

Evan's Tech Support
Work Order System
Official Manual

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Evan's Tech Support

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1. Purpose

Evan's Tech Support Work Order System was created with the user in mind. Many work order systems have become bloated with so many unnecessary features that the original purpose has been long forgotten. A work order system should provide an easy to understand means of entering requests for work to be completed and followed up on. That is exactly what this system does. In an attempt to keep the system efficient and user friendly, pages have been reduced to bare minimums. Editing users is as simple as clicking on a username and editing fields while updating a work order only requires a click to view and a click to submit a note.

2. Basics

This work order system allows for an unlimited number of Administrator as well as User accounts for each organization. In order to manage an Organization, an Administrator account must be used. To log in to an Administrator account, go to <http://admin.electronics4dummies.com/>. The Administrative console can also be reached via hyperlink at the bottom of the user account login page at <http://www.electronics4dummies.com/>. To submit work orders, one must log in to the User Account Login Page located at <http://www.electronics4dummies.com/>.

3. Administrative Console

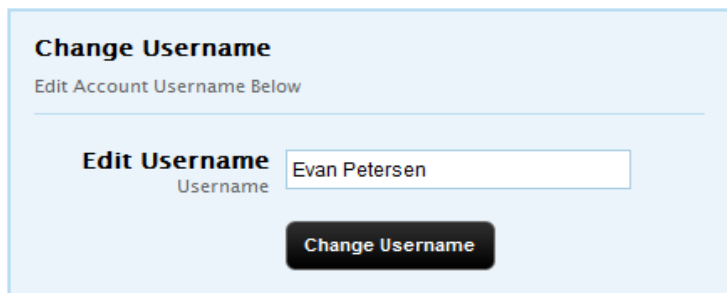
As described in Basics, one must log in to the Administrative Console to manage an organization. Once logged in, the Administrator will be presented with a list of user accounts and a navigation bar on the left side of the page.

3.1 Edit Users

The first listed entry, “Edit Users”, is the page that you are presented with immediately after logging in. The list of user accounts is interactive and will respond to a single left click. You can sort the table or click on a specific user account to both view additional information as well as edit individual user accounts. To edit a user account, overwrite the information contained in the region that you wish to edit and click the respective update button. Note that you may only edit one section (as defined by a blue box) at a time.

3.1.1 Change Username

To change a user’s username, edit the text box labeled “Edit Username” and click the “Change Username” button (See **Figure A**). The supplied username



The screenshot shows a light blue rectangular form. At the top left, it says "Change Username" in bold. Below that, in smaller text, it says "Edit Account Username Below". There is a horizontal line. Below the line, on the left, it says "Edit Username" in bold, with "Username" in smaller text below it. To the right of this text is a white text input box containing "Evan Petersen". Below the input box is a black button with white text that says "Change Username".

Figure A: Changing a Username
Source Evan Petersen

must be at least four characters in length and must be unique. No two user accounts from the same Organization are allowed to share the same username. After clicking “Change Username”, a green or red status will appear above the text “Change Username”. If the operation was successful, the text will be green and read “Success!” If the text is red, an error was discovered with the submission and the edit has not been accepted. Make sure that the supplied username has not already been taken and that it is at least four characters long.

3.1.2 Change E-Mail Address

To update a user's e-mail address, edit the text box labeled "Edit E-Mail Address" (See **Figure B**). The supplied email address must be a

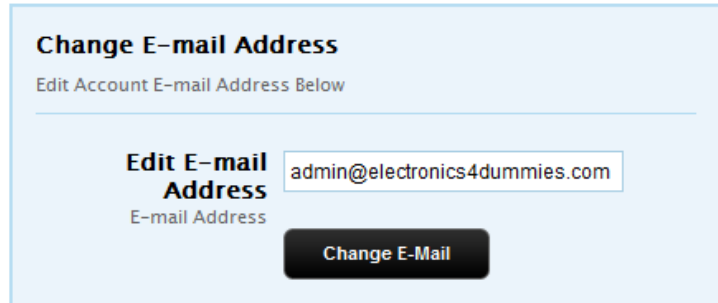


Figure B: Changing an E-Mail Address

Source: Evan Petersen

valid address as defined by RFC 2822. To save changes, click the black box labeled "Change E-Mail". If the supplied email address is accepted, green text reading "Success!" will appear above "Change E-mail Address". In the event of a problem, red text will appear stating that the E-Mail address is malformed.

3.1.3 Change Location Lock

This work order system allows Organizations to organize users into "Sites". The intended purpose for this feature is to allow organizations to separate work by location and assign users to specific locations. To assign a user to a specific

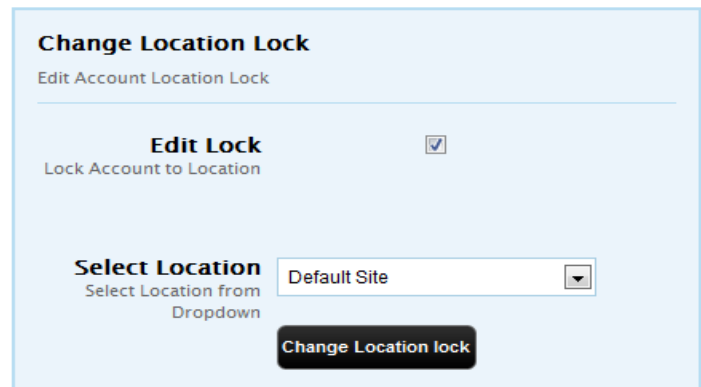


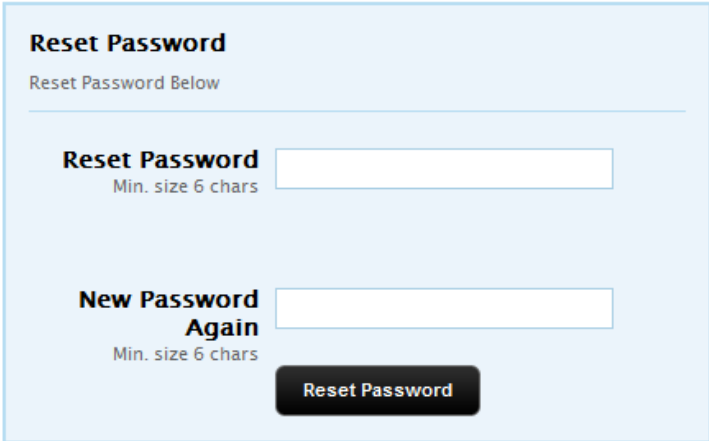
Figure C: Changing a Location Lock

Source: Evan Petersen

location, check the "Edit Lock" checkbox and then select the corresponding site and click "Change Location Lock" (See **Figure C**). To add locations or identify which users are assigned to specific locations, see **MANAGE SITES**.

3.1.4 Reset Password

To reset a user's password, scroll down to the box titled "Reset Password" (See **Figure D**). Enter a new password for the user that is at least 6 characters in length. Reenter the



password in the text box titled "New

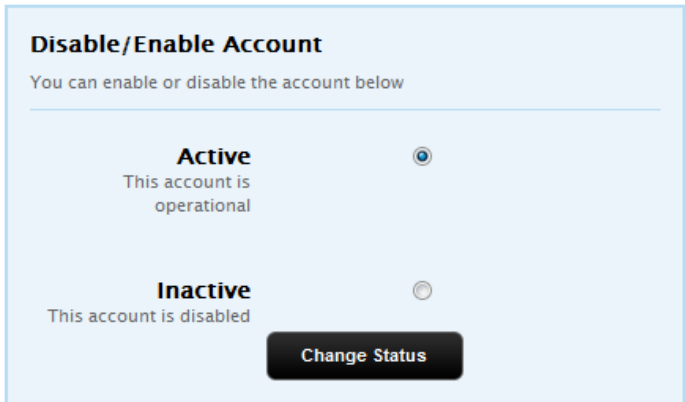
Figure D: Resetting a Password

Source: Evan Petersen

Password Again". Once you have reentered the new password, click the button "Reset Password". If there are no problems with the new password, a message will appear saying "Success!" in green writing. If there is a problem, red writing will appear alerting you that something went wrong. If this is the case, try a different password and be sure to copy it exactly into the "New Password Again" text box.

3.1.5 Disabling/Enabling User Accounts

To suspend a user's log on privileges, click the radio button titled "Inactive" and then click "Change Status" (See **Figure E**). The user-account will still exist; however, the user will no longer be able to log on.



Should you wish to grant the user account logon privileges, select the "Active" radio button and then click "Change Status".

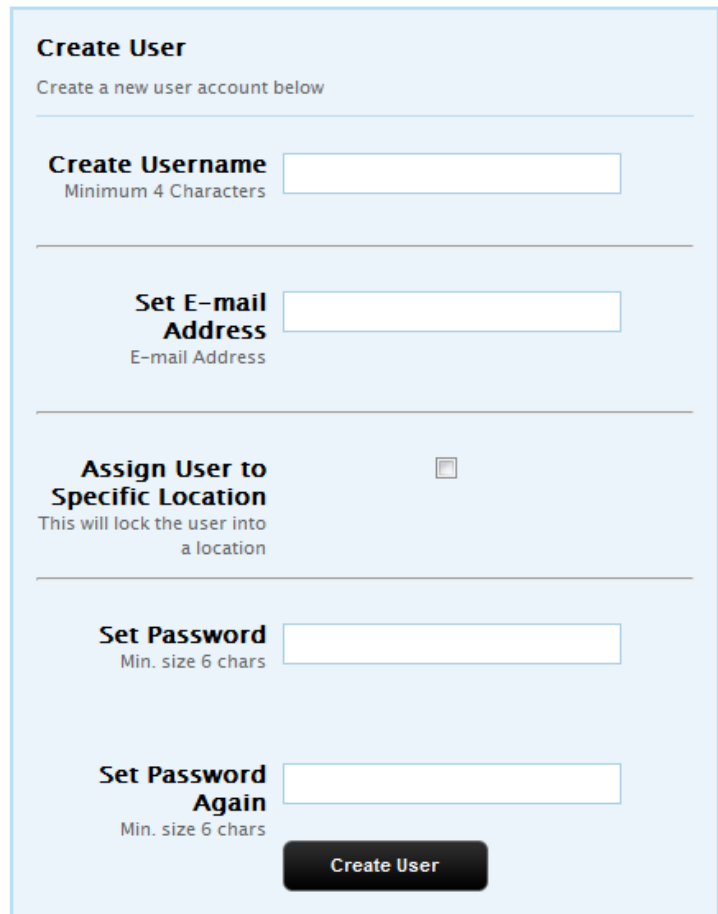
Figure E: Disabling/Enabling an Account

Source: Evan Petersen

3.2 Creating Users

To create a new user, click “Create Users” on the left navigation bar. You will be presented with a form titled “Create User” (See **Figure F**). You can then choose a username for the new account. Spaces are allowed and the length of the username must be greater than or equal to four characters in length. You may then enter the e-mail address for the user account. Anytime a work order is created or modified that concerns the particular user, an e-mail will be sent to the e-mail address on file. You can then decide whether or not you wish to assign the user to a particular location or group. By assigning them to a specific location, the user will only be

able to see and create work orders for that particular site. To manage the locations available, click “Manage Sites” from the navigation bar. The next and final step to creating a user account is choosing a password for the user. The user will be able to change his or her password at any time after the account has been created. The only restriction is that the password must be at minimum 4 characters in length, spaces included. Finally, click the “Create User” button. If the form was filled out correctly, green text will appear indicating that the creation of the account was successful. If there is a problem with the input, red text will appear stating the problem and how to fix it.



The screenshot shows a web form titled "Create User" with the instruction "Create a new user account below". The form is divided into several sections by horizontal lines:

- Create Username:** A text input field with the label "Create Username" and a sub-label "Minimum 4 Characters".
- Set E-mail Address:** A text input field with the label "Set E-mail Address" and a sub-label "E-mail Address".
- Assign User to Specific Location:** A section with the label "Assign User to Specific Location" and a sub-label "This will lock the user into a location". It contains a single checkbox.
- Set Password:** A text input field with the label "Set Password" and a sub-label "Min. size 6 chars".
- Set Password Again:** A text input field with the label "Set Password Again" and a sub-label "Min. size 6 chars".

At the bottom right of the form is a dark button labeled "Create User".

Figure F: Creating a User

Source: Evan Petersen

3.3 Managing Sites

To manage the list of sites or view the association of users to site, click “Manage Sites”. A table indicating the list of sites and the users assigned to each site will appear (See **Figure G**). To create a

Site ID	Site Name	Assigned Users
1	Default Site	
4	Hedrick	
2	site a	Bob1 cheryl Joe1
3	site b	Sally

Figure G: Site Overview
Source: Evan Petersen

new site, edit the text field named “Site Name” and then click “Create” (See **Figure**

Figure H: Creating a Site
Source: Evan Petersen

H). You will now be able to assign users to the newly created location. Additionally, users not assigned to a particular site will be able to create work orders for the new site.

3.4 Search Tickets

To search for work orders, click “Search Tickets” on the navigation bar. You can either input a specific ticket’s ID number or perform an advanced search.

3.4.1 Search by Ticket Number

If you know the exact ticket ID number, you can use the first search option. After entering the ticket number, click search (See **Figure I**). If there is a ticket with that particular ID number,

you will be brought straight to the ticket where you can view additional details. The following items will be present: Ticket Number, who submitted the work order, the status, the date and time submitted, the site that the work order relates to, the room number, and the user's request.

Figure I: Searching by Ticket Number

Source: Evan Petersen

3.4.2 Advanced Search

To search for tickets using modifiers, scroll down to the “Advanced Search” box. You can enter a description of the ticket, the status, and a time window. Once you have finished inputting information to each of the desired modifier text boxes, click search (See **Figure J**). You will be brought to either a list of work orders, or a page stating that no records were found. Assuming that work orders were found, you

will see a table of work orders color coded to denote whether they are open, closed, or have a special status. To view additional details about a specific work order, you can click on it.

Figure J: Advanced Search

Source: Evan Petersen

3.5 All Tickets

To view all tickets, click “All Tickets” on the navigation panel. This is functionally equivalent to running an advanced search with no modifiers selected. You will be brought a page of work orders, each color coded to indicate whether they are open or closed. In the event that there are more than 20 work orders found, an additional navigation bar will appear allowing you to select different pages of 20 work orders at a time sorted by date.

3.6 Open Tickets

To view all “Open Tickets”, click “Open Tickets” on the navigation bar. It should be noted that this is also functionally equivalent to performing an advanced search with the “Open Tickets” feature selected. You will be brought to a table listing all open work orders. All work orders listed will be red so as to indicate that they are still “Open Tickets”.

3.7 Closed Tickets

To view all “Closed Tickets”, click “Closed Tickets” on the navigation bar. You will be brought to a table of green work orders so as to indicate that they are closed. To view additional details about individual work orders, click on them and you will be brought to page about that specific work order.

3.8 Exporting Work Orders

To save a search of work orders in Excel© 2007 format, perform an advanced search or click Open, Closed, or All tickets. Scroll to the top of the window and click “Export” (See **Figure K**). You will then be prompted to save the file. It is recommended that you create a folder for exported work orders. Each time you export a work order, the file name will reflect the username of the person currently logged in and the date followed by the time. This will allow you to easily keep track of which export was created when. After opening the file, you will see what criteria were used to generate the export, the user that generated the export, and each ticket that was returned from the search. The page has been automatically formatted to be printed to an 8 ½” x 11” sheet of paper in landscape orientation. No style modifications are necessary to ensure that there is no spillover of work orders to other sheets of paper.

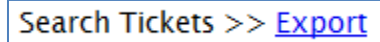


Figure K: Export Tickets

Source: Evan Petersen

4. User Console

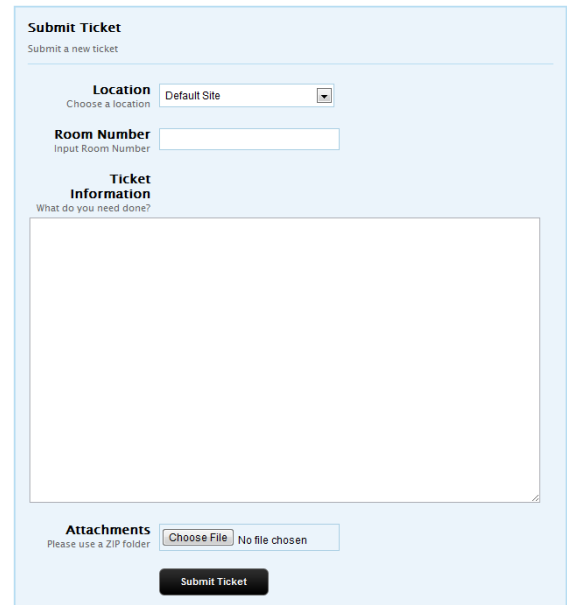
The user console is meant to be used by end users to submit work order requests. These requests will be viewable by technicians upon submission. Users will be able to create work order requests, search through past work orders and manage account information such as their password and e-mail address. Based upon the user's location lock, e-mails will be sent as soon as work orders are submitted about that user's site. If the user has not been locked into a particular site, they will receive a message every time a work order is submitted.

4.1 User Panel

When a user logs in, he or she will be presented with a table of work orders that they have submitted in order of newest to oldest descending. The work orders will be color coded depending on the status of the ticket. Red for open, green for closed and purple for special status. To view comments from a technician, click on a ticket. If the technician has left a comment, it will appear below the "Request Details". If the technician has asked you to or if new information has come to light, you may append your original ticket by filling out the "Append Ticket" form listed underneath the ticket's "Request Details". Your amendment will appear directly below your initial "Request Details" entry along with a time stamp.

4.2 Submit a Ticket

To submit a new ticket as a user, click “Create Ticket” on the navigation bar. If you have not been locked to a particular location, you will be able to choose your own site for the location of the work order (See **Figure L**). The room number should correspond with the location of the request and can include both numbers and letters. The ticket Information box is where the information about the nature of the work order should be put. Try to give as much detail as possible about the work order. If you feel it is helpful, you can attach a zip folder to the work order which the technician assigned to the ticket can view. Finally, click “Submit Ticket” and if the ticket is accepted without error, “Success!” in green will appear at the top of the page. For further verification that the work order has been successfully submitted, click “Open Tickets” on the left panel and check for the work order that you just submitted.



Submit Ticket
Submit a new ticket

Location
Choose a location: Default Site

Room Number
Input Room Number

Ticket Information
What do you need done?

Attachments
Please use a ZIP folder: Choose File No file chosen

Submit Ticket

Figure L: Creating a Work Order

Source: Evan Petersen

5. Glossary

Administrator... Administrators are users with additional privileges. These privileges include creating new users and sites, updating users' information and preferences including but not limited to passwords, email address, name, and assigned site.

Organization... The group of users and administrators that manage a particular work order account.

Request Details... Request details make up the majority of a work order request. This is where the user will explain what they need and or want a technician to do.

Sites... In order to effectively organize users into manageable groups, the feature "Sites" has been implemented. Administrators can create sites and then assign specific users to them. When a user assigned to a specific site submits a work order, the site that they are assigned to will show up on the work order. Any other users assigned to that site will be sent emails detailing the new work order.

Ticket... A work order record containing information such as date created, username, work order details and technician comments (if any are present).

User... A type of account that allows for the submission of work orders as well as searching the work order database. A user's scope can be limited to a specific site by an Administrator.