Chapter 7 Viewing Ticket Data

The previous chapter discussed the procedures for creating and managing ticket information. This chapter discusses the various methods available for viewing ticket information.

Introduction

LAN Support Center provides various methods for viewing ticket information. An entire database of ticket information and the tickets' actions can be viewed via the View Tickets window; additionally, specific ticket information can be viewed via the Ticket window. (Refer to the overview of these windows in "The View Tickets Window" in Chapter 4.)

To accommodate users who are responsible for working on a particular type of ticket, the information displayed in the View Tickets window can be filtered to display only the tickets matching specific filter criteria. For example, if Sue is only responsible for the tickets that have an URGENT priority, then Sue may only want those tickets to display in her View Tickets window. Similarly, if Anna is responsible for scheduling training classes, then Anna may only want to view the tickets which pertain to the Training Department.

The various methods for managing the LSC ticket data display are discussed in this chapter.

What's in this Chapter

The following chart describes the sections in this chapter:

SECTION	DESCRIPTION
Filtering the View Tickets Window Display	Provides procedures for applying filter criteria against the View Tickets window.
Sorting the View Tickets Window Display	Provides procedures for defining the order in which the tickets are listed in the View Tickets window.
Custom Ticket Views	Provides procedures for creating customized views of the information which displays in the View Tickets window.
Ticket Databases	Provides procedures for viewing either the current ticket database or an historical ticket database.

Filtering the View Tickets Window Display

Applying filter criteria to the View Tickets window causes LSC to display only those tickets that match the defined filter information. When no filter criteria is defined, all tickets in the LSC database are listed in the View Tickets window.

Filtering the Ticket List

Use the following procedure to define filter criteria and narrow down the number of tickets that display in the View Tickets window. Filter criteria can be applied to the current and historical ticket databases.

1. **Choose the View tool bar button to display the View Tickets window.**

   The View Tickets window must be open to define filter criteria.

2. **Choose the Filter tool bar button.**

   You can also choose the Filter command from the View menu. The Filter Ticket List dialog box displays, as in Figure 7-1. If filter criteria have already been applied to the View Tickets window, then the defined criteria will display in the Filter Ticket List dialog box.

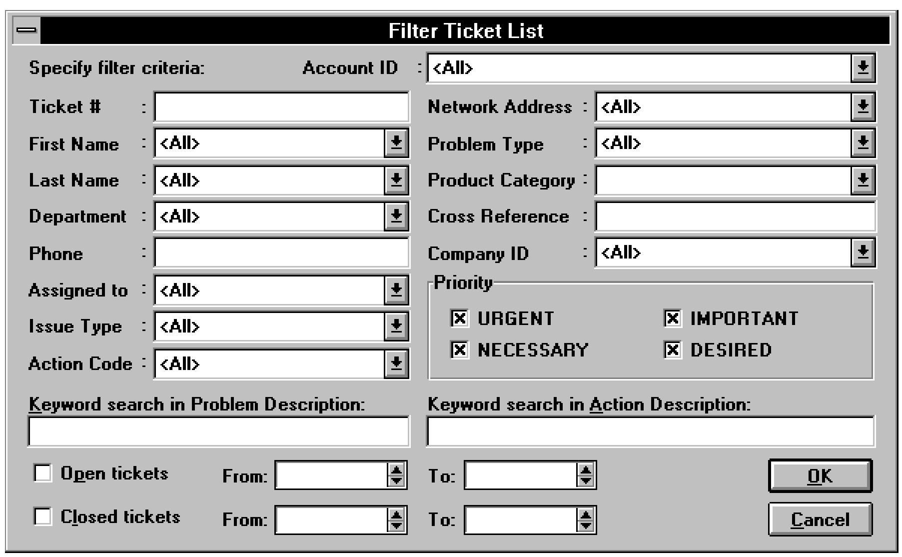

Figure 7-1: The Filter Criteria Applied Against the View Tickets Window

NOTE:
If your LSC database labels have been modified, the field names and definitions for your Filter Ticket List dialog box will be different. For more information on labeling, refer to "Database Labeling" in Chapter 5.

3. **Define the filter criteria.**

   Many of the fields in the Filter Ticket List dialog box are identical to the fields in the Ticket window. For example, entering KELLY in the First Name field of the Filter Ticket List dialog box will instruct LSC to include all tickets that have KELLY in the First Name field of the Ticket window. Similarly, many fields 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. Clicking on an entry in the drop-down list places the chosen entry in the selected field.

Field	Description	Corresponding Field Location
Account ID	From the drop-down list, select one Account ID.	Add/Edit Account dialog box; Ticket window
Ticket #	Enter a specific ticket number.	Ticket window title bar
First Name	From the drop-down list, select one first name.	Ticket window
Last Name	From the drop-down list, select one last name.	Ticket window
Department	From the drop-down list, select one department.	Ticket window
Phone	Enter a specific phone number.	Ticket window
Assigned to	From the drop-down list, select one staff member to whom tickets were assigned.	Ticket window
Issue Type	From the drop-down list, select one ticket issue type.	Ticket window
Action Code	From the drop-down list, select one action code.	Add/Edit Action dialog box

Continued...

Field	Description	Corresponding Field Location
Network Address	From the drop-down list, select one network address.	Ticket window
Problem Type	From the drop-down list, select one problem type.	Ticket window
Product Category	From the drop-down list, select one product category.	Ticket window
Cross Reference	Enter specific cross reference information.	Ticket window
Company ID	From the drop-down list, select one company ID.	Add/Edit Company; Contact Details dialog box
Priority	Place a checkmark in the priorities to be included in the filtered view. (At least one Priority must be selected.)	Ticket window
Keyword search in Problem Description	Enter a word or phrase to use in a context sensitive search in the Problem Description field of the Ticket window. Wildcards searches cannot be performed.	Ticket window
Keyword search in Action Description	Enter a word or phrase to use in a context sensitive search in the Description field of the Add/Edit Action dialog box. Wildcards searches cannot be performed.	Add/Edit Action dialog box
Open Tickets From/To	Enter an optional date range to restrict the number of tickets which apply. (Refer to “Maintaining Ticket Information” in Chapter 6 for procedures on editing date values.)	Ticket window (tickets having an Open Status)
Closed Tickets From/To	Enter an optional date range to restrict the number of tickets which apply. (Refer to “Maintaining Ticket Information” in Chapter 6 for procedures on editing date values.)	Ticket window (tickets having a Closed Status)

NOTES ON THE FILTER TICKET LIST DIALOG BOX:

a - The <All> entry causes the field to be ignored in the filter definition.

b - The <Blank> entry includes those tickets having blank corresponding fields.

c - Wildcards are not allowed in any of the filtered fields.

d - When entering a date range, the To date must be equal to or later than the From date.

e - At least one Priority must be selected.

4. Choose the OK button.

The ticket information is filtered, and only those tickets that match the defined criteria will display in the View Tickets window.

The View Tickets window in Figure 7-2 illustrates the application of a filter which specified the entry 'LEECH' in the Last Name field.

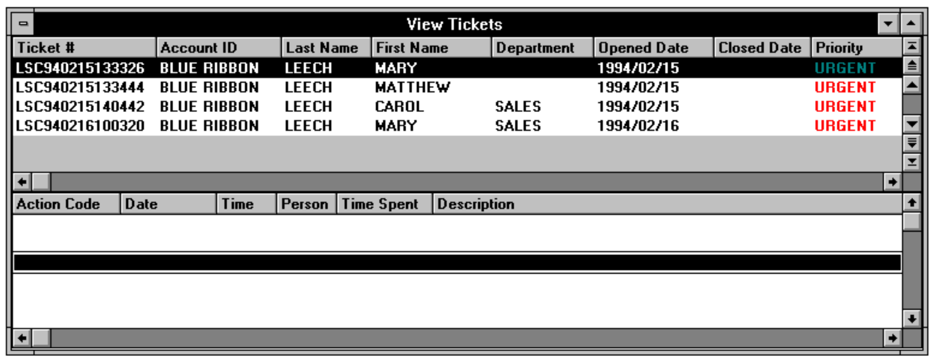

Figure 7-2: A Filtered List of Tickets

Sorting the View Tickets Window Display

Defining a sort order for the tickets in the View Tickets window instructs LSC to list the tickets according to a new sort order method. Depending on the selected sort order, up to three sort criteria can be defined. For example, if the primary sort key is defined as Assigned To, then the tickets can be further sorted according to Priority and then Problem Type. Given this sort order definition, the tickets in the View Tickets window would be sorted as in Figure 7-3 below.

In Figure 7-3, tickets are first listed according to the alphabetic order of the Assigned To field. The tickets are then sorted according to Priority (see note below) and finally sorted according to the alphabetic order of the Problem Type field.

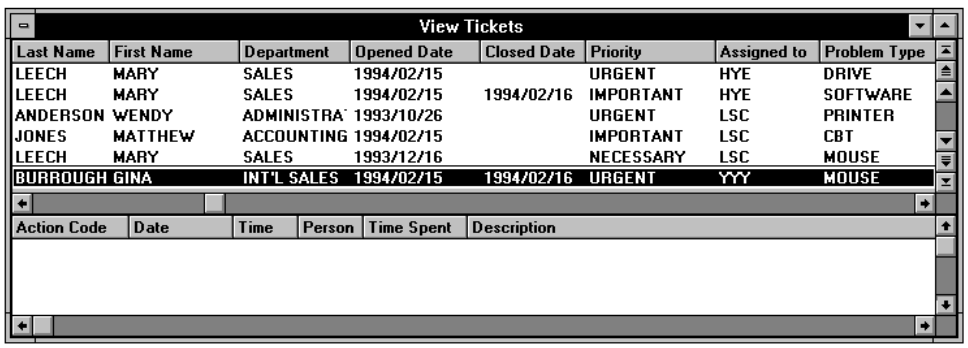

Figure 7-3: A Re-Sorted List of Tickets

NOTES:

a - Sorting by Priority will result in the tickets appearing in the following order: URGENT, IMPORTANT, NECESSARY, DESIRED.

b - Sorting by Date will result in the tickets being listed in ascending date order (i.e., older dates are listed first).

Sorting the Ticket List

Use the following procedure to define the sort order of the tickets in the View Tickets window.

1. **Choose the View tool bar button to display the View Tickets window.**

   The View Tickets window must be open to define a sort order.

2. **Choose the Sort tool bar button.**

You can also choose the Sort command from the View menu. The Select Sort Criteria dialog box displays, as in Figure 7-4. If a sort order has already been applied to the View Tickets window, then the defined sort criteria will display in the Select Sort Criteria dialog box.

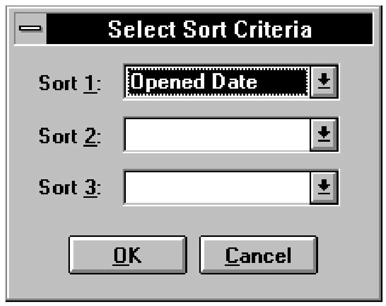

Figure 7-4: Selecting Sort Criteria

NOTE:
If your LSC database labels have been modified, the sort order names in your Select Sort Criteria dialog box will be different. For more information on labeling, refer to "Database Labeling" in Chapter 5.

3. Define the sort order.

Each Sort # field has a drop-down list from which the sort criteria can be selected. Depending on the selected sort order, up to three sort criteria can be defined.

The following table lists the fields that can be sorted and describes the sort result.

Sorted Field	Sort Method
Assigned To	Alphabetical - from A to Z
Closed Date	Numerical - increasing date order
Department	Alphabetical - from A to Z
Issue Type	Alphabetical - from A to Z
Last Name	Alphabetical - from A to Z
Opened Date	Numerical - increasing date order
Priority	Ordered according to: URGENT, IMPORTANT, NECESSARY, DESIRED

Continued...

Sorted Field	Sort Method
Problem Type	Alphabetical - from A to Z
Product Category	Alphabetical - from A to Z
Ticket #	Alphanumerically - from A to Z for the first three characters and then from 1 to xxx

4. **Choose the OK button.**

   The tickets in the View Tickets window are sorted according to the defined sort order.

Custom Ticket Views

A custom ticket view is a cross section of the tickets in the LSC database. Custom ticket views selectively display tickets that meet specific filter criteria, and as a result, they narrow down the number of tickets that display in the View Tickets window. Creating a custom ticket view is identical to applying filter and sort criteria; however, a custom view is saved and can be added to the View menu.

LSC provides several pre-defined ticket views which cannot be modified or deleted. Choosing the View menu displays the following pre-defined view options:

- ❑ Opened Assigned Tickets by Date
- ❑ Opened Assigned Tickets by Priority
- ❑ All Opened Tickets by Date
- ❑ All Opened Tickets by Priority
- ❑ All Closed Tickets by Date
- ❑ All Tickets by Date

Choosing a view option filters the View Tickets window data and displays only those tickets that apply to the selected view option.

LSC also allows users to create their own customized views of the ticket data. Ticket views are created by defining filter criteria and a sort order to be applied to the tickets listed in the View Tickets window. For example, assume that Karen only wants to view the tickets that have been assigned to her. Furthermore, Karen wants the tickets to be listed in ascending date order. In this case, Karen would define a filter which included only the tickets that have KRN in the ‘Assigned To’ Ticket window field (i.e., Karen’s login initials), and she would specify ‘Opened Date’ as the primary sort order. Karen would then save her customized view as “Karen’s View.”

Creating Custom Ticket Views

Creating a custom ticket view narrows down the number of tickets that display in the View Tickets window, thereby, allowing the support staff to view only the tickets that pertain to them.

The procedure for creating a custom ticket view incorporates the procedures for “Filtering the Ticket List” and “Sorting the Ticket List” discussed on pages 149 and 153, respectively.

NOTE:
To accommodate the limited length of a pop-up menu, the maximum number of custom views that can appear on the View menu is ten (10).

Use the following procedure to create a custom ticket view.

1. **Choose the Custom View Settings command from the Administration menu.**

   The Custom View Settings dialog box displays, as in Figure 7-5. This dialog box list any custom views that have already been defined.

NOTE:
Because the pre-defined LSC custom views cannot be edited or deleted, they are not listed in this dialog box.

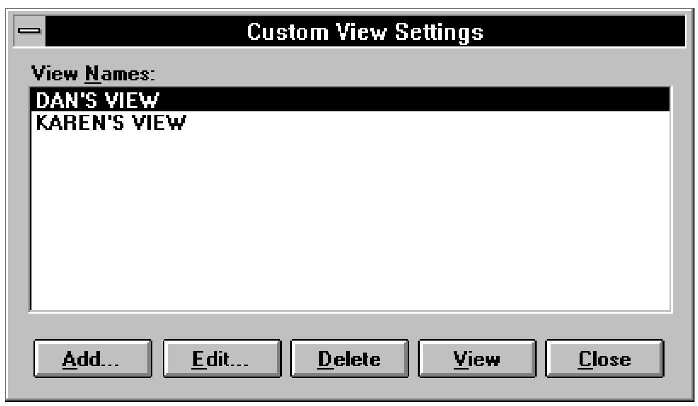

Figure 7-5: The List of Custom Views

2. **To define a new custom view, choose the Add button.**

The Add View Name dialog box displays, as in Figure 7-6.

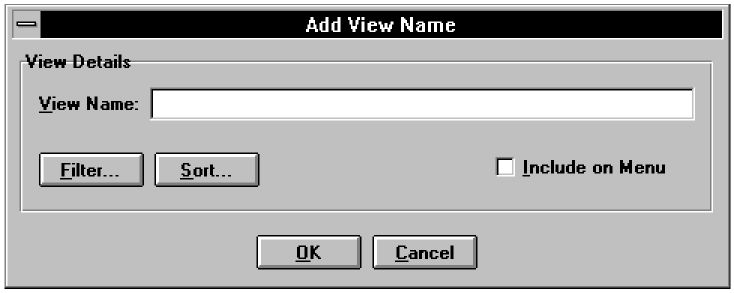

Figure 7-6: Defining the New View

3. **In the View Name field, type the name to be assigned to the new view.**

   All typed characters are valid. The view name is automatically entered as uppercase.

4. **To define the filter criteria for the new view, choose the Filter button.**

   The Filter Ticket List dialog box displays, as in Figure 7-7.

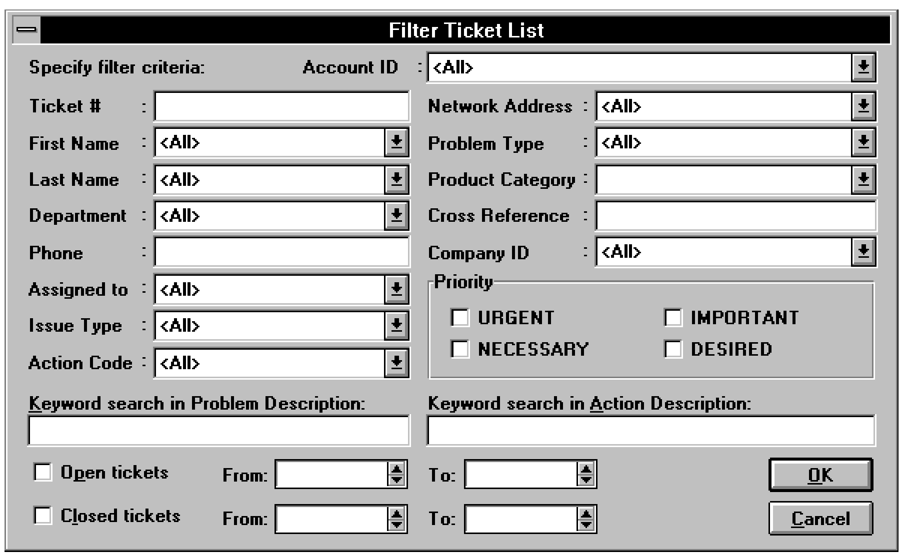

Figure 7-7: Defining Filter Criteria for a Custom View

5. **Define the filter criteria, and choose the OK button.**

Detailed procedures for defining filter criteria are discussed on page 149. Upon pressing the OK button, you are returned to the Add View Name dialog box.

6. **To define the sort order for the new view, choose the Sort button.**

   The Select Sort Criteria dialog box displays, as in Figure 7-8.

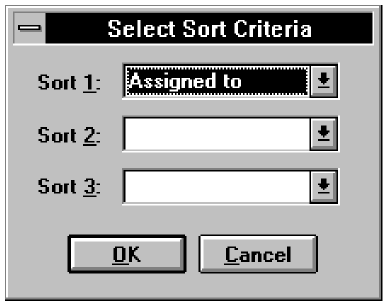

Figure 7-8: Defining Sort Criteria for a Custom View

7. **Define the sort order, and choose the OK button.**

   Detailed procedures for defining sort order are discussed on page 153. Upon pressing the OK button, you are returned to the Add View Name dialog box.

8. **To include the new view name on the LSC View menu, check the Include on Menu option.**

   Click in the option box to place a checkmark in the box and enable the option. Including the view name on the View menu allows for quick access to the view.

   In Figure 7-9, KAREN'S VIEW has been included on the View menu.

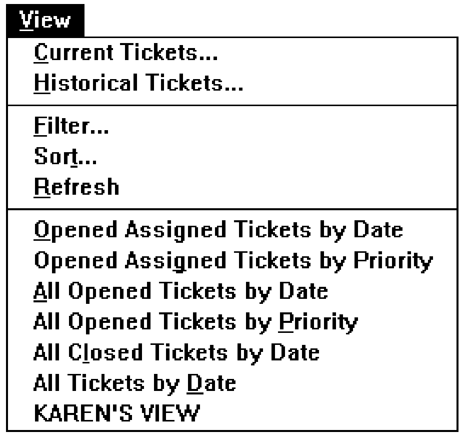

Figure 7-9: A Custom View Added to the View Menu

NOTE:
Selecting the Include on Menu option will cause the view name to display on all LSC users' View menus.

9. **Choose the OK button.**

   The new view is added to the list of views in the Custom View Settings dialog box.

Maintaining Custom Ticket Views

Custom ticket views can be edited and/or deleted. Because support staff job responsibilities and requirements often change, the filter and sort criteria of the custom views may need to be modified.

Use the following procedure to delete and/or modify custom ticket views.

1. **Choose the Custom View Settings command from the Administration menu.**

   The Custom View Settings dialog box displays listing the custom views that have been defined.

2. **To delete a custom view, highlight the view name and choose the Delete button.**

   A prompt displays asking you to confirm the delete action. Choose the Yes button to delete the selected view. (Choose the No button to cancel the delete action.)

The custom view is deleted from LSC. The view name is removed from the list of views in the Custom View Settings dialog box, and it will no longer display on the View menu.

3. **To edit custom view settings, highlight the custom view name and choose the Edit button.**

You can also double click on the view name to be edited. The Edit View Name dialog box displays, as in Figure 7-10. The name of the selected view is automatically entered into the View Name field.

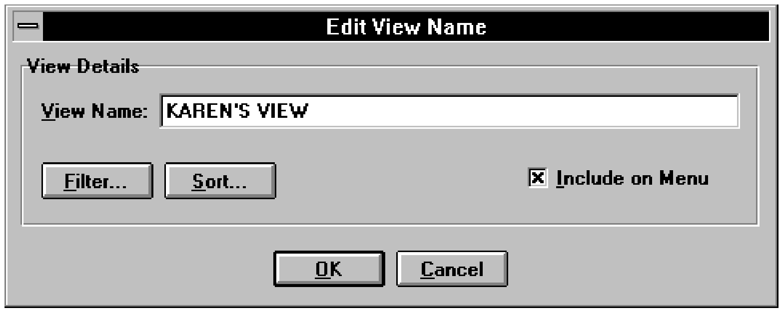

Figure 7-10: Editing a Custom View

4. Edit the view criteria.

The View Name, Filter criteria, Sort order and Include on Menu definitions can be modified.

a - To edit the view name, move the typing cursor into the View Name field and enter a new name for the custom view. (When the Edit View Name dialog box first displays, the entry in the View Name field is highlighted. Typing a new name will erase the highlighted name and enter the characters you type.)

b - To edit the filter definition, choose the Filter button. The Filter Ticket List dialog box displays showing the view's defined filter criteria. Make any changes to the filter definition, and choose the OK button.

c - To edit the sort order, choose the Sort button. The Select Sort Criteria dialog box displays showing the view's defined sort order. Make any changes to the sort order, and choose the OK button.

d - To include/exclude the view name from the View menu, select/deselect the Include on Menu option. This option box toggles on and off when selected.

5. After all modifications are made, choose the OK button.

You are returned to the Custom View Settings dialog box. Any changes to the view name are reflected in the View Names list.

6. To apply the edited view to the View Tickets window, choose the View button.

The View Tickets window displays with the selected view.

Ticket Databases

To facilitate efficient disk space usage, LSC lets you archive tickets. Based on any number of filtering criteria, tickets can be tagged and moved out of the current database file and into an "historical" database file. (The procedure for archiving tickets is discussed in "Archiving and Restoring Tickets" in Chapter 5.)

Historical database files are not compressed, and therefore, support staff members can access tickets that are maintained in either the "current database" or an "historical database." The database used during the support staff's daily operation is the current database. New tickets are added to the current database, and open or active tickets are maintained in the current database. A historical database may be referenced for investigative or problem research purposes.

The procedures for loading an historical database and the current database are discussed in this section.

Viewing Historical Tickets

Use the following procedure to access the tickets maintained in an historical ticket database file.

NOTES:

a - Historical database files are created upon ticket archiving. Therefore, the following procedure can only be performed if you have already archived tickets. Refer to "Archiving and Restoring Tickets" in Chapter 5.

b - LSC allows you to view either the current or a historical database. Before you switch from one to the other, you need to close all ticket windows to prevent database corruption.

1. **Choose the Historical Tickets command from the View menu.**

The Choose Historical Database to View dialog box displays, as in Figure 7-11.

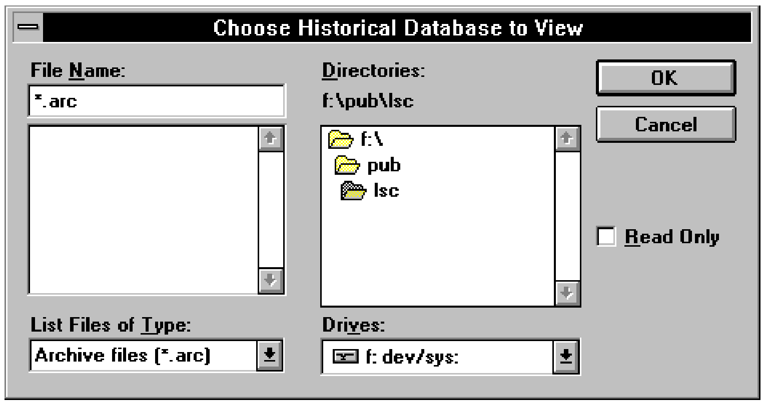

Figure 7-11: Loading an Historical Database

2. **Make selections from the Directories and Drives lists to find the archived file to view.**

   For example, choose the Drives down arrow button, and click on Drive G: to display the directories on drive G. Then click on a directory name to display the list of files it maintains.

   By default, *.ARC will display in the File Name field, thereby instructing LSC to list all files in the selected directory that have the extension *.ARC. You can modify this field entry if you have saved the historical file with a different extension (e.g., *.old).

3. **Select a file from the File Name list.**

   Click on a file name to enter the name into the File Name field.

4. **To mark the historical file as Read Only, enable the Read Only option.**

   Placing a checkmark in this field will prohibit any changes to be made to the tickets in the historical file.

NOTE:
To avoid inadvertently making changes to a historical database file, it is highly recommended that you mark the file as Read Only when selecting the historical file to be viewed.

5. **Choose the OK button.**

The tickets in the selected historical database file are listed in the View Historical Tickets window, as in Figure 7-12.

NOTE:
The historical ticket information will display according to the currently defined filter criteria and sorting options. To view all tickets in the historical database file, make sure that filter criteria is not applied to the View Tickets window.

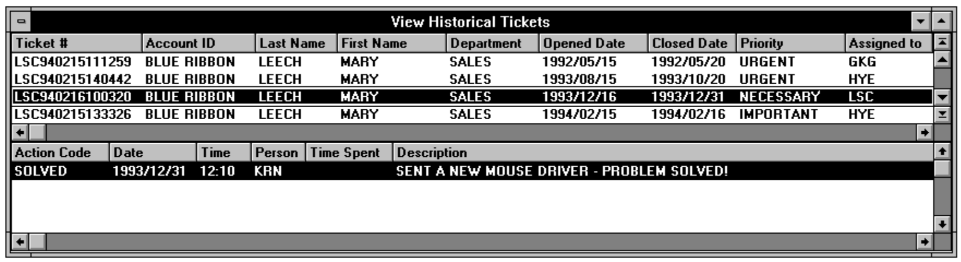

Figure 7-12: Viewing an Historical Ticket Database

Viewing Current Tickets

After viewing tickets in a historical database file, choose the Current Tickets command from the View menu to view the tickets in the current LSC database. The tickets in the current database will display in the View Tickets window.

NOTES:

a - The current ticket information will display according to the currently defined filter criteria and sorting options. To view all tickets in the current database file, make sure that filter criteria is not applied to the View Tickets window.

b - LSC allows you to view either the current or a historical database. Before you switch from one to the other, you need to close all ticket windows to prevent database corruption.

This ends the chapter on viewing ticket information. Refer to the next chapter for instructions on generating reports based on the ticket information being maintained by LSC.