

TRAINING



DOKUMENTATION

Training for creating own Workflows in TicketXPert.NET



INHALTSVERZEICHNIS

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- 4 Non Disclosure Agreement

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1 Connection Tickets / Workflows

For the successful creation of own workflows, an understanding of the terms ticket and workflow is necessary.

1.1 Ticket schema

The ticket schema characterizes a certain type of ticket. It is created in the settings area of the TicketXPert surface and defines, among others, the input fields, the assistant and the range of numbers of the ticket.

1.2 Creating a Ticket

Tickets are either created manually or via Mail2Ticket. In the first case, this is done via the ticket assistant; in the latter, a mail is automatically turned into a ticket whereby a mapping of the input fields may take place. A third possibility is the creation of a ticket via a form workflow where a ticket is created at the end of the process.

1.3 Ticket Assistant and Ticket Input Fields

The ticket assistant is used for the manual creation of a ticket. It is the assistant's task to guide the user intuitively through the process of ticket creation and to inquire all the correct information in a structured way, in order to assure that all the data needed for editing the ticket is collected.

TXP-EE offers all possibilities for the creation of such an assistant. The following paragraphs elaborate briefly on the different elements and the detailed steps in the creation of an assistant.

With the end of the assistant, the ticket is created and introduced into the workflow.

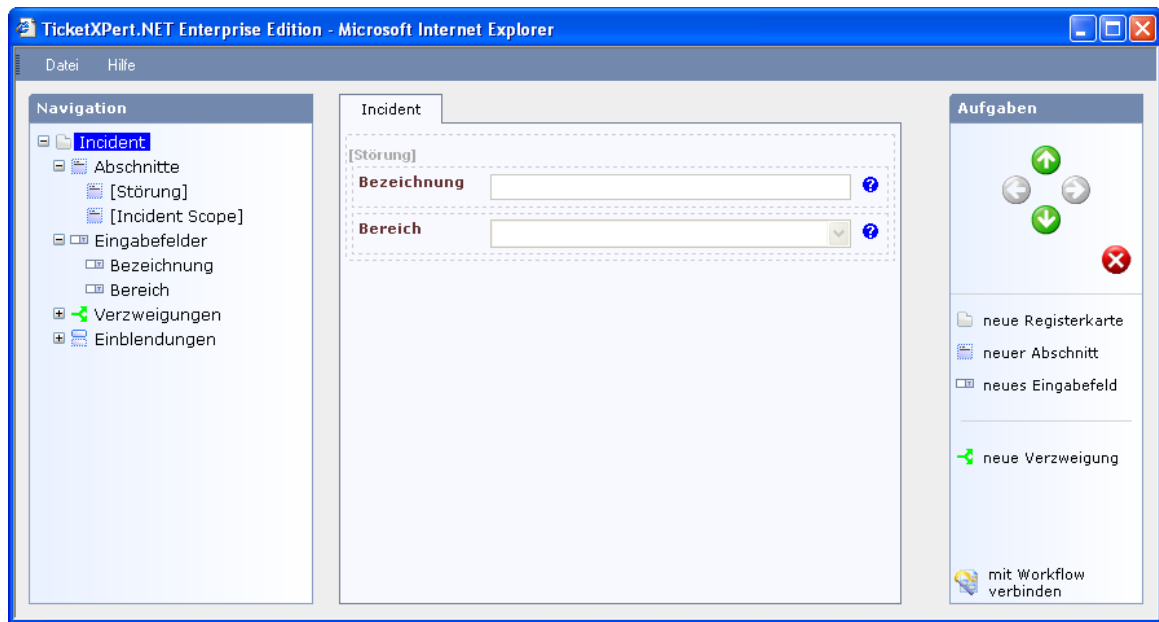
The screenshot shows a web browser window titled "TicketXPert.NET Enterprise Edition - Microsoft Internet Explorer". The main content area is titled "Neues Ticket erfassen" and contains the instruction "Füllen Sie folgende Felder aus.". There are two tabs: "Incident" and "Netzwerkproblem". The "Netzwerkproblem" tab is selected. Below the tabs, there are two main fields: "Bezeichnung" and "Bereich". The "Bezeichnung" field contains the text "Login nicht möglich". The "Bereich" field is a dropdown menu with "Netzwerkproblem" selected. The dropdown menu is open, showing a list of options: "Netzwerkproblem", "Problem mit Arbeitsstation", "SAP-Problem", and "Netzwerkproblem". At the bottom of the form, there are three buttons: "Zurück", "Weiter", and "Abbrechen".

1.4 Creating a Ticket Assistant

The ticket assistant can be freely defined for all types of tickets (ticket schema). For this task, an intuitively usable designer can be used in TXP-EE.

The ticket assistants can be changed afterwards at any time with the help of the designer.

Note: please keep in mind that the already created tickets do not change automatically as well. There is, however, the possibility of updating these "old" tickets.



In the ticket assistant designer it is possible to create tabs with passages that include input fields.

Dependencies between input fields and passages or tabs can be defined. This way, it is possible to branch out to the tab <Network problem> if a certain entry in the list is highlighted (e.g.: in the field Area) (branch). It is also possible to fade in a second passage (fading in) if a certain entry in the list is highlighted (e.g.: in the field Area).

With these two possibilities individual assistants that react to user input and that systematically guide the user through the creation of the ticket can be designed.

The tabs, passages and fields still have to be defined by Sulzer. Imaging and implementing of the necessary assistants, however is relatively easy regarding costs and effort.

1.5 End of Ticket Creation

After the ticket assistant was ended, the ticket is created in the database and is introduced into the workflow. The ticket assistant is not to be confused with the workflow itself, even if the assistant may be designed like a workflow.

1.6 Workflow Activities and Ticket Actions

The correct differentiation of ticket actions and workflow activities plays an important role. Workflow activities are always associated with certain users and are only available at certain places in the workflow, whereas ticket actions can be made available for all users and groups independent from the position of the ticket in the workflow. Basically, ticket actions can be carried out by people who cannot be associated with a workflow activity. Examples of ticket actions:

- Add comment
- Edit input fields
- Upload a file

1.7 Tickets that leave the Workflow

Tickets that leave the workflow, also leave the context of the workflow manager. The tickets themselves, however, stay in the TicketXPert database (generally in the status "closed"). Such a ticket can be re-introduced into workflow through, for instance, reactivation (ticket action).

2 Elements of a Workflow

In this chapter the basic elements of a workflow are explained, together with a brief overview over their application.

2.1 START / END

The start and end plug-in defines the introduction and exit point of a workflow item (ticket) in its workflow. Without the start plug-in no ticket could be started in a workflow.

2.2 Workflow Activities

Workflow activities are requests for certain users. Generally, the process is stopped then, until the user has reacted to the request. In TicketXPert such workflow activities are shown both in the activity list (usual screen setting after the log-in) and in the ticket (under "actions"). Most often the workflow activity includes one or more buttons as possible options for the user.

2.3 Background Actions

The term "background actions" stands for all actions that are carried out by the workflow manager in the background without any action from the user.

Examples of background actions of this type:

- Status modification
- Send message
- Allocation of users and groups
- Carrying out dispatch rules
- Conditional switches
- etc.

2.4 Plug-in Concept

All visible single elements are called plug-ins. This term was chosen because plug-ins can be built in easily via drag & drop in every workflow at every place and because they are plug-ins themselves for the workflow manager. Plug-ins consist of a XML-Definition and mostly of one or more .NET assemblies. New plug-ins can be added to the duration and without stopping the system through simple copying of files and are available as elements for the use in the workflow from now on.

3 Creating a new Workflow

The following guideline supports you during the first steps of the creation of a new workflow.

3.1 Preliminary Considerations

Is a new ticket schema needed?

- ✓ Is the new workflow supposed to be an independent workflow?
- ✓ New assistant?
- ✓ Other ticket fields?
- ✓ New range of ticket numbers?

If one of these points is relevant, a new ticket schema should be created first. During the creation of the new ticket assistant necessary ticket fields probably arise automatically and can be created automatically, so that the manual creation of ticket fields is often not necessary at all.

3.2 Create Workflow

Start your new workflow with the "start" plug-in. Then go on with assigning a status (e.g.: status "new") and allocate the ticket to a group. The direct allocation to a static user is not recommendable, since then the workflow itself would have to be adapted in case tickets should no longer be allocated to that user at a later point of time - either intermittently or permanently. For a maximum of flexibility the dispatch module can be used for the allocation with users or groups (if licensed).

As soon as the ticket has a status and a group or a user, it is listed in the ticket list of the TicketXPert surface (if the logged-in user is authorized to see the ticket). If the ticket is allocated to a group, generally the draft pattern "ticket acceptance" is recommended. With the ticket acceptance it is ensured that exactly one user of the group receives the ticket and all following workflow activities. It often causes confusion if other workflow activities than "Acceptance" are allocated to all group members at once.

The plug-in "Acceptance" has two exits: "Accepted" and "Rejected". A ticket is classified as accepted, as soon as the first member of the group accepts it. In this case all workflow activities disappear at all other group members and this user is booked as owner. The ticket is seen as rejected if all group members

have rejected the ticket. Only then the ticket comes to the exit "Rejected". Often a protocol entry is written and the ticket is immediately to the group again for acceptance. An e-mail message would also be possible. After the ticket was accepted, the user booked as owner has to be listed as true owner of the ticket. This is done via the plug-in "User allocation".

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