

The Knowledge Base is a library where you can store common questions or common incidents users can resolve on their own. If used effectively, the Knowledge Base can lower your incident numbers. You can enter tutorials for core systems or step by step solutions to promote the resolution of questions and issues without the involvement of the Information Technology Department. Only System Administrators and Technicians have access to add new Knowledge Base Articles.

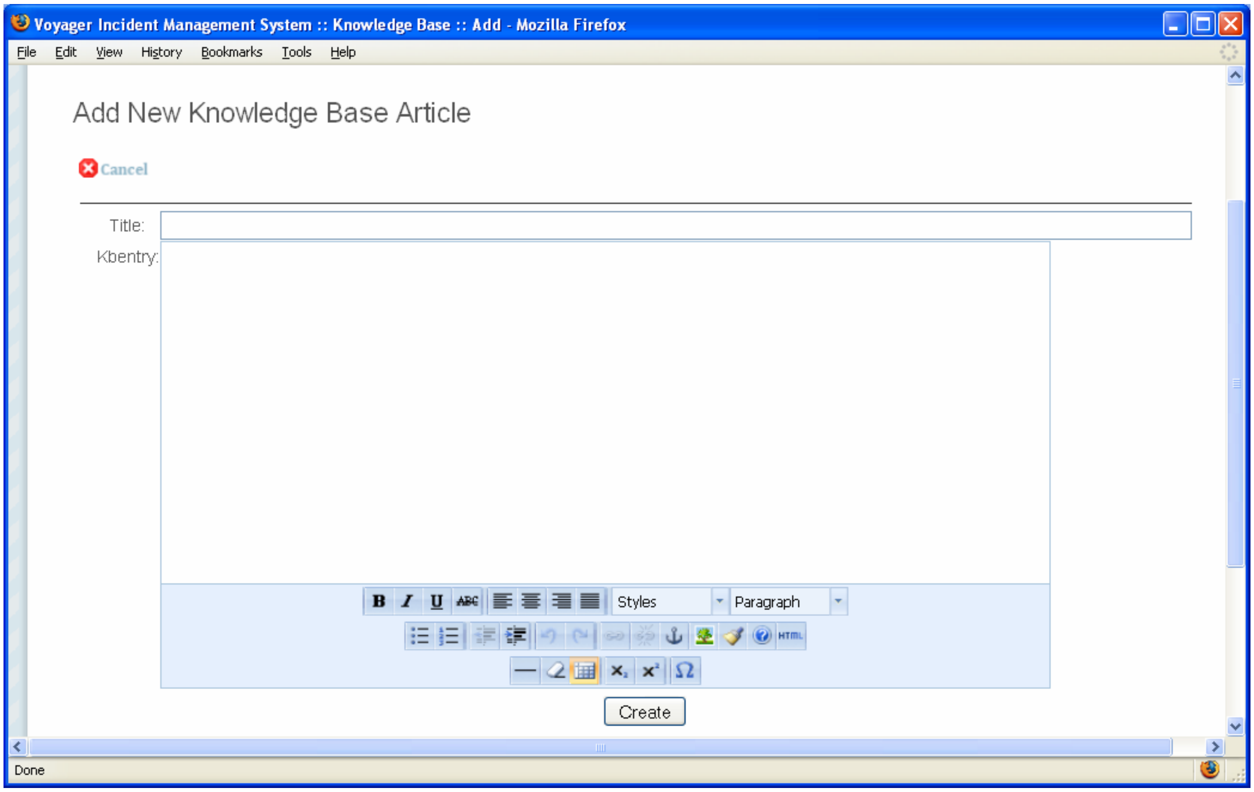
On the main Knowledge Base page, the Knowledge Base Article Information is displayed for each entry. The ID, Creation Date, Modified Date, Author, and Title of the article are displayed. Each entry also has three buttons. Each of these action buttons will be explained later.

View Knowledge Base Article
Edit Knowledge Base Article
Delete Knowledge Base Article



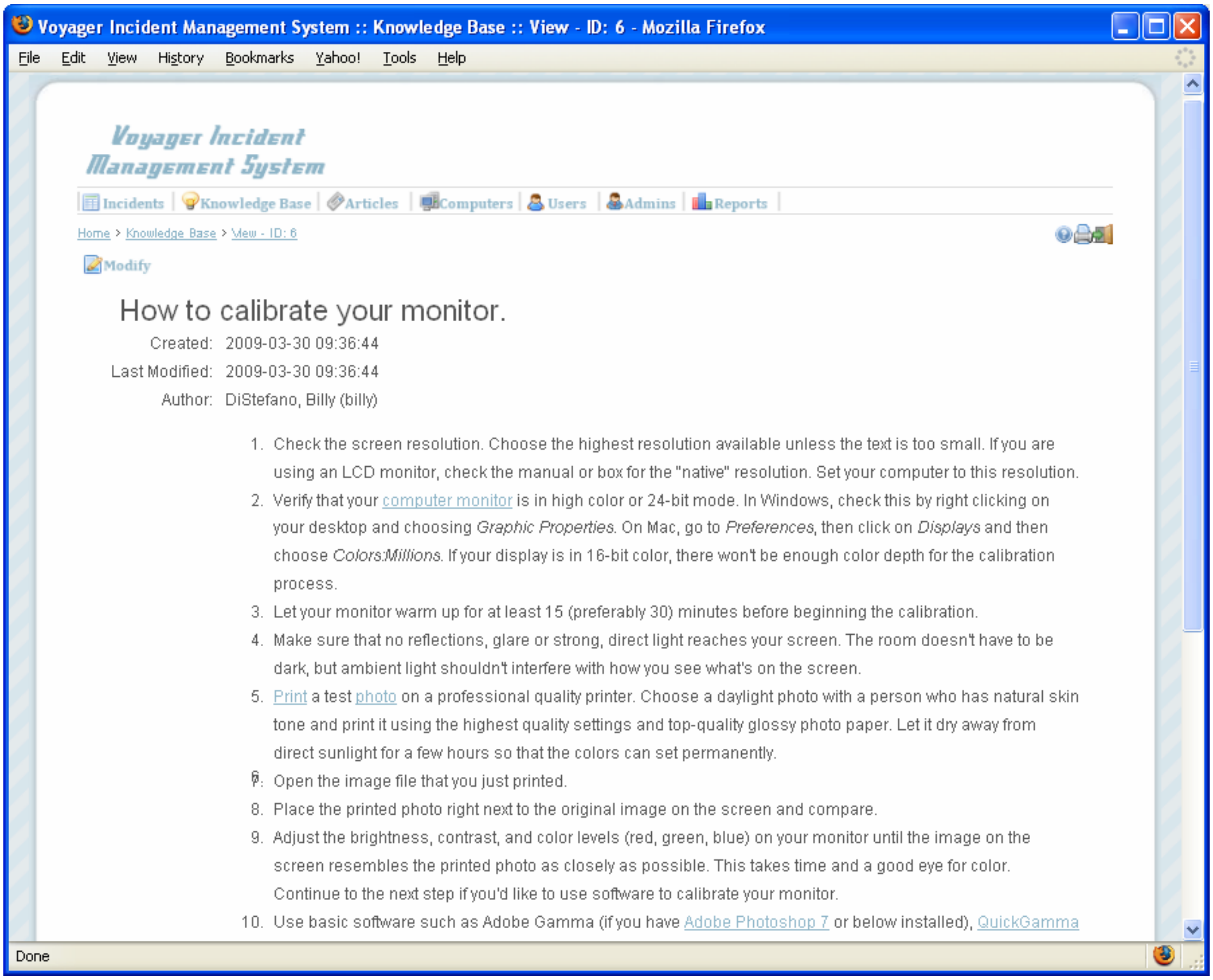
Add a New Knowledge Base Article

To add a new Knowledge Base Article, click on the Add a New KB Article button. You will be prompted to enter the Title and Contents for the Article. Once you are finished entering the information, click “Create”. The KnowledgeBase page will appear and your entry should be listed.



View Knowledge Base Article

To view a Knowledge Base Article, click on the button. Information on the Creation Date, Last Modified Date, Author, Title, and Article Content is displayed.

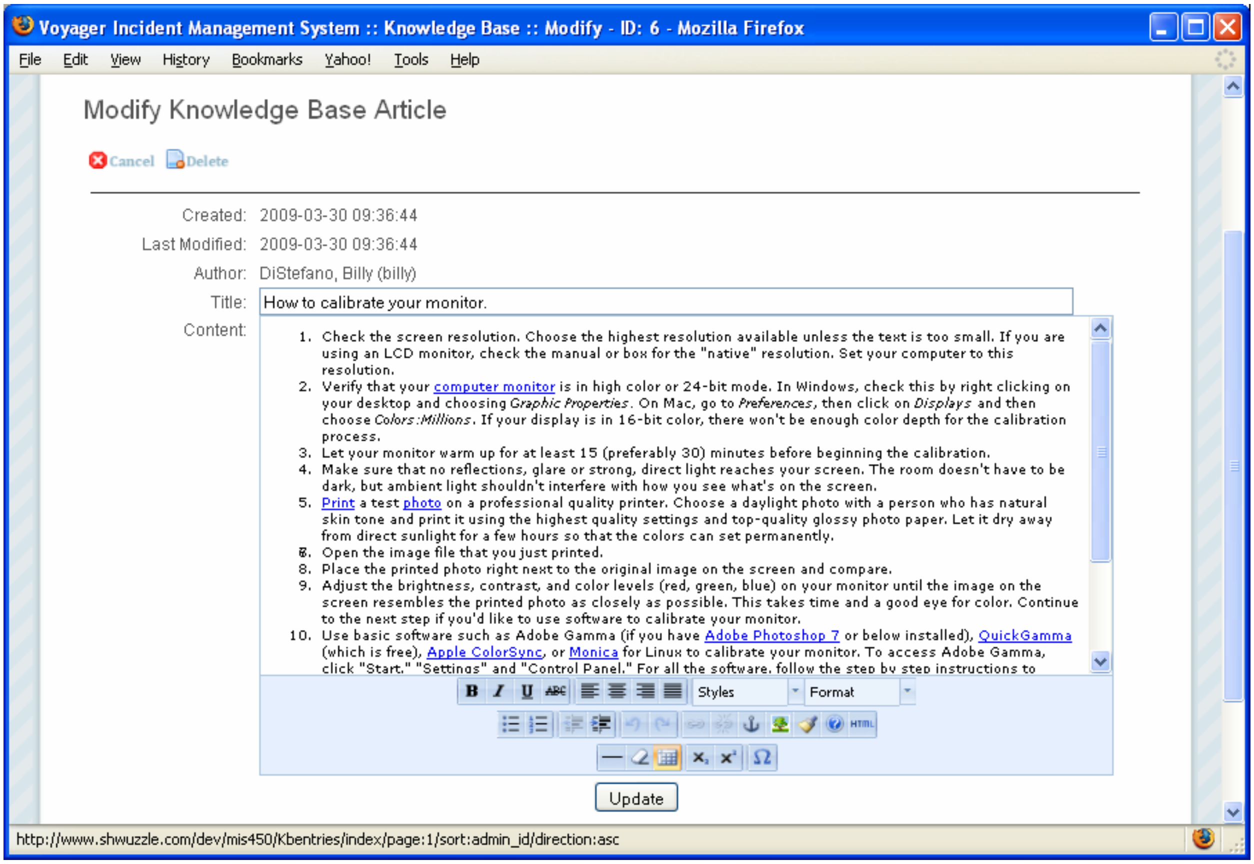


Modify Knowledge Base Article

To modify a Knowledge Base Article, click on Modify in the View Knowledge Base Article Page. The Title and Content will be available for modification. Once you are finished with your modification, click on the "Update" button. You will be returned to the main Knowledge Base page.

Note:

- From this page you can delete an Article by clicking the Delete button.
- You can also access the Edit Knowledge Base Article page by clicking the button on the main Knowledge Base page.



Delete Knowledge Base Article

You can delete Knowledge Base Articles if they become obsolete or no longer useful. Once the Knowledge Base Article is deleted, they cannot be restored. There are two methods to delete a Knowledge Base Article.

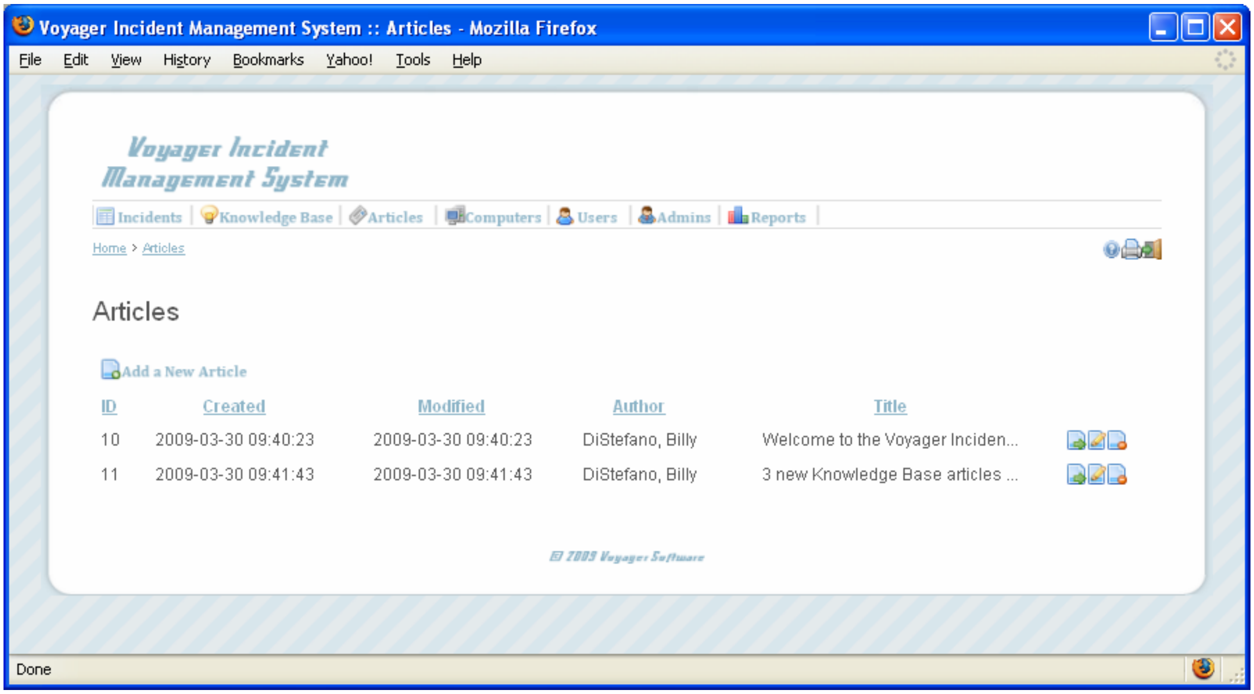
1. On the Main Knowledge Base page, click on the button.
2. On the Edit Knowledge Base Article page, click on the Delete button.

Articles

Articles are News Articles the users see when they first log into the system. Articles are a good way to communicate any changes that may affect the end user or to communicate a known problem to end users. It would be easier to create a Article acknowledging that a core system is down than to receive x number of incidents regarding the core system failure. Articles are similar to Knowledge Base Articles, the only different being the information that they store. Management of Articles is only accessible to Administrators of the system.

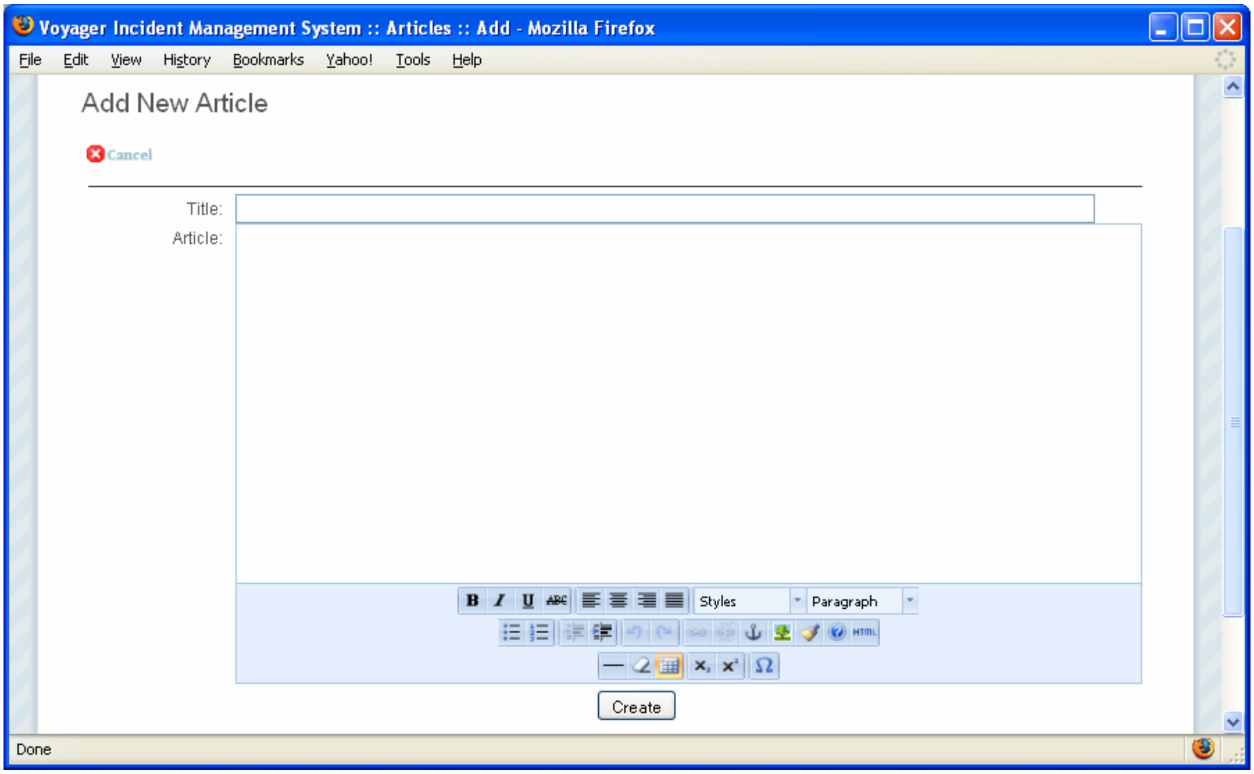
On the main Articles page, the Article Information is displayed for each entry. The ID, Creation Date, Modified Date, Author, and Title of the article are displayed. Each Entry also has three buttons. Each of these action buttons will be explained later.

View Article
Edit Article
Delete Article



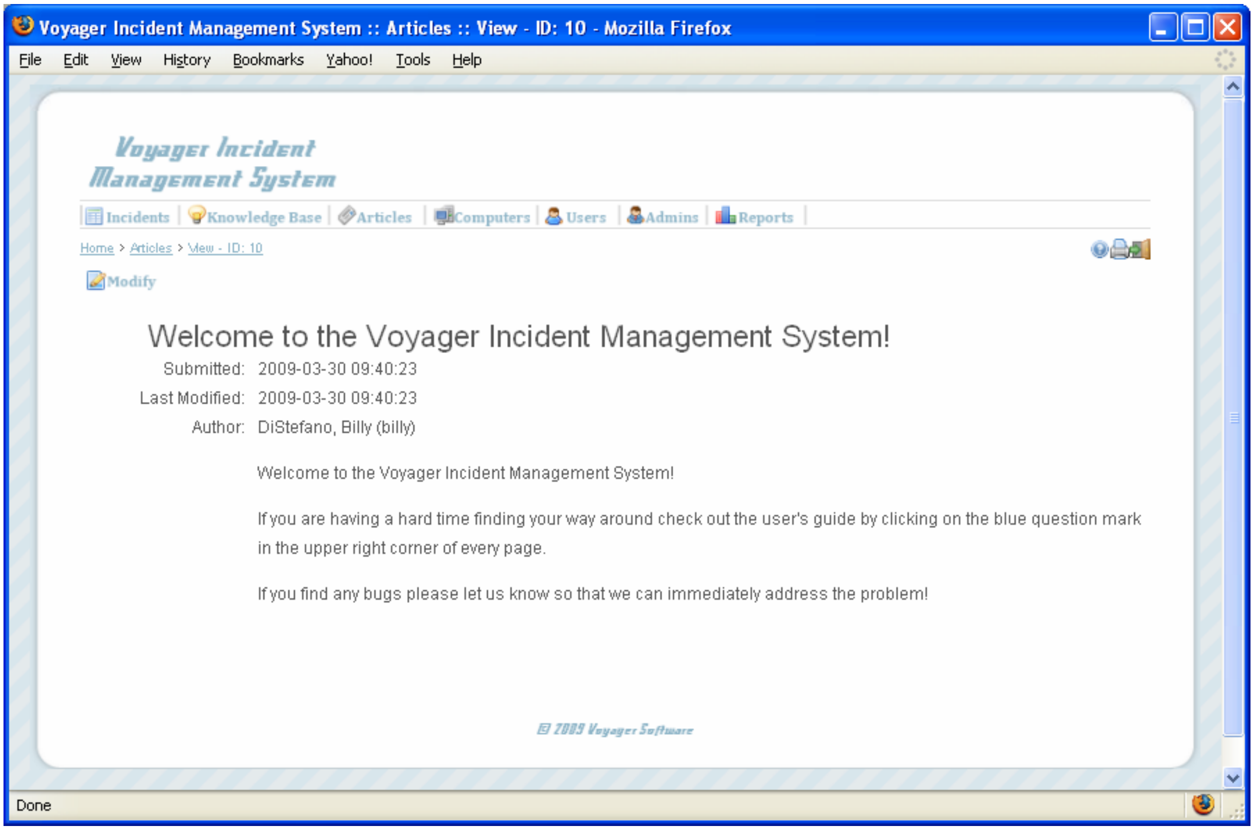
Add a New Article

To add a new Article, click on the Add a New Article button. You will be prompted to enter the Title and Contents for the Article. Once you are finished entering the information, click "Create". The Article page will appear and your entry will be listed.



View Article

To view an Article, click on the  button. Information on the Creation Date, Last Modified Date, Author, Title, and Article Content is displayed.

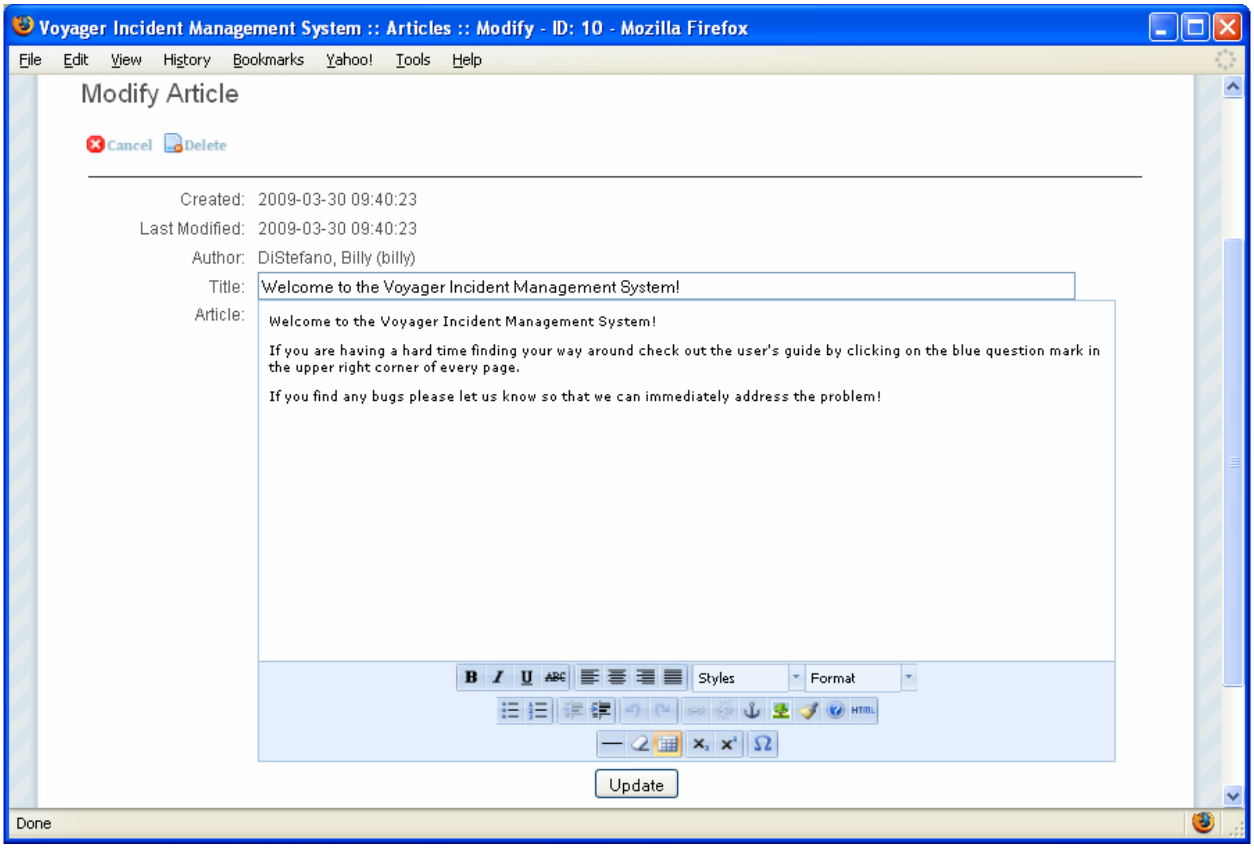


Modify Article

To modify an Article, click on Modify in the Article Page. The Title and Content will be available for modification. Once you are finished with your modification, click on the "Update" button. You will be returned to the main Articles page.

Note:

- From this page you can delete an Article by clicking the Delete button.
- You can also access the Edit Article page by clicking the button on the main Knowledge Base page.



Delete Article

You can delete Articles if they become old or no longer useful. Once the Article is deleted, they cannot be restored. There are two methods to delete a Article.

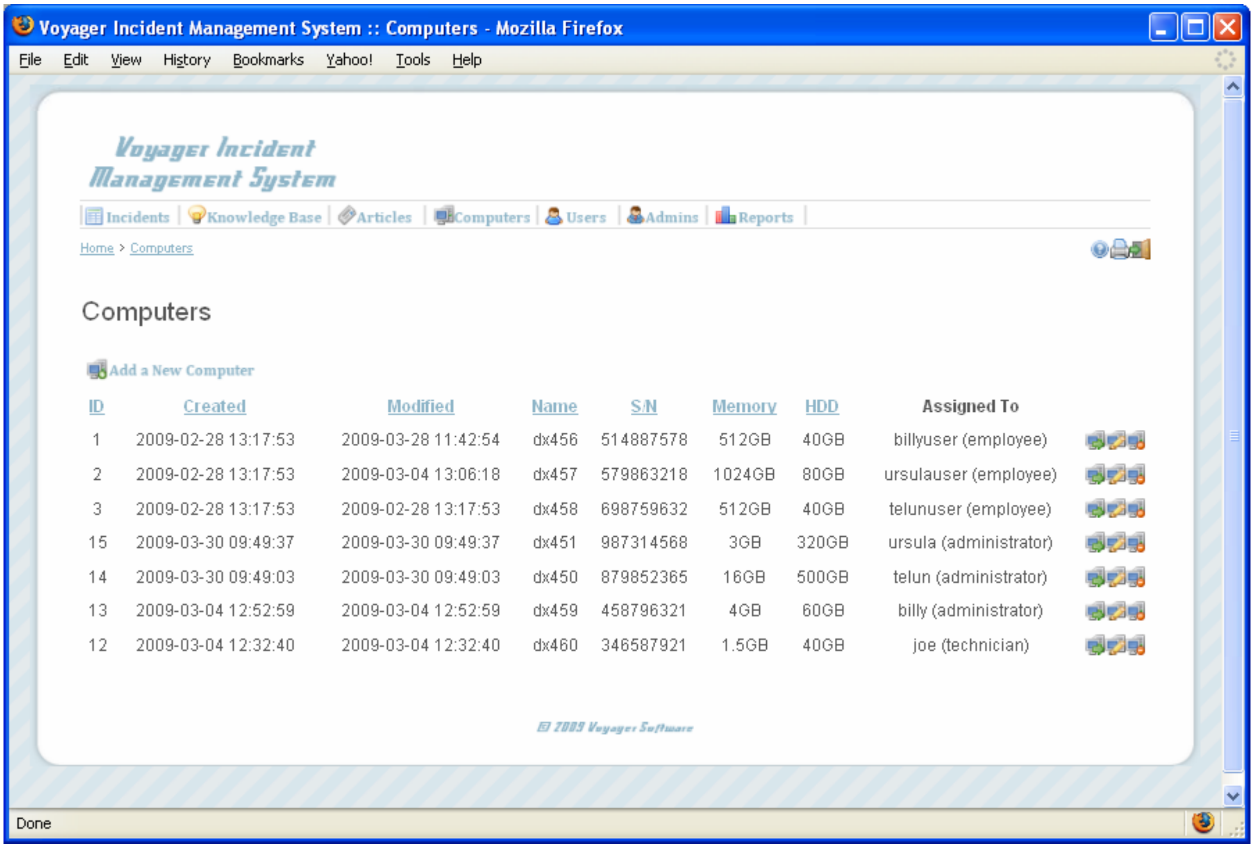
1. On the Main Articles page, click on the button.
2. On the Edit Article page, click on the Delete button.

Computers

The Computers component of the system is an asset management system. This component allows you to keep track of all computers. Computers can be assigned to their primary users. Computers can only be assigned to one person, but do not need to be assigned.

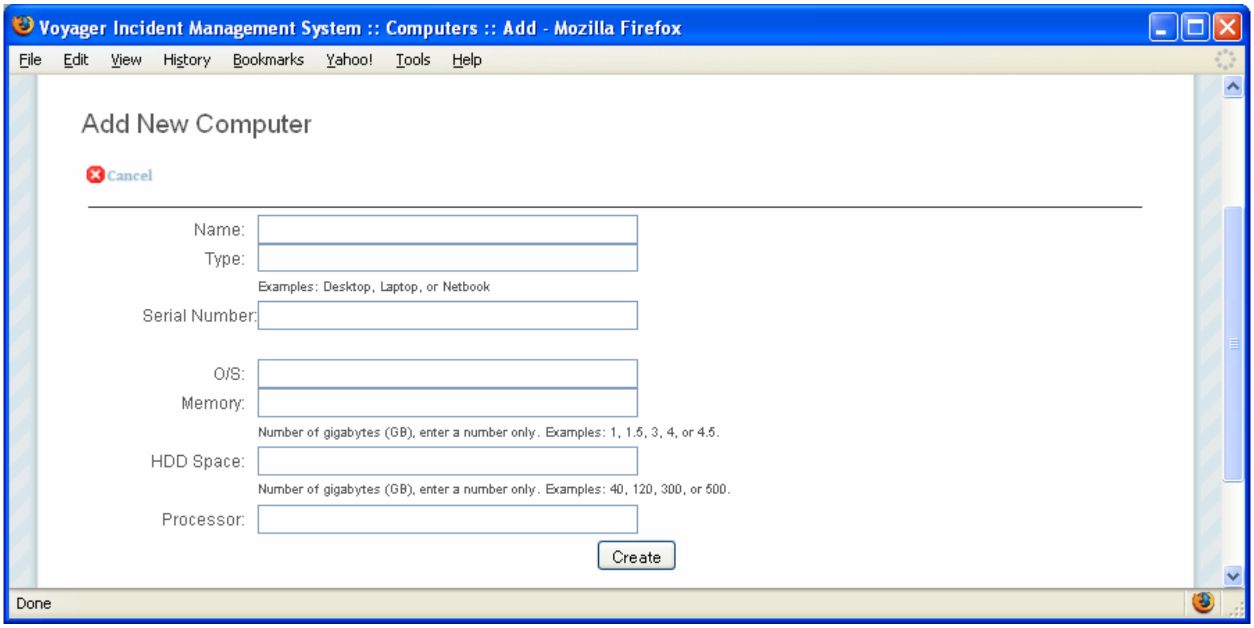
The main Computers page displays the computer ID, Creation Date, Modified Date, Computer Name, Serial Number, Memory, Hard Drive Space, and who the Computer is assigned to.

View Computer
Edit Computer
Delete Computer



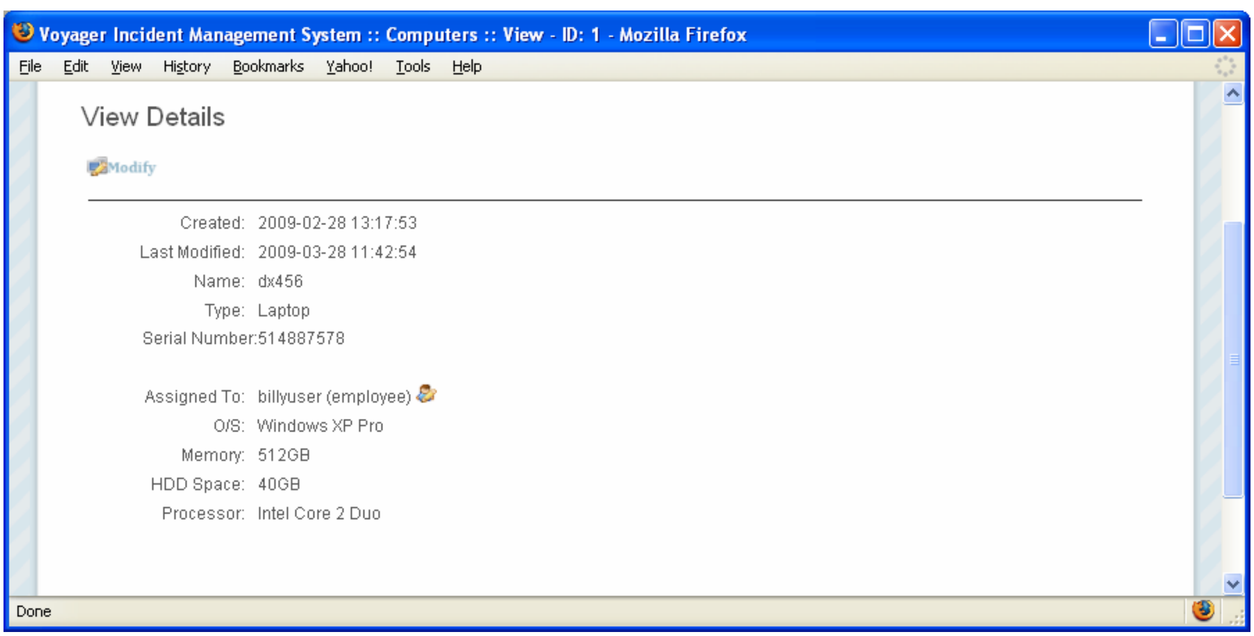
Add a New Computer

To add a new computer, click on the Add a New Computer button. You will be prompted for the Name of the computer, its Type, Serial Number, Operating System, Memory Hard Drive Space, and Processor. The Memory and Hard Drive Space must be entered in Gigabytes. After you are finished, click the “Create” button. You will be returned to the main Computers page and the new computer should be listed.



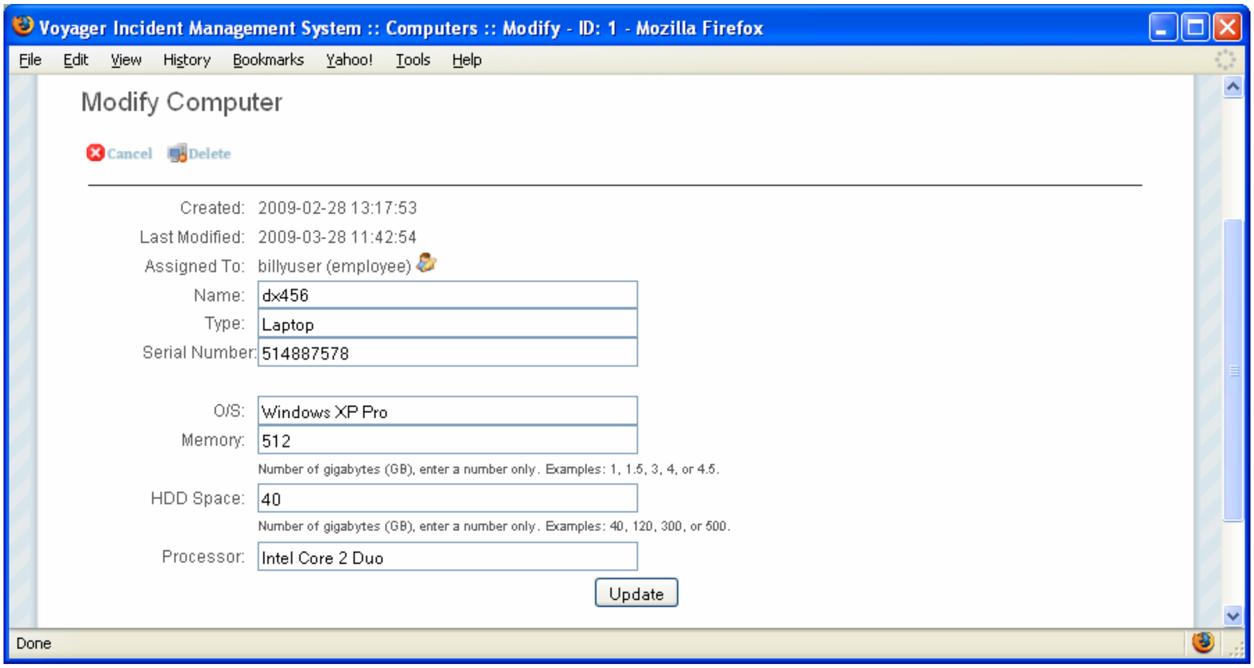
View a Computer

To view a computer, click on the button. Details on the computer will be displayed. The Creation Date, Last Modified Date, Computer Name, Type, Serial Number, Assigned To, Operating System, Memory, Hard Drive Space, and Processor will be displayed.



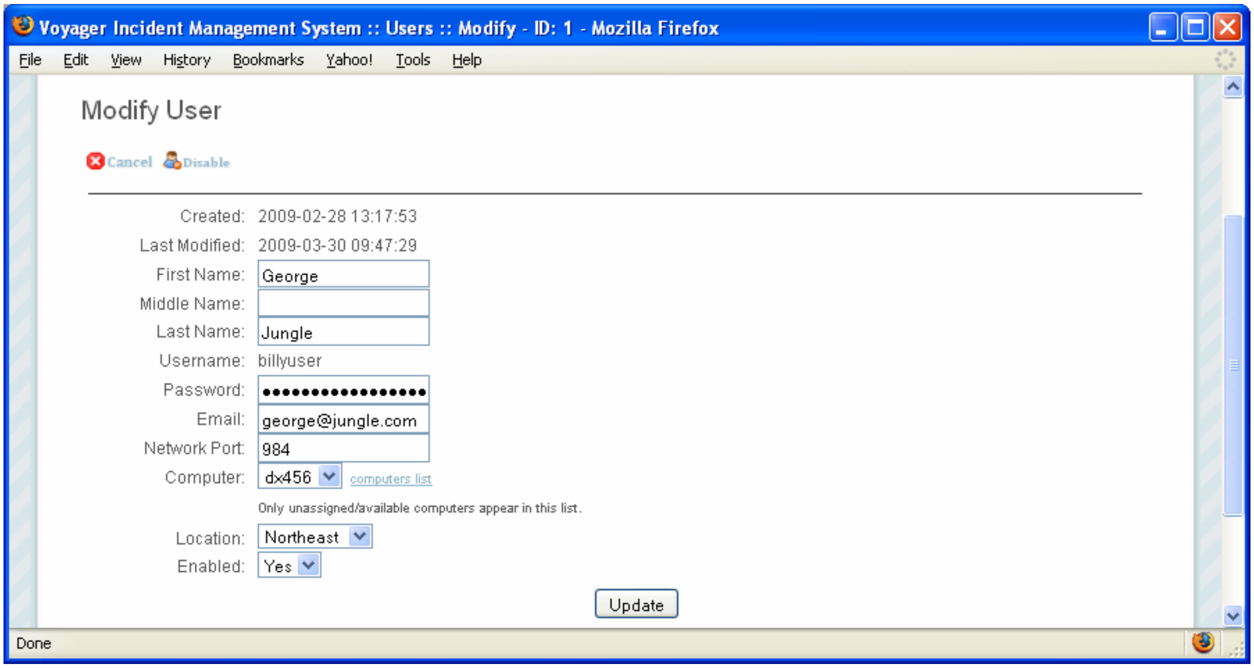
Modify a Computer

To modify a computer, click on the Modify button on the View Computer page or click on the button on the main Computers page. This will allow you to modify the Computer Name, Type, Serial Number, Operating System, Memory, Hard Drive Space, and Processor. Once you are finished updating the computer, click on “Update”. You will be returned to the main Computers page.



Reassign a Computer to a Person

To reassign a computer to a person, click on the button located on the View Computer page or the Edit Computer page. This will take you to the Modify User page where you can change the Computer’s assignment or the user information who the computer is assigned to.



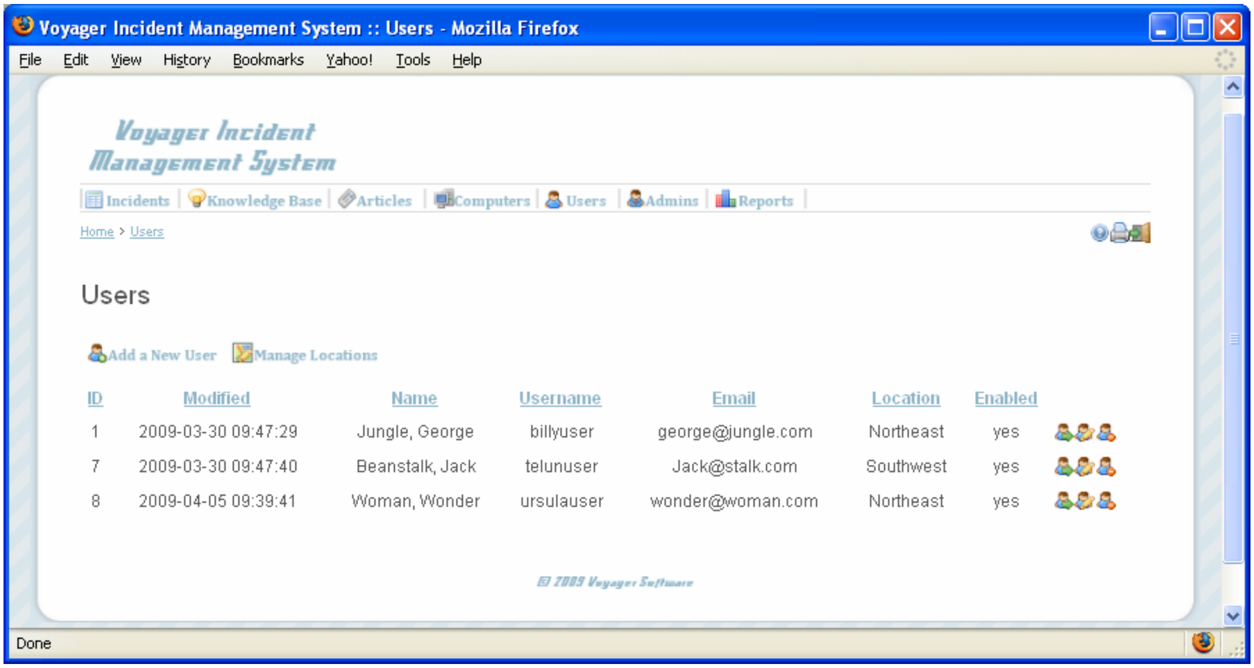
Delete Computer

To delete a computer, click on the button located on the main Computers page. You can also click on the Delete button located on the Modify Computer page. Once you delete a computer, you cannot restore it.

Users

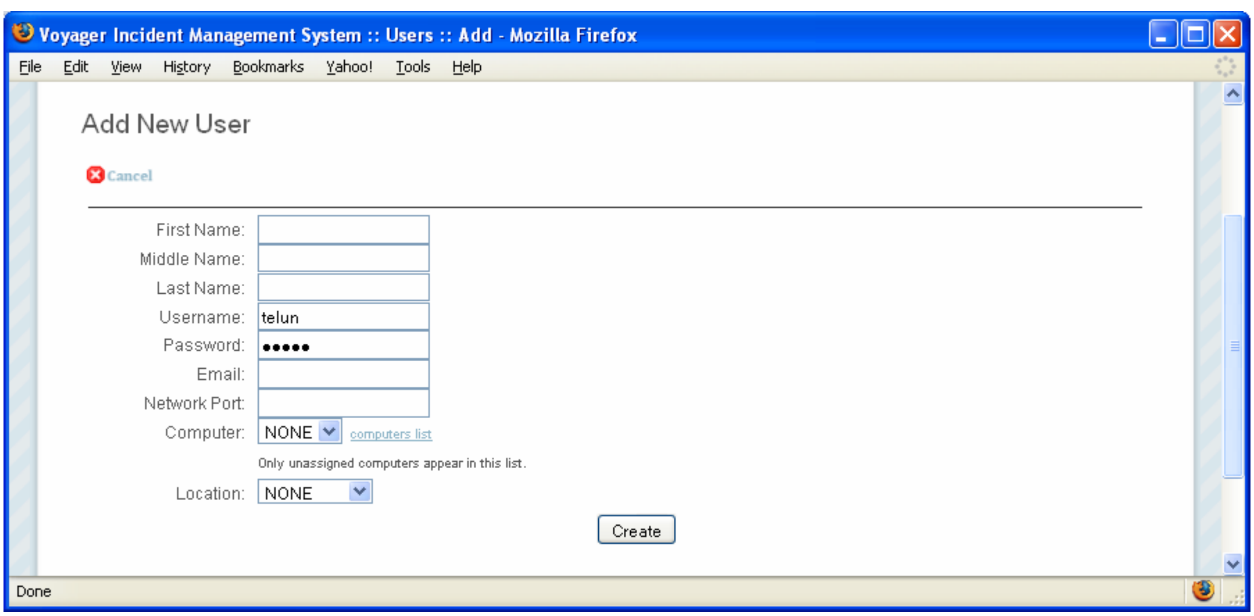
Users are the users who will be using the system to report problems. Only System Administrators have access to manage the Users. The main page displays high level information on the users. The User ID, Modified Date, Name, Username, Email Address, Location, and Enabled button is listed. Each entry has three buttons associated to them. They will be discussed in further detail.

View User
Edit User
Enable/Disable User



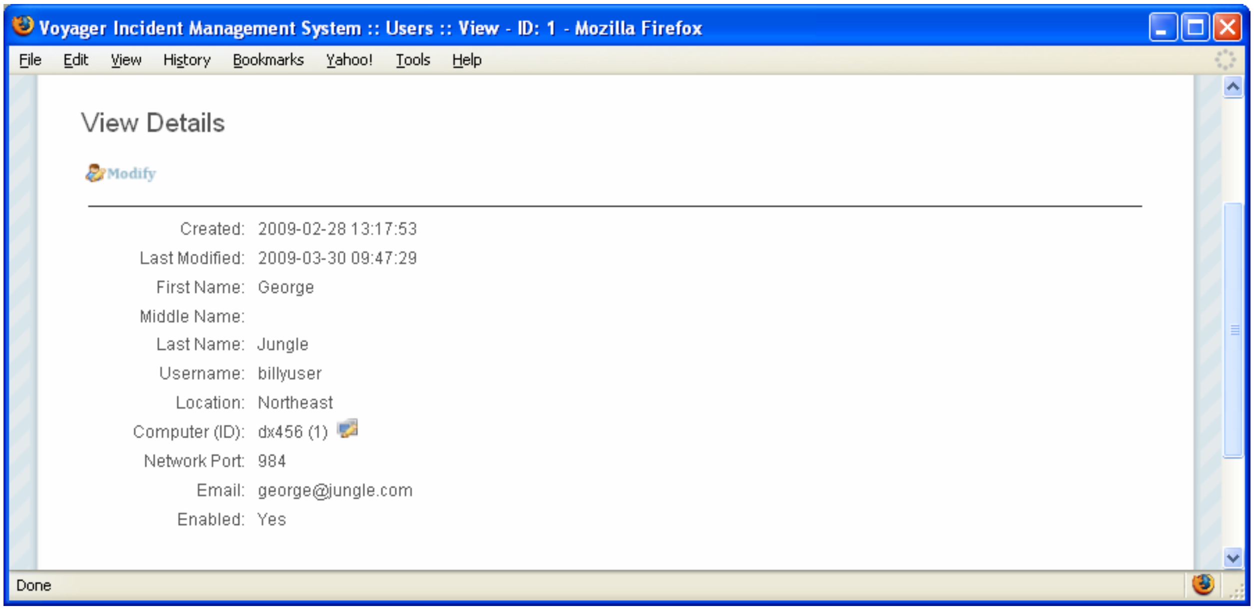
Add User

To add a new user, click on the Add a New User button. You will be prompted for their name, Username, Password, Email, Network Port, Computer, and Location. The Network Port, Computer, and Location fields are not required fields. Click the "Create" button when the form has been completed. You will be returned to the main Users page.



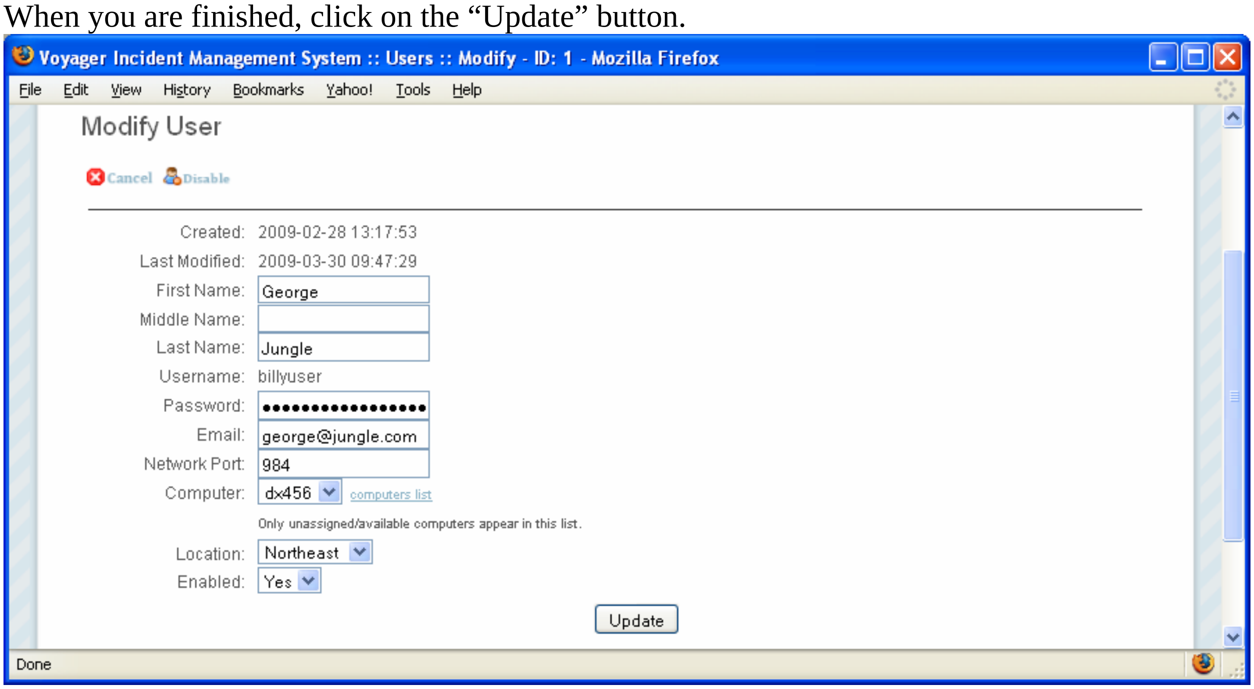
View User

To view a user, click on the button located on the main Users page. The User Creation Date, Last Modified Date, First name, Middle name, Last name, Username, Location, Computer (ID), Network Port, Email, and Enabled will be displayed.



Modify User

To modify a user, click on the Modify button. It will allow you to modify the First name, Middle name, Last name, Password, Email, Network Port, Computer, Location, and Enabled. When you are finished, click on the "Update" button.



Disable/Enable User

This allows you to disable or enable users. Users who are disabled will remain on the Users list. When you are on the Modify User page, you will be able to Disable or Enable a user by clicking on the Disable or Enable button. You can also use the Enabled dropdown box on the Modify User page to modify the Enabled status. You can also quickly Disable or Enable Users on the main Users page by clicking the Enable button or Disable button.

Manage Locations

Locations are used to see where a user is located. New locations can be added and existing ones can be edited by accessing the Locations page. Click on the Manage Locations button to manage your locations.

Add Location

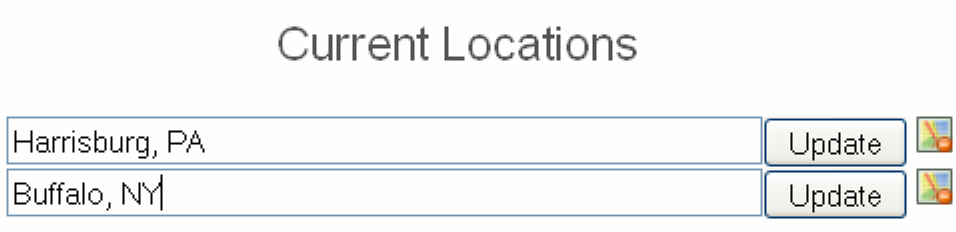
The top part of the Manage Locations page allows you to enter a new location. Enter the new location in the textbox and click on the "Create" button.

Update Existing Location

The bottom part of the Manage Locations page allows you to modify existing locations. Change the text of the location you wish to modify and click "Update".

Delete Location

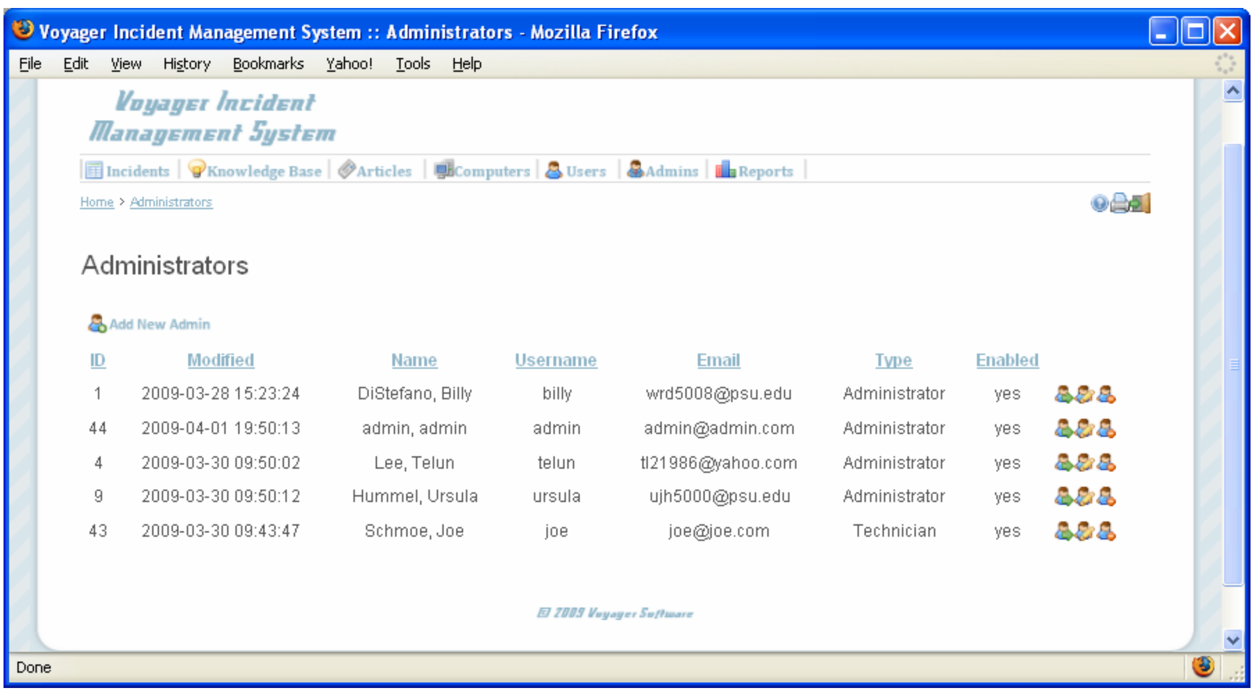
To delete a location, click on the button located beside the location you wish to delete.



Admins

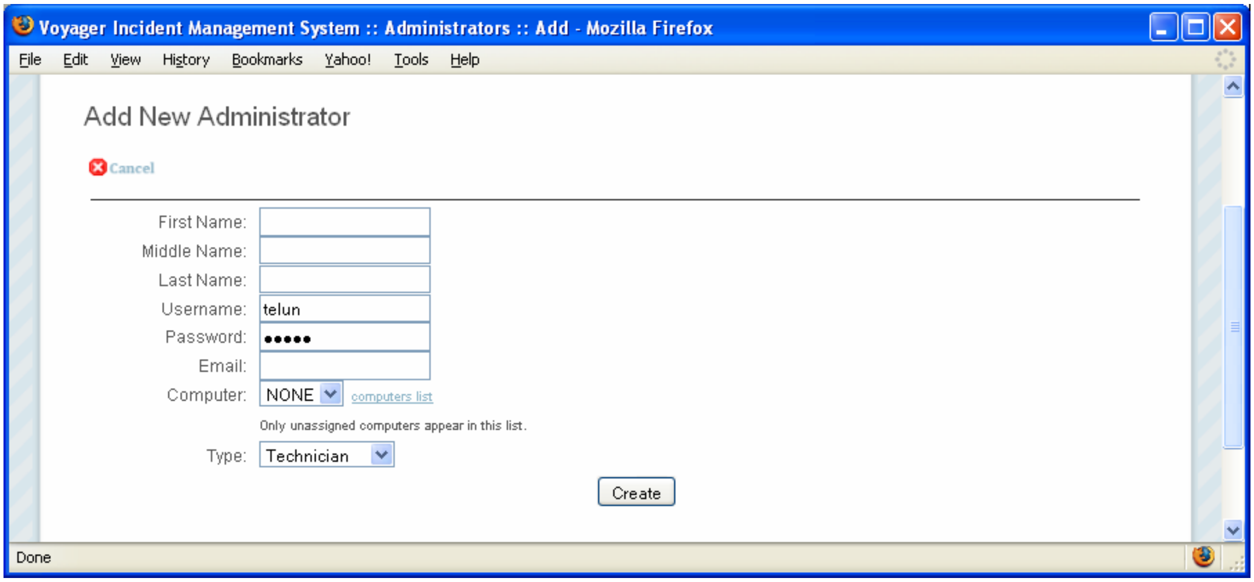
The Admins section will allow you to manage the Technicians and Administrators of the system. Only Administrators have access to manage admins. The main page displays high level information on the Admins. The Admin ID, Modified Date, Name, Username, Email Address, Type, and Enabled button is listed. Each entry has three buttons associated to them. They will be discussed in further detail.

View Admin
Edit Admin
Enable/Disable Admin



Add Admin

To add a new admin, click on the Add New Admin button. You will be prompted for their Name, Username, Password, Email, Computer, and Type. The type is where you select between a Technician and an Administrator. Click the "Create" button when the form has been completed. You will be returned to the main Admins page and your new admin account should be listed.



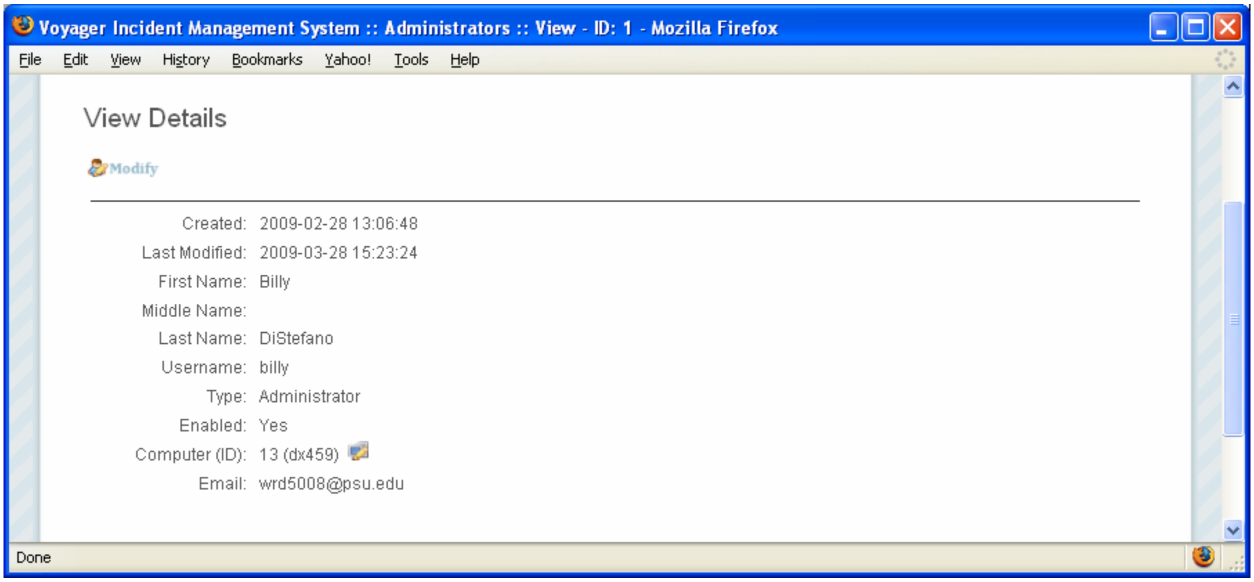
IMPORTANT: Difference between an Administrator and a Technician

An Administrator has access to manage everything in the system. This includes the Incidents page, Knowledge Base, Articles, Computers, Users, Admins, Reports, Locations, and Categories. Administrators will have access to manage other Admins, so make sure the access is given to a select number of people.

A Technician only has access to manage the Incidents and Knowledge Base. They can also view Articles, but cannot manage them. A Technician has a lot less rights than the Administrator. Use Technician as the type for people whose responsibility is to resolve incidents reported by users.

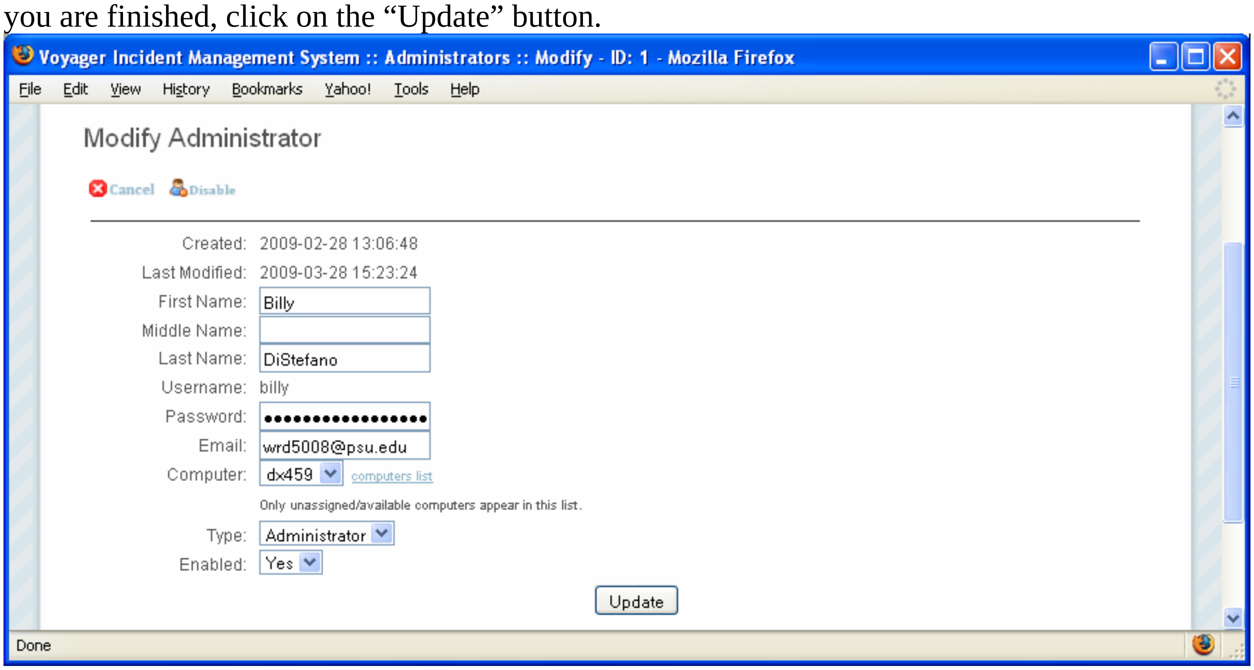
View Admin

To view a Admin, click on the button located on the main Admins page. The User Creation Date, Last Modified Date, First name, Middle name, Last name, Username, Type, Enabled, Computer (ID), and Email will be displayed.



Modify Admin

To modify an Admin, click on the Modify button. It will allow you to modify the First name, Middle name, Last name, Password, Email, Network Port, Computer, Type, and Enabled. When you are finished, click on the "Update" button.



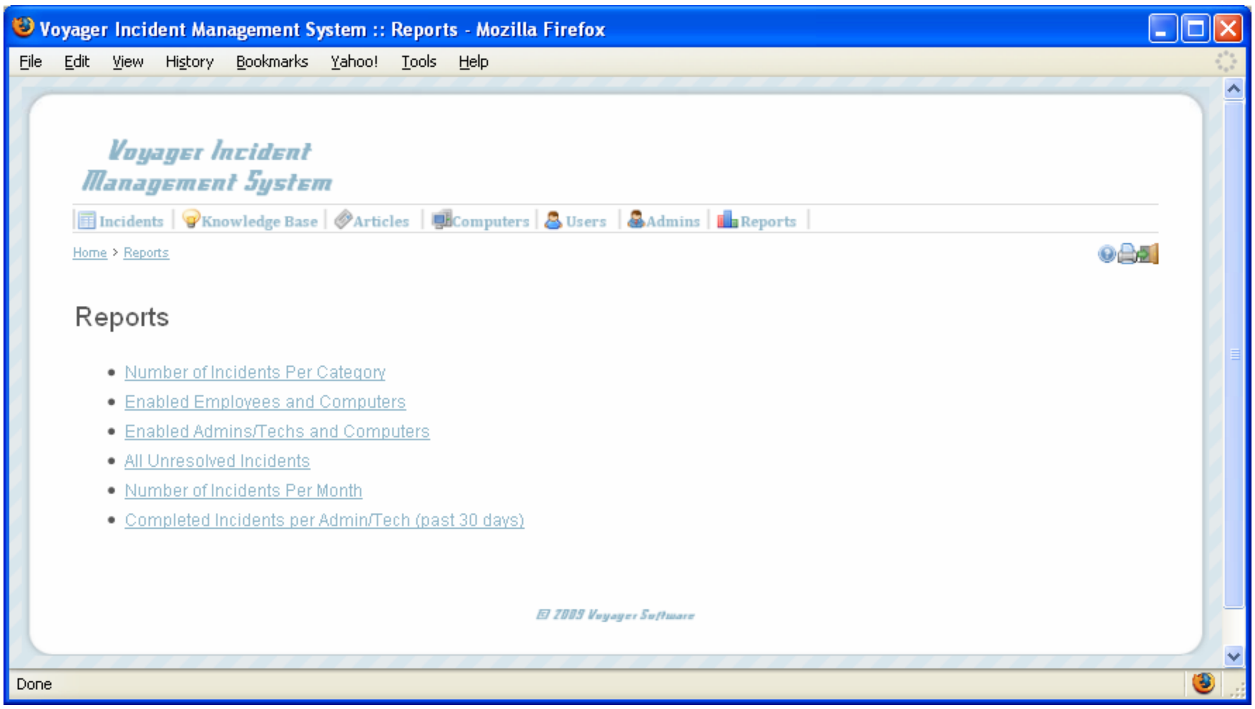
Disable/Enable Admin

This allows you to disable or enable Admins. Admins who are disabled will remain on the Admins list.

When you are on the Modify Admins page, you will be able to Disable or Enable an Admin by clicking on the Disable or Enable button. You can also use the Enabled dropdown box on the Modify Admin page to modify the Enabled status. You can also quickly Disable or Enable Admins on the main Admins page by clicking the Enable button or Disable button.

Reports

The Reports page contains some default reports that can be run.



Number of Incidents Per Category

This report counts all of the incidents for a category and generates a report that lists the most frequently occurring category for incidents. This may be useful in finding out where most of the resources are used to resolve incidents.

Enabled Employees and Computers

This report displays all employees who are enabled and their assigned computer.

Enabled Admins/Techs and Computers

This report displays all administrators and technicians who are enabled and their assigned computer.

All Unresolved Incidents

This report displays all unresolved incidents. This is a useful report for System Administrators to use to follow up on open incidents.

Number of Incidents Per Month

This report displays the number of incidents received per month. The report may be useful in benchmarking Knowledge Base Entries. As the use of the Knowledge Base increases, the incidents should decrease.

Completed Incidents per Admin/Tech (past 30 days)

This report displays all incidents that each System Administrators and Technicians closed.

Textbox Toolbar

The textbox is available in several different components of the system. This toolbar allows you to format text within the textbox. The buttons located in the textbox and their functions are described below.

- Bold
- Italic
- Underline
- Strikethrough
- Left Align
- Center
- Right Align
- Wrap?
- Styles — Does not work
- Format — Format
- Bullet
- Number
- Left Tab
- Right Tab
- Undo
- Redo
- Add Hyperlink
- Remove Hyperlink
- Anchor
- Insert Picture
- Clean Up Messy Code
- About Button
- HTML Editor
- Horizontal Line
- Remove Formatting
- Toggle Visible/Invisible Elements
- Add Subscript
- Add Superscript
- Insert Custom Character