



# Trouble Ticket

For Palm OS Handheld Devices

# Contents

<b>INTRODUCTION.....</b>	<b>1</b>
Issue Management.....	1
Application Design.....	1
<b>INSTALLATION.....</b>	<b>4</b>
Trouble Ticket Application.....	4
Option: Sample Database File.....	5
<b>RUNNING TROUBLE TICKET.....</b>	<b>6</b>
<b>REQUIREMENTS &amp; LIMITATIONS.....</b>	<b>7</b>
System Requirements.....	7
Limitations.....	7
<b>APPLICATION USAGE.....</b>	<b>8</b>
Adding A New Record.....	8
Viewing Existing Problems.....	10
Escalation of Issues – Follow-Up Action & Resolution.....	12
Record Deletion.....	13
Beaming Records to Other Trouble Ticket Users.....	13
<b>GOTYPE! KEYBOARD SUPPORT.....</b>	<b>15</b>
List View Screens.....	15
Individual Record Screens.....	15
<b>KNOWN ISSUES.....</b>	<b>16</b>
<b>LICENCE AGREEMENT.....</b>	<b>17</b>
LICENCE TERMS AND CONDITIONS.....	17
WARRANTIES, WARNING, DISCLAIMER.....	17

## **INTRODUCTION**

Trouble Ticket for Palm OS Handhelds is an application designed to capture Help Desk reports and to follow those reports to resolution, whether successful or unsuccessful.

The application is designed to be open enough to not restrict it to use in I.T. environments. A building superintendent, for example, could use Trouble Ticket to keep track of problems that occur in his buildings. The scope of usage is almost boundless.

## **Issue Management**

The application design is based on the following ideas with respect to issue management:

1. All information with respect to an issue should be recorded in as much detail as possible. Proper recording of the initial problem allows the Help Desk attendant, or the engineer receiving the problem report to make a proper assessment at first reading. Proper recording at every level allows for proper action at subsequent levels of escalation.
2. Any problems should be resolved after at most two degrees of escalation. If a problem is not resolved after two degrees of follow-up, it is an indicator of a misdiagnosis of the original problem, or of improper action at escalation. In either case, a problem needs to be reviewed and reopened as a new problem.
3. Resolutions of all problems are to be properly recorded on closure. This will assist in the diagnosis and treatment of similar problems that may occur later.

## **Application Design**


The application serves as a data capture, structured to meet the requirements of issue management outlined above. There are two types of views – List views and individual record views. Details of these are outlined below.

**List Views**

The application provides the facility for viewing the list of reports by issue reporter, location of the issue, and summary of the problem. Each list also includes the date on which the problem was reported, and a status indicator (Yes/No or Blank) to show whether the problem has been resolved.

Reporter,

TROUBLE TICKET		
Joe Bloke	1/12/00	Yes
Mary Jane Ross	2/12/00	Yes




Location, and

TROUBLE TICKET		
Park Street	1/12/00	Yes
Main Office	2/12/00	Yes



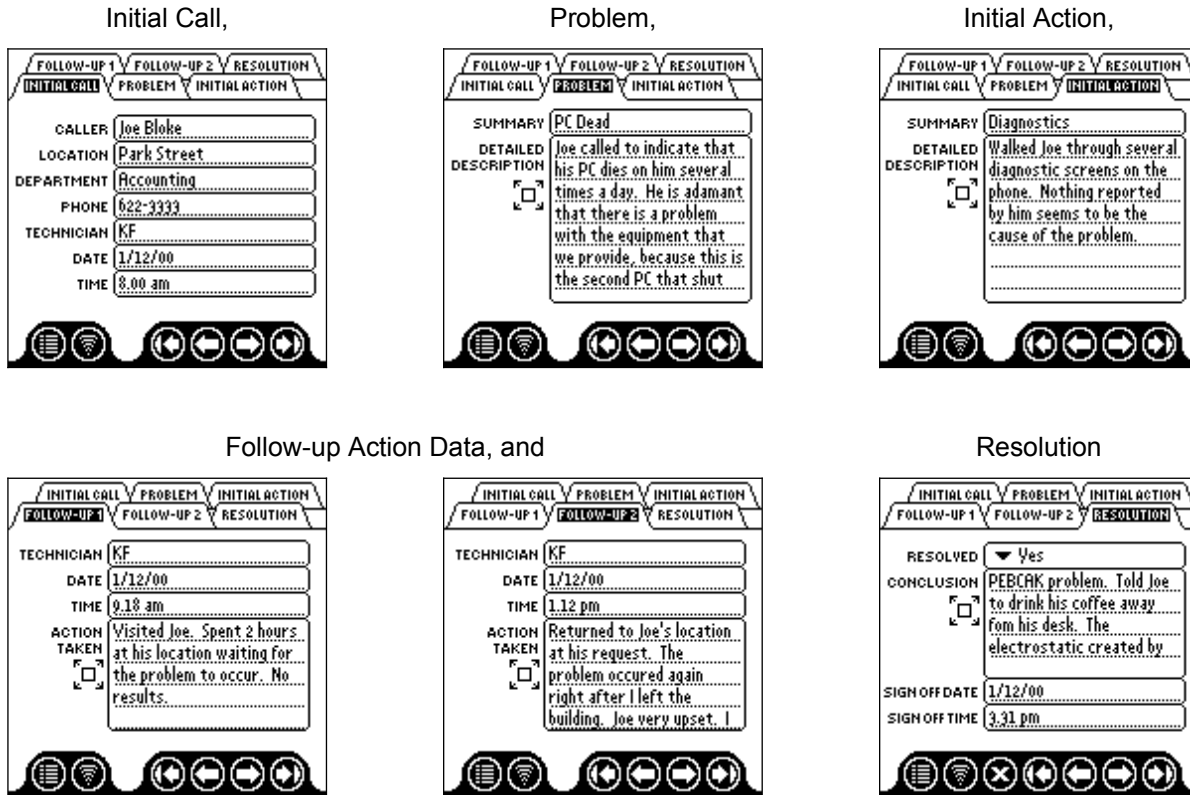
Problem Summary.

TROUBLE TICKET		
PC Dead	1/12/00	Yes
Equipment broken	2/12/00	Yes



**Individual Record View**

Individual issues are presented in a tabbed layout, with grouping of relevant data items. Initial report data, first action, and follow-up and resolution information are all captured and viewed on their own tabs in a single screen.



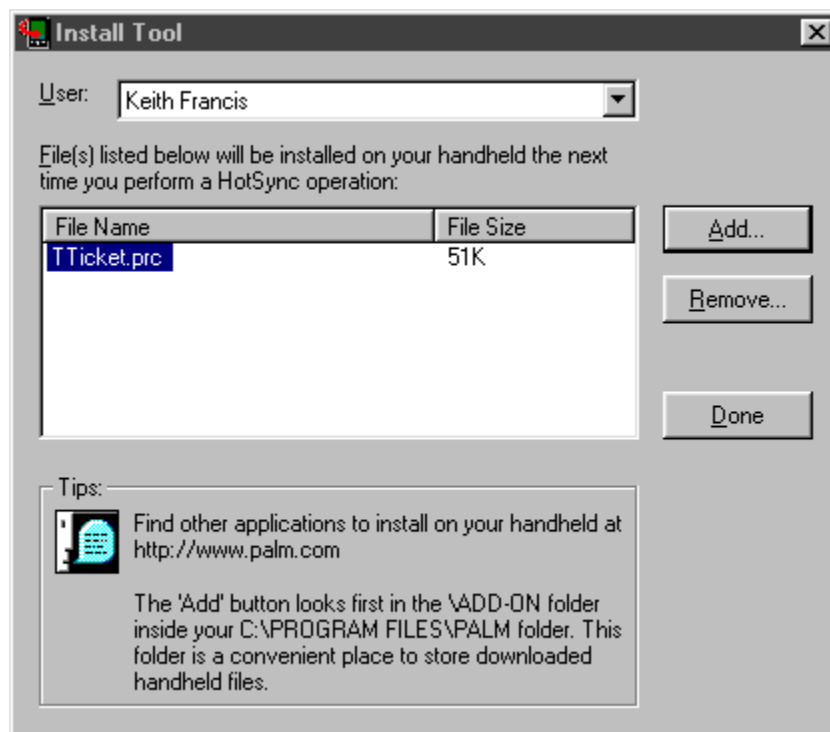
## INSTALLATION

The package contains the following files:

1. TTICKET.PRC – The Trouble Ticket Application
2. MANUAL.DOC – This document.
3. READMEPALM.TXT – README file and Quick Start Instructions.
4. TROUBLEDB.PDB – Sample Trouble Ticket database file.

### Trouble Ticket Application

1. Open the downloaded self-extracting Zip file and extract all the files to the specified directory, or to one of your own choice.
2. Use the Palm Install Tool to load the Trouble Ticket application onto your Palm device. The Palm Install Tool can usually be found under Palm Desktop on the Start menu. Click the Add button and locate the directory where you copied the Trouble Ticket files. Select the file TTICKET.PRC and click the Done button.



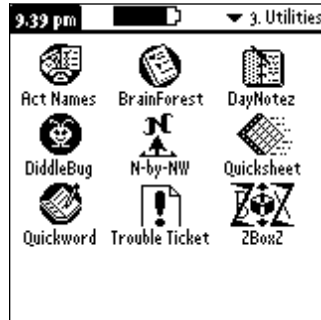
3. Place you Palm device in its cradle and perform a HotSync. The Trouble Ticket application is now installed on your handheld and ready for use.

**Option: Sample Database File**

The download also contains a sample database file, TROUBLEDB.PDB, with two example problems. This may be installed in the same manner as the application above.

## RUNNING TROUBLE TICKET

Tap the Trouble Ticket icon to start the application.



Trouble Ticket will open in the Caller List screen.

If you have installed the sample database, you will have two callers listed in the Caller List View screen. These two records can be viewed and edited at your leisure.



## **REQUIREMENTS & LIMITATIONS**

### **System Requirements**

Palm OS 2.0 or greater.

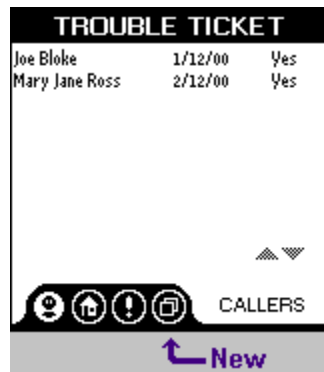
### **Limitations**

Limitations of applications generated with PDAToolbox v2.1beta apply.

## APPLICATION USAGE

### Adding A New Record

From any of the List views, tap the New button.



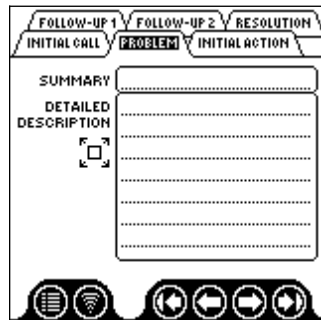
A new issue view screen will open.



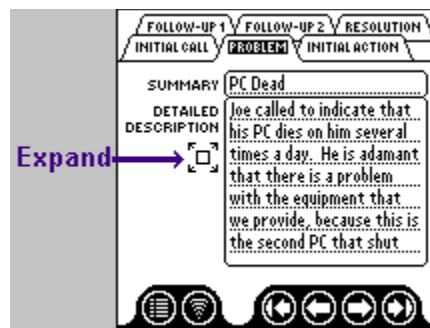
Tap on the fields indicated in the table below to activate them in turn, and enter data as specified in the table below.

Field	Data
Caller	Name of person calling in the problem or issue.
Location	General location of the problem occurrence, e.g. Main Street Branch
Department	Specific location of problem occurrence, e.g. Accounting Dept, Floor 3
Phone	Contact detail for caller. This can be a full phone number, extension number or even an e-mail address.
Technician	Identifier of the person taking the report. This can be a full name, initials, or an employee code.
Date	Date on which the problem was reported.
Time	Time at which the problem was reported.

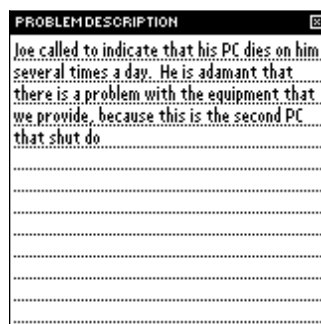
Tap on the Problem tab, and enter a problem description on the tab.



If the 'Detailed Description' field proves to be too small to record a full description, tap on the Expand button to its left.



This opens a full screen for entry of the description.



Tap on the 'X' in its top right corner to return to the Problem tab.

In most cases, initial action can be advised over the phone with the caller. In this case, the initial action will be recorded on the Initial Action tab. Tap on this tab to go to it for the current record.



Enter a summary of the action, and a full description of the action taken in the Summary and Detailed Description fields. If the 'Detailed Description' field proves to be too small to record a full description, tap on the Expand button to its left. This opens a full screen for entry of the description, similar to that provided for the Problem Description. Tap on the 'X' in the top right of this screen to return to the Initial Action Tab.

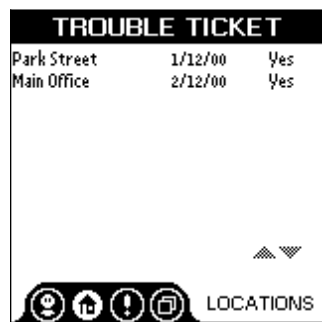
Tap on the List View button to return to the List View.



You should see your new problem listed on each of the three List View Screens.

## Viewing Existing Problems

From any of the List View Screens, tap on the line containing the problem that you want to view.

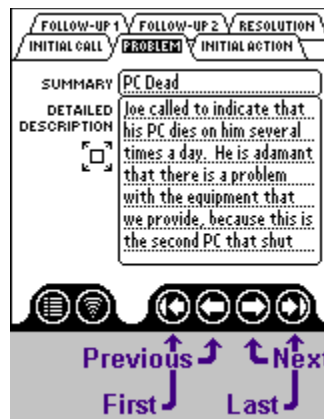


For example, tapping on the line with “Park Street” from the Locations tab will open this problem’s record on the Initial Call tab.

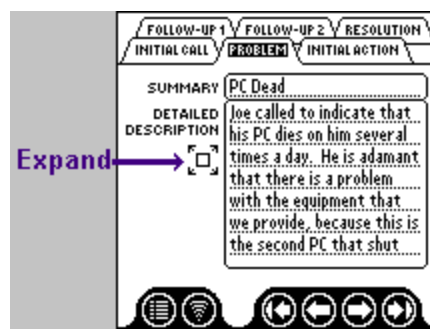


Tap on the tabs at the top of the screen to view the contents of each tab.

Tapping on the four arrow buttons at the bottom of the screen will take you to the first, previous, next or last record in the database.



If any of the memo type fields contain more information than can be viewed on the tab, tapping on the Expand button – the square with the four arrows – next to these fields will all more of the text to be viewed.



Tap on the List View button to return to the Caller list view.

## Escalation of Issues – Follow-Up Action & Resolution

### Follow-up Action

To enter follow-up action information on a problem, select the problem on a List View screen, or navigate to the problem on the record screens.

Tap on the appropriate follow-up tab. If no action of this degree has been completed, the fields on the tab should be blank.

Tap on the Technician field to activate it and enter the name or identifier of the technician who is performing the follow-up action.

Enter the date and time of the follow-up action.

Enter the action taken at this degree of escalation. If this will not fit in the space on the tab, tap on the Expand button to use a larger editing area. Tapping on the 'X' in the top right corner of the expanded screen will take you back to the follow-up screen.

### Resolution

The resolution report screen needs to be filled out in either of the following scenarios:

1. The problem is solved after initial action or some degree of follow-up, or
2. The problem is not resolved after two degrees of follow-up.

Select the problem to be updated.

Tap on the popup indicator in the Resolved field and select 'Yes' or 'No', indicating whether the problem has been resolved or not.

Tap on the Conclusion field and enter the conclusion report. Tap on the Expand button if you require more room to enter the conclusion.

Enter the date and time that this particular issue was closed.

## Record Deletion

To delete a problem record, select that record on a List View screen, or navigate to the record on the record screens.

Tap on the screen's Resolution tab to go to that tab.

Tap once on the Delete button.



The record is now deleted.

**NOTE:** You will not be asked to confirm deletion of the record.

## Beaming Records to Other Trouble Ticket Users

Trouble Ticket users can beam individual tickets to another user.

On a list view screen, select the record to be beamed. Alternatively, navigate to the record to be beamed on the individual record screens.

Tap the Beam button on any of the record's tabs to commence the beaming operation.

	FOLLOW-UP 1	FOLLOW-UP 2	RESOLUTION
INITIAL CALL	PROBLEM	INITIAL ACTION	
CALLER	Joe Bloke		
LOCATION	Park Street		
DEPARTMENT	Accounting		
PHONE	622-3333		
TECHNICIAN	KF		
DATE	1/12/00		
TIME	8:00 am		

Beam

The receiving user will be asked if they want to receive the record. They should indicate 'Yes'.

The application will open and attempt to display the record. The receiver of the beamed record should close Trouble Ticket by returning to the Applications screen, and then reopen Trouble Ticket.

The beamed record will now appear in their List Views, and can be edited and viewed in the Individual Record View.



## GOType! KEYBOARD SUPPORT

The application now features limited shortcut command keys for the GoType! Keyboard.

### List View Screens

Keystroke	Action
Command-Alt-C	Go to Caller List View
Command-Alt-L	Go to Location List View
Command-Alt-P	Go to Problem List View
Command-Alt-N	Create new record

### Individual Record Screens

Keystroke	Action
Command-Alt-1	Go to Initial Call tab
Command-Alt-2	Go to Problem tab
Command-Alt-3	Go to Initial Action tab
Command-Alt-4	Go to Follow-up 1 tab
Command-Alt-5	Go to Follow-up 2 tab
Command-Alt-6	Go to Resolution tab
Command-Alt-M	Go to first record
Command-Alt-, (Comma)	Go to previous record
Command-Alt. (Period)	Go to next record
Command-Alt-/ (Slash)	Go to last record
Command-Alt-N	Go to Caller List View
Command-Alt-D	Delete record (Resolution Tab only)

## **KNOWN ISSUES**

1. No Confirmation is requested when deleting a record.
2. When a beamed record is received, the receiver must close and open his Trouble Ticket application to view and edit his database.
3. There are no scrollbars on memo-type fields.
4. The application does not respond to the global Find on the Palm OS device.

The above limitations are inherited from the development environment. These will be addressed in minor version updates as they are addressed in the development environment.

5. Use of DaggerWare's MenuHack prevents access to the tabs in the individual record screen. When you tap on the tabs, the menu will pop up instead. Deactivate MenuHack before attempting to use Trouble Ticket. It is unknown how Trouble Ticket will behave in OS3.5, as tapping on an application's title bar to drop the menu is a feature in OS3.5.x.

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