BLUE CHAMELEON : Advanced Functions and Configuring : Ticket issuing prerogatives and administration

For links outside this document,

download the relevant chapter or the Blue Chameleon Full Documentation.

December 19, 2013

Appendix A

Ticket issuing prerogatives and administration

The user that creates a ticket belongs to a user group (9.4.1) which may be set to issue only a certain type of tickets, according to the functions you define this user group to stand for ; moreover, the user's rights can also be set in order to rule her/his view options and forward capabilites.

This principle enables to quicken ticket creation as well as most importantly to avoid bad ticket forwards to user groups that do not have the skills to process them.

It must be strongly pointed up that the rights of a user are *only* defined by her/his user rights, not her/his belonging to a user group, as this structure does not grant rights.

All of this is accomplished thanks to the ticket administration tools, which are accessed via Add-ons / Helpdesk / Administration . Then, as pictured in Fig.A.1, the Administration menu shows five buttons whose functions are cleared up below.
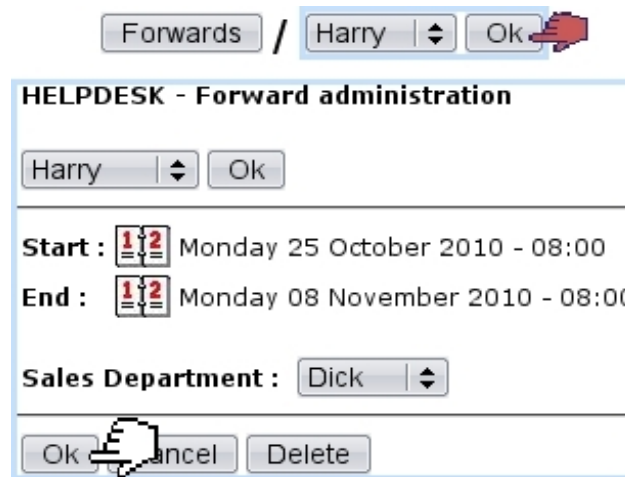

Figure A.1: The Ticket administration menu.

A.1   The *Forwards Administration Page*

This page is accessed via [Forwards]. Should a user be missing for a while, its utility is to forward all the tickets this user will receive from a start date and time to an end date and time to other users.

For instance, user Harry, member of the 'Sales Department' user group, will be missing for one week and his tickets will be forwarded to user Dick. At the page accessed via [Forwards], user Harry is picked and then the start/end dates and times inbetween which forwarding will be active are chosen.

A list of the user group(s) Harry belongs to is also displayed (Sales Department) with a drop-down menus designed to choose one other user of that group to whom tickets will be forwarded, Dick for that matter. The process is summed up at Fig.A.2.

Figure A.2: Forwarding tickets for Sales Department user Harry to same user group member Dick, for two weeks.

A.2   The *List of Ticket Types Page*

Ticket types allow you to group your tickets into clusters in order to render searches more accurate and to have a clearer stand upon your company's activities. Via [Ticket types], as displayed at Fig.A.3 are displayed current ticket types.

A.2.1   Creating ticket types

While on this page, click on [Add type] to define a new ticket type. As Fig.A.4 shows, general informations and properties are first given :

- **General** :
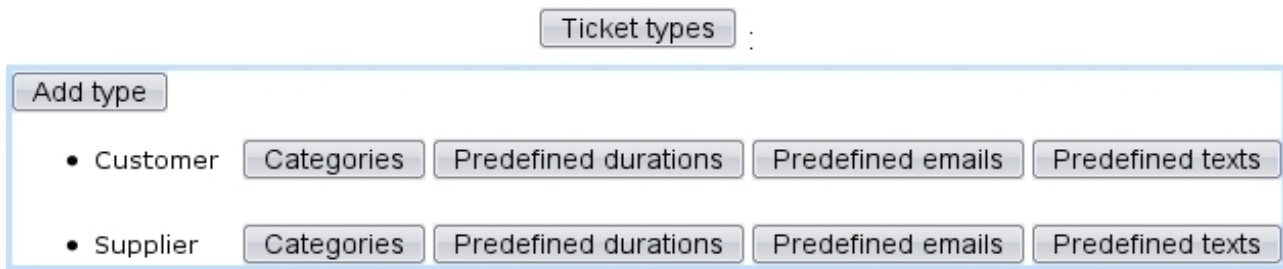 - a name for this new ticket type

Figure A.3: The *List of Ticket Types Page*, allowing to make ticket genres as accurate as possible.

- – 'Base ticket type :' : decides whether this new ticket type is based on a pre-existing one, in which case all the following fields are disabled ;
- – whether tickets of this type can have their ticket type modified ;
- – the style for this ticket type (A.3) ;

- **Properties** :
  - – whether tickets of this type will force the selection of a client or it is optional ;
  - – whether tickets of this type will have a priority ('none', 'view' : ticket's priority is read-only, 'modify') ;
  - – visibility : permits to choose if a ticket of this type will always remain private or public (i.e. for back-office only or both front-office and back-office), or will be subject to be changed from one state to the other anytime ;
  - – whether tickets of this type can be created in Front-Office ;
  - – whether the duration (8.2.4) is proposed or not, or optional, or predefined (A.2.2.4) ;
  - – whether actions for tickets of this type can be billed ;
  - – whether a file can be added when doing an action on tickets of this type ;
  - – notification : choosing 'none' removes the possibility to send a notification email (A.2.2.2) to the client, 'free' allows it, 'forced' makes it mandatory.

Other data can be configured at the bottom of the page, as featured at Fig.A.5 :

- Access ;

- Supervisor management ;

- SLA notification.

Once a ticket type has been created by clicking on Create at the bottom of the page, this new type is listed at the previous *Ticket Types Page*. Six buttons on the right of the name of ticket type allow then to act on it. The two rightmost buttons, Modify and Delete (not featured on Fig.A.3) respectively enable to modify the type's properties as they are shown above and completely remove the ticket type.

Figure A.4: Main data for new ticket type 'Customer', aimed at client complaints.

> ⚠️ *After a ticket type has been created, its Edit Ticket Type page as accessible through* Modify *features two new fields :*
>
> - 'Billable action', deciding whether actions related to this ticket type will be billed or not ;
>
> - 'Creation enabled', deciding whether this ticket type will be available for manually-created tickets, as opposed to automatic tickets created by the shop : for the former case, **this must be set to yes**.

A.2.2 Going further into ticket type configuration

Ticket types offer more options to shape them to precise needs.

A.2.2.1 Categories and parameters for a ticket type

On the *Ticket Types Page* (A.3), the leftmost button, Categories , allows to make ticket description better. For instance, we could want a ticket of the Customer type (as created above) to be split into two kinds, 'product' and 'service' in order to make distinction between complaints about faulty products and complaints about quality of service. To fulfill this wish, a Complaint category could be created, holding the two parameters 'Product' and 'Service'.

This is provided by the *Categories Page*, accessed by clicking on foresaid button. The simple process of creating a new category (whose only property is its name) is then shown at Fig.A.6 on the left. Afterwards, on this page, categories are displayed as list, and for

Figure A.5: Other data to configure a ticket type with.

each of them, modifying (which is just a name change for that matter) and removing are possible thanks to the eponymous buttons.

Finally, the leftmost button of this page, Parameters , allows you to define parameters in the way illustrated at Fig.A.6 on the right.

Another example would be for instance concerning tickets of a 'Supplier' type ; a 'Problem' category could then be defined, embracing the parameters 'Quality' and 'Delivery'.

A.2.2.2 Predefined emails

As shown in Fig.A.7, a predefined email is added via Predefined emails / Add email .

Once it has been created, it is possible to view your text in a pop-up window, modify it (similarly as above) or delete it by clicking the eponymous buttons. Add other language lets you create a text of the same text type and title, but in another language ; indeed, the language drop-down menu lets you pick any language in which the text has not yet
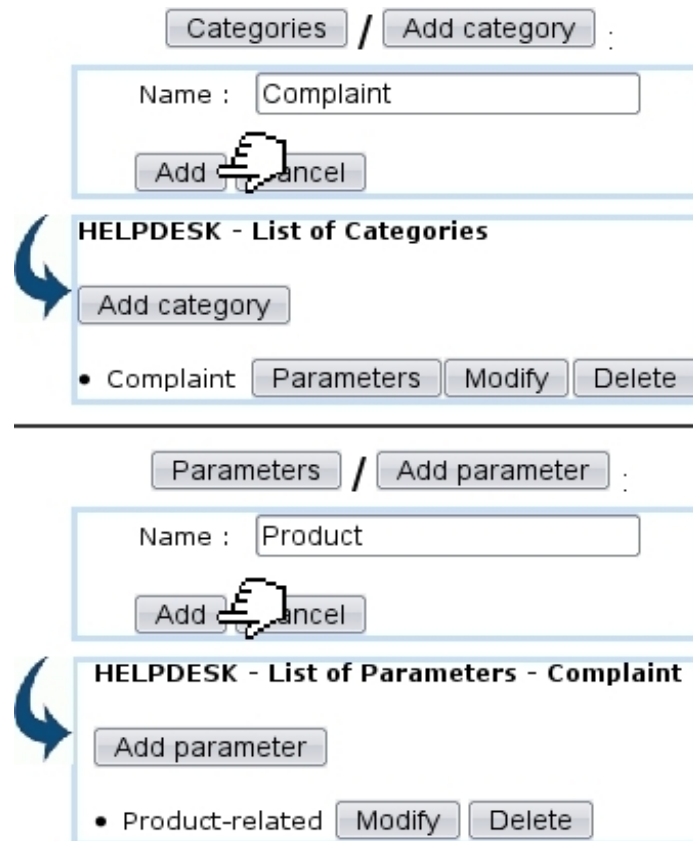
Categories / Add category :

Name : Complaint

Add Cancel

HELPDESK - List of Categories

Add category

- Complaint Parameters Modify Delete

Parameters / Add parameter :

Name : Product

Add Cancel

HELPDESK - List of Parameters - Complaint

Add parameter

- Product-related Modify Delete

Figure A.6: *(Left :)* Creating the 'Complaint' category for the 'Customer' ticket type ; *(Right :)* creating the 'Product' parameter for the 'Complaint' category.

Predefined emails / Add email :

Language : English

Title : compl. being processed

Subject : About your complaint

Header : Dear Sir/Madam,

Text : Your request is currently being processed.

Footer : Kind Regards

Create Cancel

compl. being processed
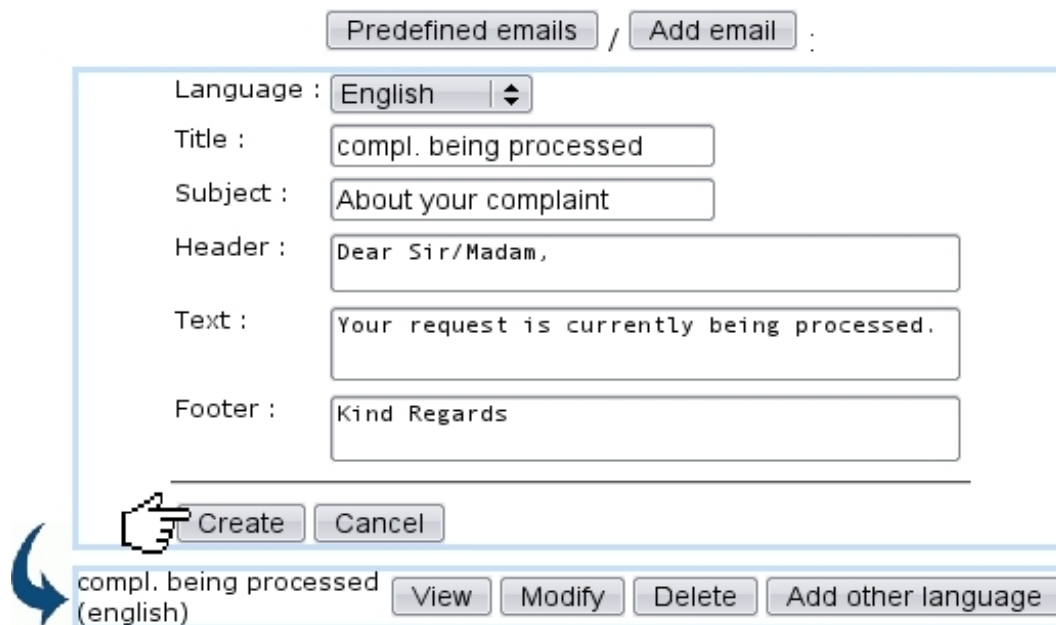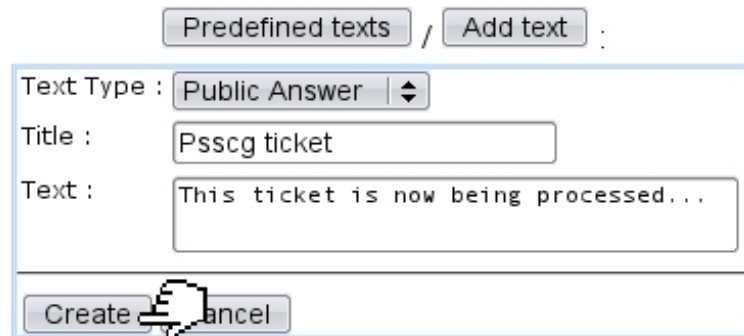(english) View Modify Delete Add other language

Figure A.7: Creating a predefined email to the client meaning that the her/his request is being processed.

been written.

This predefined email can be then called if a notification email is to be sent while at adding an action (8.4).

A.2.2.3   Predefined texts

As shown in Fig.A.8, it is possible to define models of public answers via [Predefined texts] / [Add text]. There, a title under which you want your text to appear is filled in, and so is the text itself.

Figure A.8: Creating a predefined public answer meaning the ticket is being processed.

Once created, with similar buttons as for predefined emails, such a text can be viewed, modified, deleted or redone in an other language.

A.2.2.4 Predefined durations

As featured in Fig.A.9, the eponymous button allows to define durations (8.2.4) to be used while creating a new ticket. For that matter, the relevant ticket type must have its 'Duration:' menu (A.2.1) set to 'predefined'.
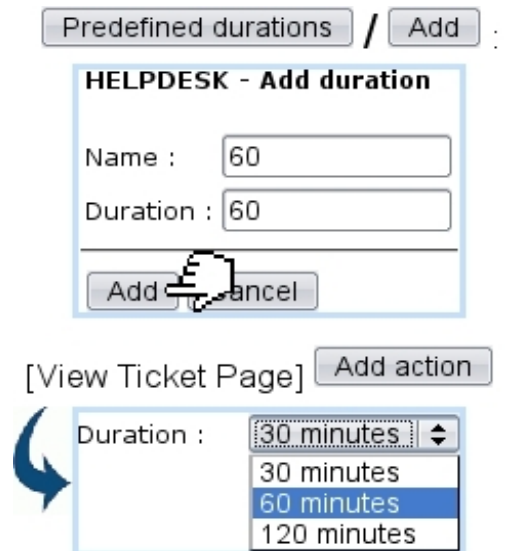

Figure A.9: Creating a predefined ticket duration of one hour. After, when adding an action, this duration will be readily available at the 'Duration:' menu.

A.3 The *List of Ticket Styles Page*

A ticket style is an attribute of a ticket type ; creating a different ticket style for each ticket type is therefore useful to distinguish between them when they are listed in the main *Customer Support Page* (Fig.8.4).

On the *Styles Page* as accessed via [Styles], the creation of a new style is achieved via [Add style], in a process shown at Fig.A.10. Here, we create a style aimed for tickets of the "Supplier" type.

Then, four colours are to be filled, using the Color pop-up as seen in 7.2.2.2 :

- 'BGColor (Default) :' : in the Ticket Table, the default background color of tickets belonging to this type ;

- 'Font color (Default) :' : the default font color of this ticket, both in the Ticket Table and in the *View Ticket Page* (8.3.3) ;

- 'BGColor :' : an optional background color for this ticket type ;

- 'Font color :' : an optional font color for this ticket type.

These two optional colors can be used to make an individual ticket stand out from the others of the same type (see below, Fig.A.12). Thus, for conveniency, it is advised to choose the optional colors pretty similar to the default ones, but a little darker.

Lastly, font size can be defined with a drop-down menu and its style (bold/italic/underlined) via tick boxes.
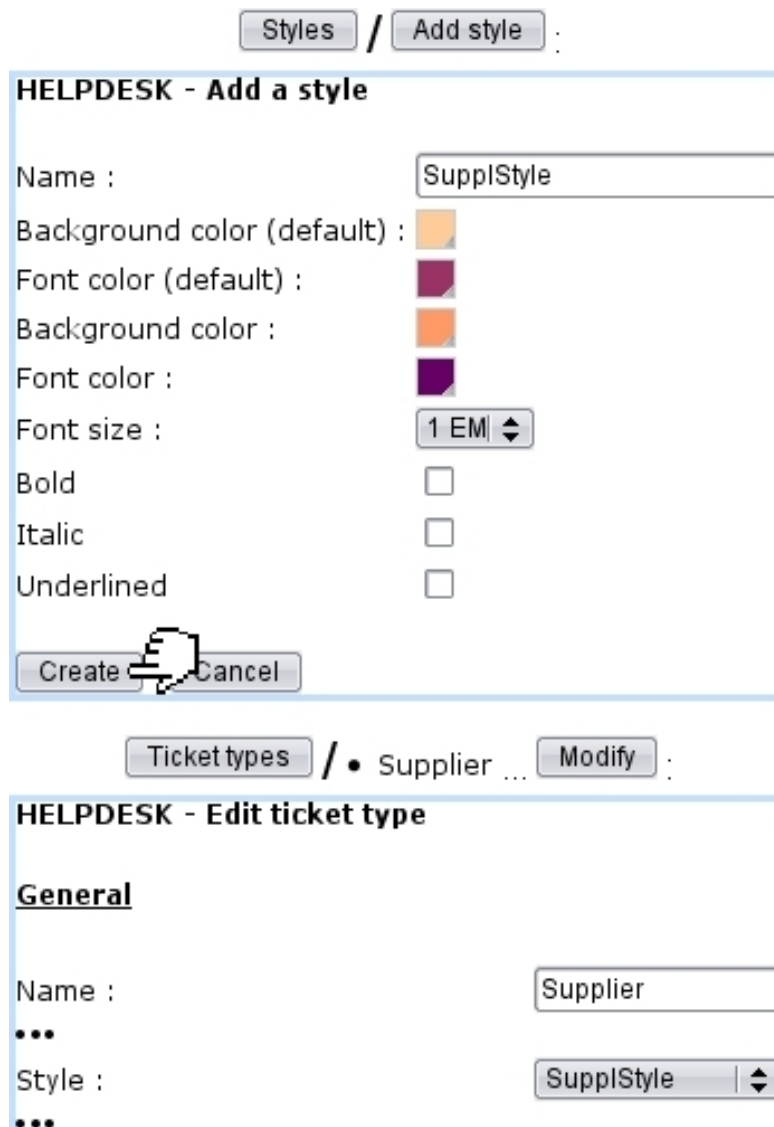

Figure A.10: Creating a new ticket style, aimed for the "Supplier" ticket type ; it is then assessed to this type through the ticket type's page.

The very result of the ticket style of this example is shown at Fig.A.11.

A.3.1   Emphasizing on a certain ticket

By default, on the *View Ticket Page* (8.3.3), the 'Display:' and 'Font:' items are ticked to **default** :

Figure A.11: A ticket of the "Supplier" type, appearing with the style as defined at Fig.A.10.

thus displaying the Default background and font colors as defined at the ticket style creation. It is then possible to untick one or them (or both) to switch to the optional colors. As shows Fig.A.12, this makes this particular ticket stand out amongst tickets of the same type.

Figure A.12: Unticking the 'default' boxes for a particular ticket switches the style to the optional colors and afterwards, in the Ticket Table, makes it be distinguished from the others at a glance.

A.4 The *User Details Page*

On this page as accessed via [Users] and featured in Fig.A.13, a drop-down menu lets you choose the user of whom you want to see the details, Customer Support-wise ; clicking on [Go] will then bring you to a page where you can see and modify :

- the user's options, mainly for Customer Support main page displaying ;

- the user's view mode and assignment mode rights for all user groups ;

- the ticket types the user can see, for every user group this user belongs to.

All of these options are explained below.

Figure A.13: The ticket configuration for a user, mostly ruling view/assignment ticket rights.

A.4.1 Style for user

On this first part, four choices are made :

- if yes or no you want warnings to be sent to the selected user by email ;

- the main *Customer Support Page* (as illustrated at Fig.8.1) Menu View : no search menus at all and no New ticket button ('None'), just drop-down search menus ('Search Criteria'), or all search menus (drop-down ones and client search) and New ticket button ('Client Search') ;

- the Priority Edit : if yes or no the selected user can modify the priority (8.2.5) of a ticket.

A.4.2   Rights for user

This part consists in a list of user groups, and for each of them, two Yes/No drop-down menus for View Mode and Assignment Mode. Click on [Ok] for these two choices to be validated.

For instance, for a user group G :

- setting View Mode to 'No' will prevent the selected user from seeing any ticket created by any user from G ; but, if the creating user also belongs to another group for which 'Yes' has been set, the ticket will be displayed anyway ;

- setting Assignment Mode to 'No' will prevent the selected user from assigning a ticket to any member of G.

A.4.3   Ticket types for user

This part's aim is to decide if the selected user can see any ticket type for the user group(s) she/he belongs to, or just the default one. Indeed, a given user group holds one or several predefined ticket style(s) (for details, see *User Groups Page* below).

Only the user groups the selected user *belongs to* are listed, and for each of them, a drop-down menu lets you pick between 'any' and 'default' ; for instance, if user group G holds three ticket styles (one default, and two others), setting to 'any' will enable the selected user to see all of the three ticket types.

A.5   The *User Groups Page*

As illustrated at Fig.A.14, all user groups (9.4.1) are listed ; in order to set which ticket types a user group will be able to issue, click on [Modify]. On the subsequent page, all ticket types already authorized to the user group will be listed ; if you wish to add another, pick it from the drop-down menu, which conveniently lists tickets types not yet added. Then click on [Add] to validate your choice.

If you want to remove a ticket type from this user group, click on the corresponding [Delete] button. The [Default] button marks the ticket type that will be pre-selected in the 'Type:' while at ticket creation.

A.6   Logical types (In Development)
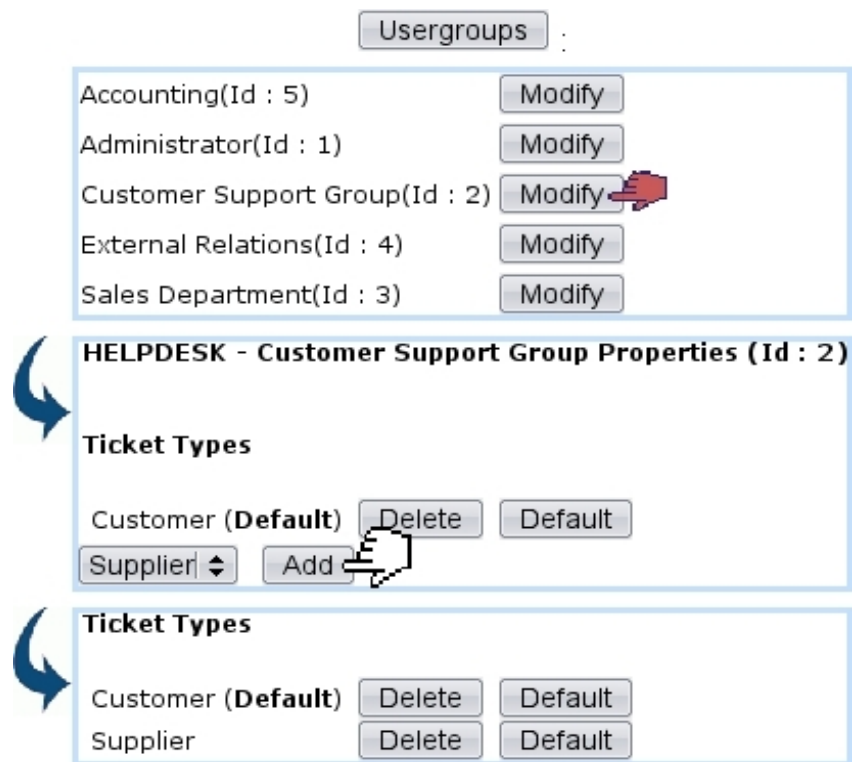
A.7   Public (In Development)

Figure A.14: Giving to the Customer Support user group the possibility to issue tickets of the 'Supplier' type.