Chapter 6 Work Tickets

The previous chapter discussed the LSC setup and administrative procedures. This chapter describes the procedures for creating and maintaining work tickets.

Introduction

A work ticket is a collection of related information regarding an event. The "event" is the incident for which information is maintained and tracked. Tickets can track virtually any number of event types. Consider creating tickets for any of the following events:

- ❑ Support requests and issues
- ❑ Installation scheduling
- ❑ Training sessions
- ❑ Enhancement or upgrade requests

This chapter discusses the procedures for creating and maintaining work tickets. Throughout the chapter, examples are used to illustrate methods for tracking various event types.

What's in this Chapter

The following chart describes the sections in this chapter:

SECTION	DESCRIPTION
Creating Tickets	Provides procedures for creating, deleting and printing tickets.
Maintaining Ticket Information	Provides procedures for managing associated ticket action and contact detail information. Also discusses the procedures for cross-referencing tickets and editing date field entries.
Investigating	Provides procedures for accessing other McAfee products from within LSC for investigative and problem resolution purposes.

Creating Tickets

The process of creating tickets is the essence of LSC. All information maintained and tracked by LSC is done so via a ticket.

Depending on the responsibilities assigned to your support staff and the flow of information within your organization, one staff member or all staff members might create tickets. For example, Mike answers phones for the support desk staff at the Blue Ribbon company. For each incoming phone call, Mike creates a ticket with the caller's information and problem. Throughout the day, the support desk supervisor assigns the tickets to specific staff members. The staff members are responsible for handling the tickets they have been assigned.

Ticket Window Fields

All information regarding an "event" is entered into a Ticket window. An "event" is defined as the item being tracked by LSC. For example, an event might be a support call or it might be a scheduled installation. A Ticket window is illustrated in Figure 6-1.

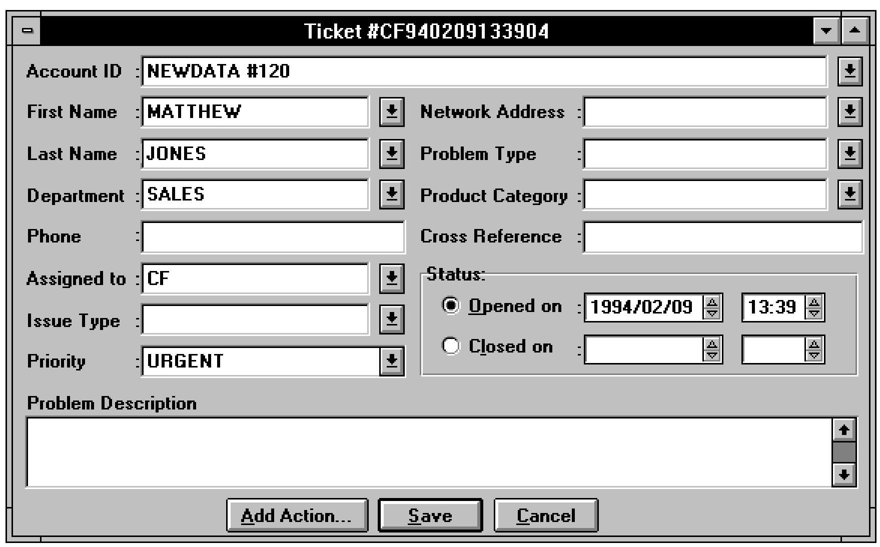

Figure 6-1: A Ticket Window

When a new ticket is created, LSC automatically assigns a number to the ticket. The ticket number displays in the title bar of the Ticket window and cannot be modified by the LSC user.

Each ticket number is determined by the following information: IIIYYMMDDHHMMSS, where III=staff initials, YY=year, MM=month, DD=day, HH=hour, MM=minute and SS=second. For example, the ticket number in Figure 6-1 indicates that this ticket was created on February 9, 1994 at 1:39:04 in the afternoon by the staff member that has the LSC login initials 'CF'.

Each field in the Ticket window is defined and discussed in the table below.

NOTES:

a - If your LSC database labels have been modified, the field names and definitions for your Ticket window may be different. For more information on labeling, refer to "Database Labeling" in Chapter 5.

b - Multiple Ticket windows can be open simultaneously.

Field	Description	Type
Account ID	The account to which this ticket belongs. Each Account ID must be unique. Every account has an associated First Name, Last Name, Phone, Department, Network Address and Company ID field. Entering an existing Account ID will automatically populate all associated fields. Account IDs can be set up directly from within the Ticket window or by choosing the Setup Account command from the Administration menu. Refer to "Accounts IDs" in Chapter 5 for detailed instructions on setting up accounts.	55 chars
First Name	The first name of the person/customer associated with the account entered in the Account ID field.	20 chars
Last Name	The last name of the person/customer associated with the account entered in the Account ID field.	20 chars
Department	The department of the person/customer associated with the account entered in the Account ID field.	30 chars
Phone	The phone number of the person/customer associated with the account entered in the Account ID field.	27 digits
Assigned To	The code/name of the LSC staff member assigned to handle the ticket. This field defaults to the initials supplied by the user who logged in to LSC.	3 chars

Continued...

Field	Description	Type
Issue Type	The code/name which indicates the type of ticket being issued.	10 chars
Priority	The priority assigned to the ticket. (The color display of each priority is as follows: Urgent=red; Important=pink; Necessary=green; Desired=brown.)	10 chars
Problem Type	The type of problem being reported. The item entered in this field determines the items that can be selected from the related Product Category drop-down list.	15 chars
Product Category	The category of the problem being reported. The entries available from this drop-down list are determined by the entry in the Problem Type field. For example, if DRIVE is entered as the Problem Type, then available product categories may be ANY MASS STORAGE DEVICE and DISK DRIVE A.	30 chars
Network Address	The network address of the person/customer associated with the account entered in the Account ID field.	20 digits + a colon (8 digits: 12 digits)
Cross Reference	Any information which can be used to cross reference the ticket to another item (e.g., another ticket or another application). Press the <ALT><Z> keys to paste the ticket number of the highlighted ticket in the View Tickets window into the active Ticket window's Cross Reference field.	15 alphanum
Status	Mutually exclusive radio buttons that indicate the status of the ticket. Each button is associated with a date and time field. By default, the current system date displays for the Opened On date. (Refer to the section on page 138 for procedures on editing date values.)	N/A
Problem Description	A detailed description of the problem which can be up to approximately 2 full pages of text.	4K

Many of the fields in the Ticket window have drop-down lists from which items can be selected. For example, choosing the Product Category field's drop-down list displays a list of entries that have been defined for the Product Category qualification list (refer to the partial Ticket window shown in Figure 6-2).

Clicking on an entry in the drop-down list places the chosen entry in the selected field.

Figure 6-2: The Product Category Drop-Down List

For those fields which have drop-down lists, typing in new entries adds the new entry to the associated qualification list. For example, if the name ACCOUNTING is not listed in the Department drop-down list, then entering the name ACCOUNTING into the Department field and saving the ticket will add the name to the Department qualification list.

NOTES:

a - Users are only able to type new entries in a Ticket window field if they are granted the appropriate rights in their staff member profile. Refer to "Staff Membership and Security" in Chapter 5 for instructions on setting up staff members and defining security rights.

b - Refer to "Qualification Lists" In Chapter 5 for a discussion on LSC's qualification lists.

The procedures for creating and maintaining tickets are discussed in this chapter.

Creating New Tickets

Inquiries, events and issues are tracked via a ticket number. To assign a ticket to a specific customer account, an account ID can be specified on the ticket. The steps required for creating new tickets involve entering information regarding the ticket's initial purpose. For example, when a customer requests support, a new ticket is created which documents the caller's account, name, company and phone information, as well as documents the caller's request.

The process of trying to solve the caller's problem is referred to as "action." Logging ticket action is discussed in the section of this chapter entitled "Maintaining Ticket Information."

NOTE:
New tickets are placed in the ticket database that is loaded at the time the new ticket is saved. To add the new tickets to the current LSC ticket database, make sure that the current database is being viewed (as opposed to the View Historical Tickets window).

Use the following procedure to create a new ticket.

1. **Choose the New Ticket command from the Ticket menu, or choose the New tool bar button.**

   The Ticket window displays, as in Figure 6-3. A ticket number is automatically assigned by LSC. It is indicated in the title bar of the Ticket window and represents the LSC login user initials, year, month, day, hour, minute, and second of the ticket's creation.

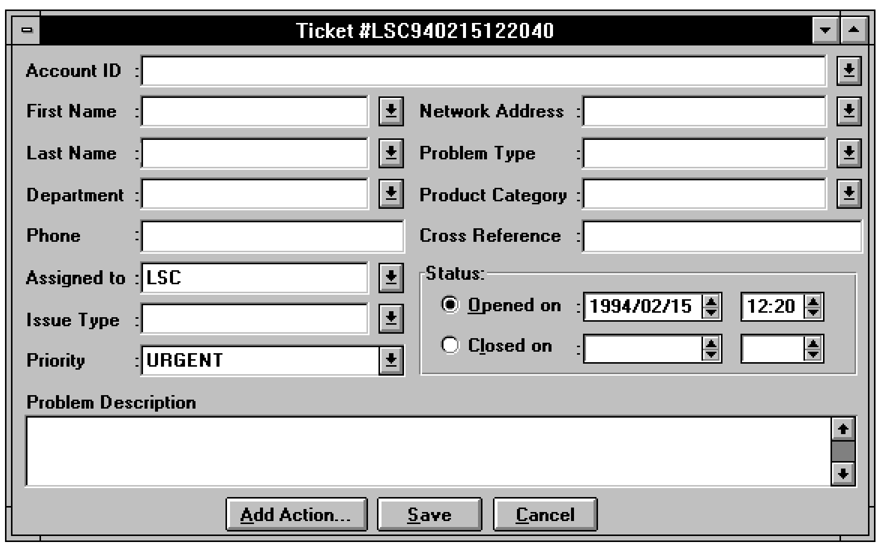

Figure 6-3: A New Ticket Window

2. **Enter the ticket information.**

   For detailed information on the Ticket window fields, refer to the table on page 124.

NOTES:

a - Selecting an Account ID from the drop-down list associated with this field will automatically enter the information defined for the account (i.e., First Name, Last Name, Department, Phone, and Network Address).

b - New accounts can be set up from within the Ticket window by typing in the new account information. Upon saving the ticket, the new account information is also saved.

c - Existing accounts can be updated from within the Ticket window by modifying the account information and saving the ticket. Upon saving the ticket, a prompt displays asking whether you want to update the account information. Answering Yes to this prompt will update the account data and all new tickets that are assigned to the account will reflect the updated information. Answering No will save the modified account data with this ticket only.

d - Ticket action can also be entered at this point by choosing the Add Action button. Refer to the procedure on page 131.

3. Choose the Save button.

If you have selected an account from the Account ID drop-down list and then modified the account data, a prompt displays asking whether you want to update the account information. Answering Yes to this prompt will update the account data. Answering No will save the modified account data with this ticket only.

The ticket is saved into the current ticket database.

Cross-Referencing Tickets

The Ticket window's Cross Reference field can be used to build a knowledge base of information regarding a specific issue or problem type. For example, new tickets can be cross-referenced to "TECHNICAL" Issue Type tickets which outline known problems and their solutions. Either from an LSC report or the View Tickets window, the LSC Administrator then has access to all tickets related to the specific Technical ticket that has ticket number 'x'. In this example, a report query can be created which includes only ticket number 'x', or a filter can be applied to the View Tickets window which only displays the tickets having ticket number 'x' in the Cross Reference field.

HINTS:

a - LSC's extensive short-cut keys facilitate the cross-referencing of tickets to one-another. Pressing the <ALT><Z> keys in a Ticket window will paste the ticket number of the highlighted ticket in the View Tickets window into the active Ticket window's Cross Reference field.

b - Use the Edit menu commands to cut, copy and paste information between open Ticket windows.

In addition to cross-referencing among LSC tickets, the Cross Reference field can be used to track information external to LSC. For example, if LSC tickets are created to track installations, entering a Purchase Order number in the Cross Reference field can track the PO number of each installed equipment component. This information might be useful in tracking equipment movement from purchase to installation, as well as assessing future equipment purchase requirements.

Deleting Tickets

In some instances, it might become necessary to delete a ticket and all of its associated information.

Use the following procedure to delete a ticket from the ticket database.

1. **From the View Tickets window, highlight the ticket to be deleted.**

   To display the View Tickets window, choose either the Current Tickets or Historical Tickets command from the View menu, depending on where the ticket is located.

   If necessary, use the scroll bars in the View Tickets window to find the ticket to be deleted.

2. **Choose the Delete Ticket command from the Ticket menu, or choose the Delete tool bar button.**

   You are prompted to confirm the ticket deletion. Choose the Yes button to delete the selected ticket, or choose the No button to cancel the delete action.

   The deleted ticket is removed from the LSC ticket database and will no longer display in the View Tickets window.

NOTE:
A ticket can also be deleted while its Ticket window is open. To do so, choose the Delete tool bar button. You are prompted to confirm the delete action. Choose the Yes button to delete the ticket displayed in the open Ticket window.

WARNING:
Use the delete action with caution as all references to deleted tickets are completely removed from the LSC database.

Printing Tickets

All printing is performed using the currently defined print parameters. To modify or verify the current print parameters, choose the Print Setup command from the File menu.

Use the following procedure to print a selected ticket.

1. **From the View Tickets window, highlight the ticket to be printed.**
2. **Choose the Print Ticket command from the Ticket menu, or choose the Print tool bar button.**

   The ticket data is sent to the printer.

NOTE:
A ticket can also be printed while its Ticket window is open. To do so, choose the Print tool bar button. The ticket data is sent to the printer.

Maintaining Ticket Information

Creating a ticket is the first step towards solving a support issue and/or scheduling timed events. For example, the tickets in your LSC database may represent requests for support, or they may represent installations to be performed. In either case, ticket maintenance is required to keep the ticket database information accurate and up-to-date.

Ticket maintenance is also referred to as "ticket action." For example, if a ticket is created in order to solve a user's printing problem, all of the events that take place to solve the problem are regarded as *action* performed on the ticket. Each time an action is performed in response to a ticket, the action should be entered on the ticket. In addition to tracking the efforts of your support staff, the action entries can be used to accumulate billable time spent while trying to solve a client's problem.

Contact details can also be associated with a ticket. Contact details include information regarding the person/company for whom the ticket is issued.

The procedures regarding ticket maintenance are discussed in this section.

NOTE:
To support multiple users, LSC locks the ticket (window) as soon as it is opened by a user. This ensures that only one person can save changes to a ticket at anytime. When users attempt to edit the same ticket simultaneously, only the changes made by the "first" user will be effective (the user who locks the ticket). All other users will be alerted with a message informing them to edit the ticket later.

Adding Ticket Action

Each time an action is performed in response to a ticket, the action should be entered for problem tracking and ticket maintenance purposes. Each new ticket action is entered into the Add Action dialog box.

Use the following procedure to enter ticket action items.

1. **Display the Add Action dialog box.**

   Use any of the following methods to display the Add Action dialog box, as in Figure 6-4.

   - ❑ Choose the Add Action button in an open Ticket window to add an action item to the ticket.

- ❑ Highlight a ticket in the View Tickets window, and choose the Action tool bar button to add an action item to the selected ticket.
- ❑ Highlight a ticket in the View Tickets window, and choose the Add Action command from the Ticket menu to add an action item to the selected ticket.

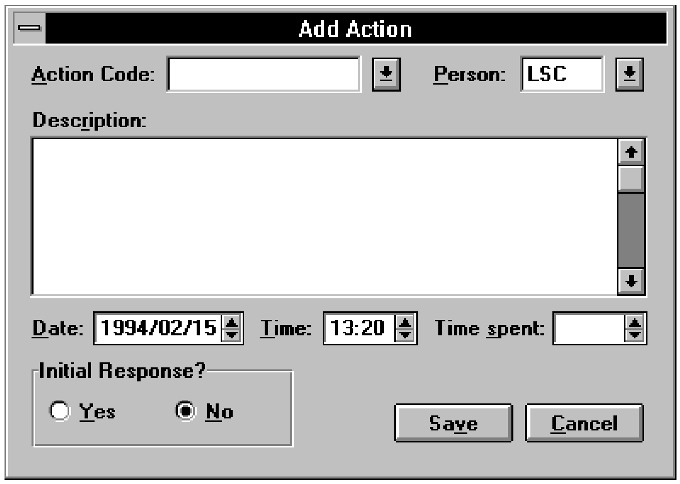

Figure 6-4: Adding Ticket Action

2. **Enter the action details.**

Each field in the Add Action dialog box is defined and discussed in the table below.

Field	Description
Action Code	Enter the code for the action performed (e.g., CALLBACK, INVESTIGATE, TO_DO). An action can be selected from the drop-down list associated with this field, or one can be typed in directly if you have been given sufficient user rights to do so. (Typing in a new action will add the new entry to the Action qualification list.)
Person	Enter the initials of the LSC staff member performing the action. The initials of the user logged in to LSC will display as the default. The initials can be selected from the drop-down list associated with this field, or they can be typed in directly if you have been given sufficient user rights to do so.
Description	Enter a detailed description of the action performed. Approximately 2 full pages of text can be entered.

Continued...

Field	Description
Date	Select the date on which the action is performed. The current system date is automatically entered as the default which can be changed by the user. The date is entered in YYYY/MM/DD format where Y=year, M=month and D=day. (Refer to the section on page 138 for procedures on editing date values.)
Time	Select the time at which the action is performed. The current system time is automatically entered as the default which can be changed by the user. The time is entered in HH:MM format where H=hour and M=minute. Use the up/down arrow buttons to scroll to a new desired time, or directly type in a new time.
Time Spent	Enter the time taken to perform the action. The time is entered in HH:MM format where H=hour and M=minute (e.g., 1:23 indicates 1 hour and 23 minutes). Use the up/down arrow buttons to scroll to a desired time, or directly type in the amount of time spent.
Initial Response	Select the Yes or No button to indicate whether or not the action being entered is the first action performed for the ticket. By default, the Initial Response button is set to No.

NOTES ON THE ADD ACTION DIALOG BOX FIELDS:

a - The hours and minutes entered in the Time Spent field are automatically accumulated by generating the Daily Action Listing By Person report. Refer to Chapter 8 for instructions on generating LSC reports.

b - The Initial Response option is set to 'No' by default. Set this option to 'Yes' when entering new actions to determine the amount of time taken to respond to a ticket. Generating the Average Initial Response Time reports will automatically calculate the average time between when the ticket(s) has been opened and when the inital response(s) has been performed.

HINT:

Create Action entries which maintain various types of information regarding the ticket. For example, create an action named CONFIG to be used to describe a caller's workstation configuration. By entering the configuration information in the Description field, you can then filter the ticket list using the Keyword Search in Action Description option (e.g., filter all "386" machines).

3. Choose the Save button.

The new action does not immediately display in the action items area of the View Tickets window. Click on the highlighted ticket in the View Tickets window to update the action items for the selected ticket.

Editing Ticket Action

Existing ticket action entries are edited using the Edit Action dialog box.

Use the following procedure to edit an existing ticket action item.

1. **Display the Edit Action dialog box.**

   Use any of the following methods to display the Edit Action dialog box, as in Figure 6-5.

   - ❑ Double click on an entry listed in the action items area of the View Tickets window to edit an action item for the highlighted ticket.
   - ❑ Highlight a ticket in the View Tickets window, and choose the Edit Action tool bar button.
   - ❑ Highlight a ticket in the View Tickets window, and choose the Edit Action command from the Ticket menu.

   The Edit Action dialog box displays the information entered for the existing action item.

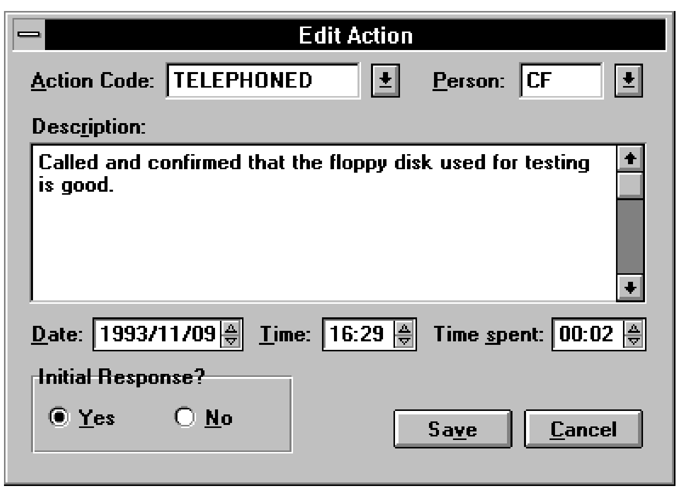

Figure 6-5: Editing Ticket Action

2. **Modify the action details.**

The fields in the Edit Action dialog box are identical to those in the Add Action dialog box. Refer to the table on page 132 for details on each field.

To modify the information entered in a field, move the typing cursor into the field and enter the new information. Selecting a new item from a drop-down list will automatically enter the new item into the field.

Pressing the <TAB> key will move the cursor from field-to-field within this dialog box.

3. **Choose the Save button.**

   The modified action information displays in the action items area of the View Tickets window.

Deleting Ticket Action

Use the following procedure to delete an existing ticket action item.

1. **From the action items area of the View Tickets window, highlight the action entry to be deleted.**
2. **Choose the Delete Action command from the Ticket menu, or choose the Delete Action tool bar button.**

   You are prompted to confirm the deletion. Choose the Yes button to delete the selected action entry, or choose the No button to cancel the delete action.

   The deleted action entry is removed from the LSC ticket database and is no longer listed in the action items area of the View Tickets window.

Maintaining Contact Details

Contact details can be entered and associated with a ticket. For tickets that are created in response to a customer problem or issue, a contact name and number becomes vital to the quality of the support provided by your staff.

Contact details include the address, fax and Email information for a specific Company ID. For example, assume that you frequently create tickets for the Blue Ribbon company which has three office locations. Three Company IDs are set up: Blue Ribbon-NY, Blue Ribbon-NJ, and Blue-Ribbon-CT. By simply selecting one of the Blue Ribbon company IDs, the desired contact information is associated with the ticket.

NOTES:

a - Company IDs are set up by choosing the Setup Company command from the Administration menu (refer to the detailed procedures in “Company IDs” in Chapter 5.

b - Changing the information in the Contact Details dialog box will update the Company ID data throughout the LSC database. All existing and future tickets will reflect the updated information.

Use the following procedure to enter and maintain contact details to be associated with a ticket.

1. **Highlight a ticket in the View Tickets window, or open a Ticket window for which contact details are to be entered.**

2. **Choose the Contact tool bar button, or choose the Contact Details command from the Ticket menu.**

   The Contact Details dialog box displays, as in Figure 6-6. Any contact information previously entered for the selected ticket will also display.

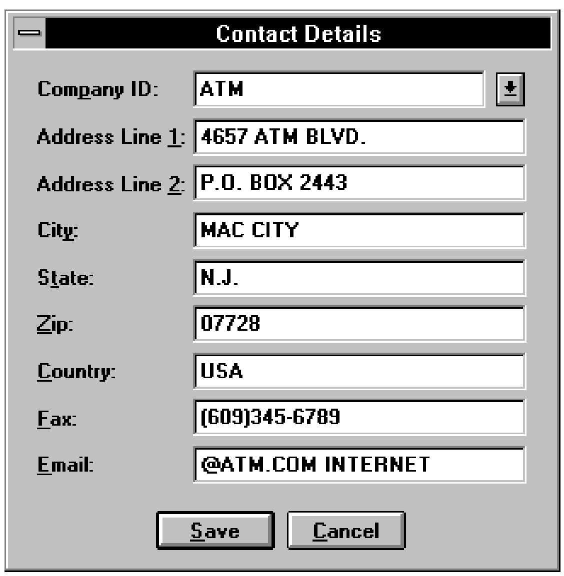

Figure 6-6: Entering Contact Details for a Ticket

3. **Enter or modify the contact information to be associated with the selected ticket.**

   The fields in this dialog box correspond to a Company ID.

- ❑ Select an existing Company ID to automatically fill in the address and phone information that has been defined for the selected Company ID.
- ❑ Enter new company information (new Company ID, address and phone) to create a new Company ID.
- ❑ Modify the field data to update the Company ID information.

All fields are optional.

NOTE:
The Company ID field is linked to the Account ID entered in the Ticket window. For example, assume that the "Blue Ribbon" account is set up with "Blue Ribbon-NY" as its Company ID. In this case, when "Blue Ribbon" is entered in the Account ID field in the Ticket window, all contact information for "Blue Ribbon-NY" will automatically display in the ticket's associated Contact Details dialog box. Refer to Figure 6-7.

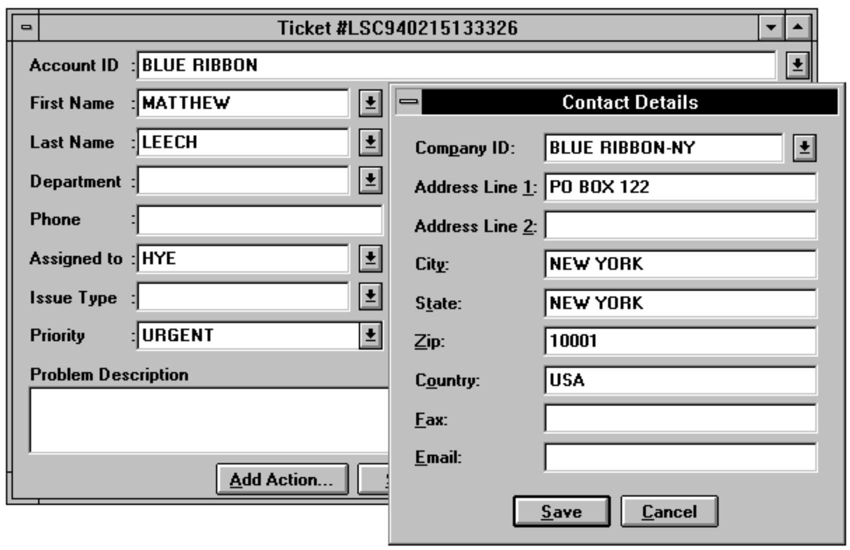

Figure 6-7: Contact Details for the Blue Ribbon Account

4. Choose the Save button.

If you have made changes to existing Company ID information, you are prompted to save the modified information to the Company ID. Choose the Yes button to save the changes, or choose the No button to cancel any changes you have made.

NOTE:
Choosing the Yes button in response to this prompt will update the contact details information for the Company ID. The contact details for all new and existing tickets will reflect the updated information.

Editing Dates

Throughout LSC, there are several places where the user is able to enter or edit a date. In every date field, a pop-up dialog box can be displayed by double clicking in the field. These date fields include:

- the Ticket window's "Opened On" and "Closed On" fields
- the Add Action and Edit Action dialog box "Date" field
- the Filter Ticket List dialog box "Open Tickets From/To" and "Closed Tickets From/To" fields

Scrolling to a New Date or Time

Every date and time field has "spin" buttons that can be used to change the value entered in the field. These spin buttons look similar to scroll buttons and are useful when you want to change the existing value to one that is already close to the desired value. For example, if "1994/01/15" is entered in the date field, click on "1994", and then choose the up scroll button to quickly change the date to "1995/01/15."

Remember, first click on the part of the value to be changed (e.g., year/month/day or hour/minute), and then choose the desired spin direction (either up or down).

Moving to a New Date

Double clicking in a date field displays a calendar similar to Figure 6-8.

Figure 6-8: Modifying a Date Field

If there is a date value in the field when you double click, then that date will be reflected in the dialog box. For example, when the calendar in Figure 6-8 was displayed, the value “1993/11/05” was entered in the Date field. If there is no date value in the field when you double click, then the current system date will be reflected in the calendar.

Use the following procedure to change a date value using the calendar.

1. **Double click in the Date field.**

   The calendar displays, as in Figure 6-8.

2. **Modify the Year, Month or Day.**

   - ❑ To modify the year value, choose the left or right arrow buttons next to the year date. (In Figure 6-8, the year date is “1993” displayed at the top of the dialog box. Choose the left arrow button to change the year to 1992; choose the right arrow button to change the date to 1994.)
   - ❑ To modify the month value, choose the left or right arrow buttons next to the indicated month. (In Figure 6-8, the month is “NOVEMBER.” Choose the left arrow button to change the month to OCTOBER; choose the right arrow button to change the month to DECEMBER.)
   - ❑ To modify the date, choose a new date by clicking on a new date number. (In Figure 6-8, the currently selected date is “5.”)

3. **Choose the OK button.**

The calendar closes, and the selected date value is entered into the Date field.

Investigating

LAN Support Center provides the capability for extensively tracking and managing various types of events. In some instances, investigation may be required to obtain additional information to resolve a problem or handle a support call. LSC lets you smart-launch into other McAfee applications installed on your network to take advantage of the applications' network management capabilities.

The McAfee products accessible from within LSC are:

- ❑ **BrightWorks** - McAfee's software management solution which integrates SiteMeter software metering with LAN Inventory asset management and adds software distribution capabilities.
- ❑ **SiteMeter Administration** - McAfee's software metering and virus protection program which maximizes the legal and productive use of your software.
- ❑ **SiteMeter Usage Monitor** - SiteMeter's Usage Monitor which displays information regarding an application's current use.
- ❑ **SiteMeter Reports** - SiteMeter's Reporting module which lets you generate reports containing information regarding software metering and the virus protection established for your network.
- ❑ **LAN Inventory** - McAfee's asset management program which collects and manages detailed inventory data for your local area network(s). (Workstation hardware and software configuration information can be accessed to help troubleshoot problems.)
- ❑ **NetRemote** - McAfee's remote control program which enables control over another user's workstation for the purpose of performing diagnostics.

NOTES:

a - For detailed information on the individual McAfee products, refer to the documentation provided in each product package.

b - The Investigate option requires that a search path be established to all of the McAfee products.

Smart-Launching

Use the following procedure to smart-launch into another McAfee application.

1. Choose the LSC Investigate tool bar button.

You can also choose the Investigate command from the Ticket menu. In either case, the Smart-Launch McAfee Applications dialog box displays.

Only the applications that are in your search path are accessible from the Smart-Launch dialog box. All other application options are disabled.

The Context area of the Smart-Launch dialog box displays the username and network address of the currently open and active LSC Ticket window. The Username is obtained from the ticket's First Name field, and the Station Address is obtained from the ticket's Network Address field.

2. **Select a McAfee application, and choose the OK button.**

   The selected application launches, as follows:

   - **BrightWorks** - BrightWorks is launched and displays the administration console. Use the BrightWorks console to perform software metering, asset management and software distribution.
   - **SiteMeter Administration** - SiteMeter is launched and displays the administration console. Use the SiteMeter console to investigate software usage activity and detect corrupted files.
   - **SiteMeter Usage Monitor** - SiteMeter is launched and displays the SiteMeter Usage Monitor for the file server associated with the Network Address in the currently active LSC Ticket window. If the active Ticket window does not contain the network address of a server, then the SiteMeter administration console displays. Use the SiteMeter Usage Monitor to see which users are using which applications.
   - **SiteMeter Reports** - The SiteMeter reporting module displays in a DOS box. Use SiteMeter Reports to generate reports with information regarding software metering and the virus protection established for your network.
   - **LAN Inventory** - LAI is launched and displays the inventory details associated with the First Name and Network Address fields in the currently active LSC Ticket window. Use LAI to investigate the hardware and software configuration of a workstation to determine the cause of a problem.
   - **NetRemote** - NetRemote is launched and positioned to call the workstation associated with the Network Address in the currently active LSC Ticket window. Use NetRemote to take control over a workstation experiencing problems.

3. **Use the McAfee application to investigate the problem.**

   For instructions on using the application, refer to the manual included in each product package.

4. **Exit the application.**

   For instructions on exiting the application, refer to the manual included in each product package.

   Upon exiting the application, you are returned to LSC.

This ends the chapter on creating and maintaining LSC work tickets. Refer to the next chapter for procedures on viewing ticket data.