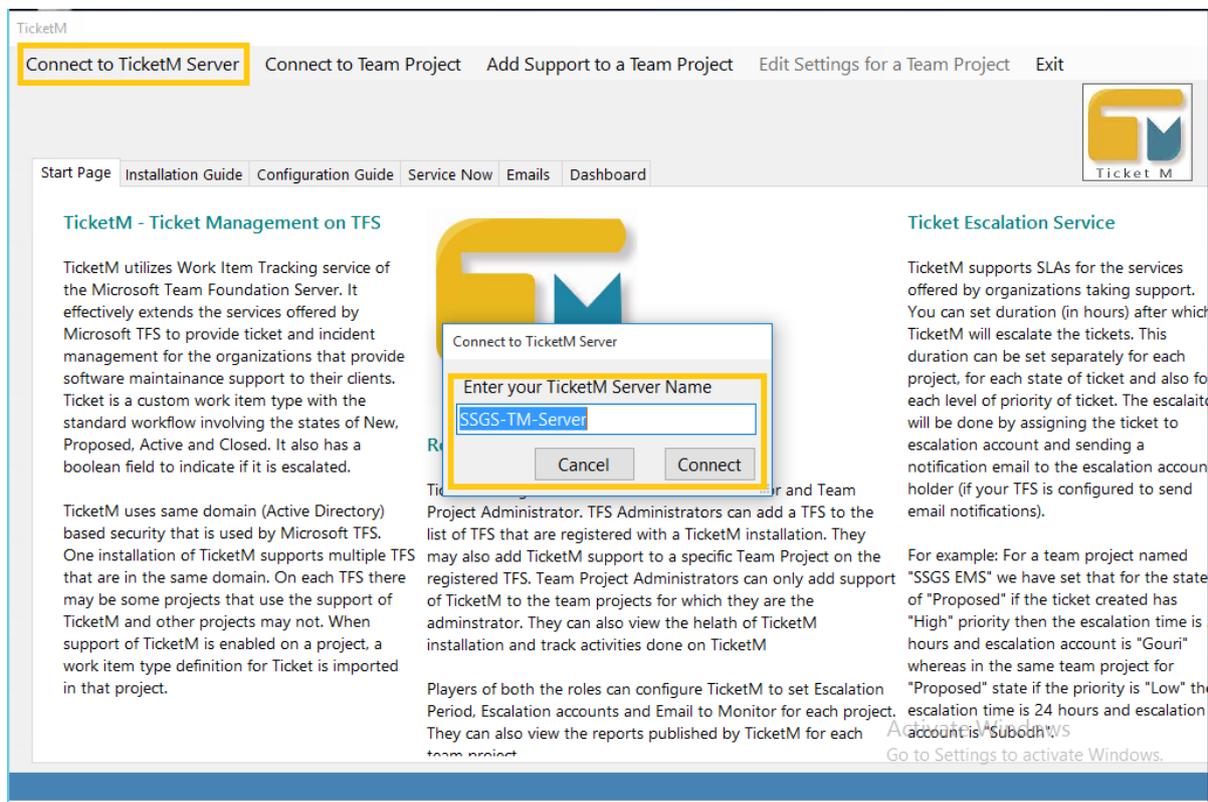


# TicketM User's Manual

## Connect to TicketM Server

TicketM service is installed on a computer in your network that can access the TFS for processing the escalations. To begin configuration of TicketM, you need to first select that TicketM server machine so that the configuration changes will be stored on that. All configurations will be commonly available for all the instances of TicketM Client in your network. For example, TFS once added to the supported list from one TicketM Client, will be available from all client machines. To identify your TicketM Server, click on the menu item "Connect to TicketM Server". If you have connected to a TicketM server earlier, the name of that server will be shown in the connection dialog box. You are automatically connected to that server again, which is most frequently what you will require or in rare cases if you do have multiple TicketM Server in your organization, you can provide the name of alternative server to connect to it.

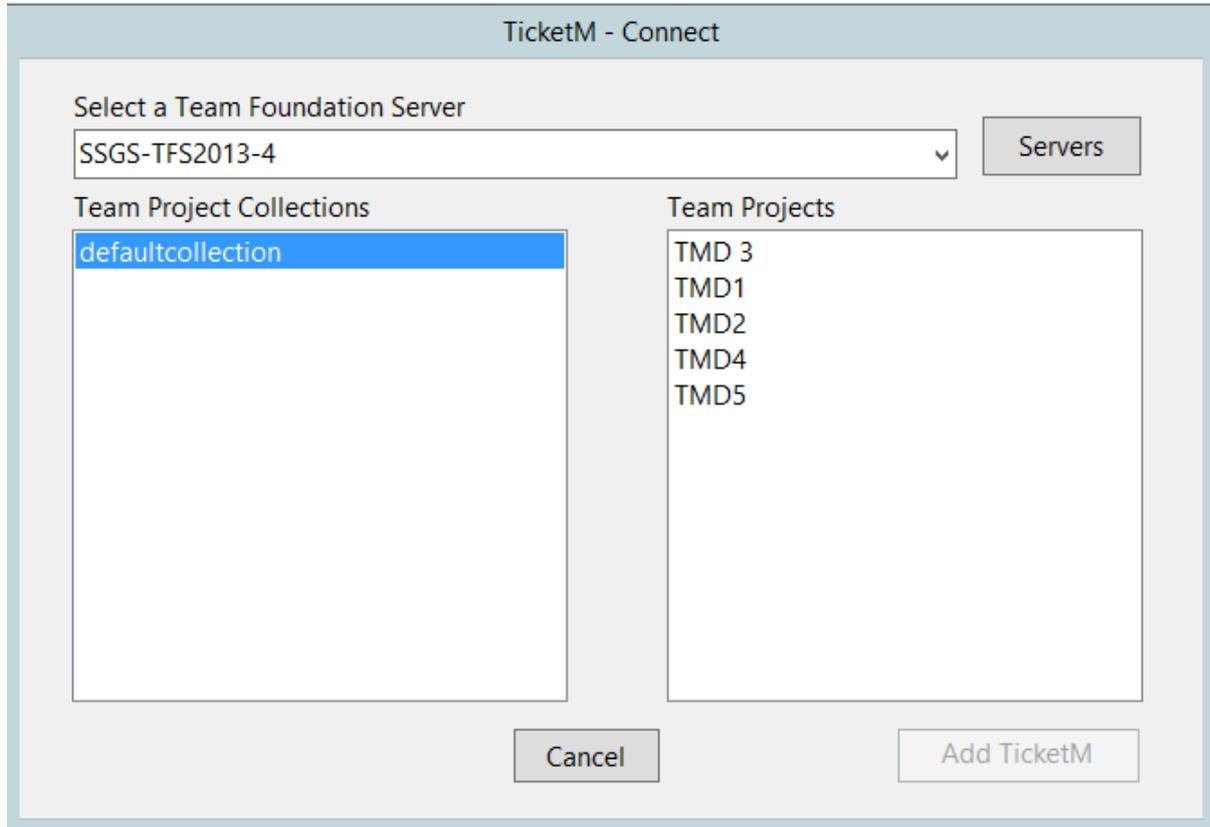


## Add TFS to the list

There may be many TFS in your organization. All of them can be supported from one instance of TicketM. A TFS that does not exist in the list can be added in the list of supported TFS by either the TFS Administrator or TPC Administrator. To add a TFS in the list begin from "Add support to a Team Project" menu item. If the team project selection form does not list the desired TFS then click on Servers button. In the ensuing dialog-box provide the name of the TFS to be added to the list and Click on the Add button. A check to ensure that the TFS does exist and is online is made and then that TFS will be added to the list.

## Add TicketM Support to a Team Project

To add TicketM Support for a team project, click the menu item "Add Support to a Team Project". Select the TFS on which that team project exists and then select the team project collection in which that team project exists. Team projects that currently do not have support of the TicketM will be listed on the right side.



The screenshot shows a dialog box titled "TicketM - Connect". It features a dropdown menu for "Select a Team Foundation Server" with "SSGS-TFS2013-4" selected and a "Servers" button. Below this are two list boxes: "Team Project Collections" with "defaultcollection" selected, and "Team Projects" with "TMD 3", "TMD1", "TMD2", "TMD4", and "TMD5" listed. At the bottom are "Cancel" and "Add TicketM" buttons.

Select now the team project for which the TicketM support is to be enabled. Click on the Add TicketM button.

**TicketM - Connect**

Select a Team Foundation Server

SSGS-TFS2013-4 Servers

Team Project Collections

- defaultcollection

Team Projects

- TMD 3
- TMD1
- TMD2
- TMD4
- TMD5

Cancel Add TicketM

You will be asked for the details of the email account from which you want to convert emails to tickets. You will be also asked to provide the working days and time of the team. This will provide the basis for computation of if the ticket is in the same state beyond the limit of escalation period.

### TicketM - Connect

#### TicketM - Get Email Details

Enter Email Address to Monitor

Confirm Email Address to Monitor

Enter Password

Confirm Password

Server  Port

SSL

### WorkingDaysTimeForm

#### Working Days

**Working Days of the Week**

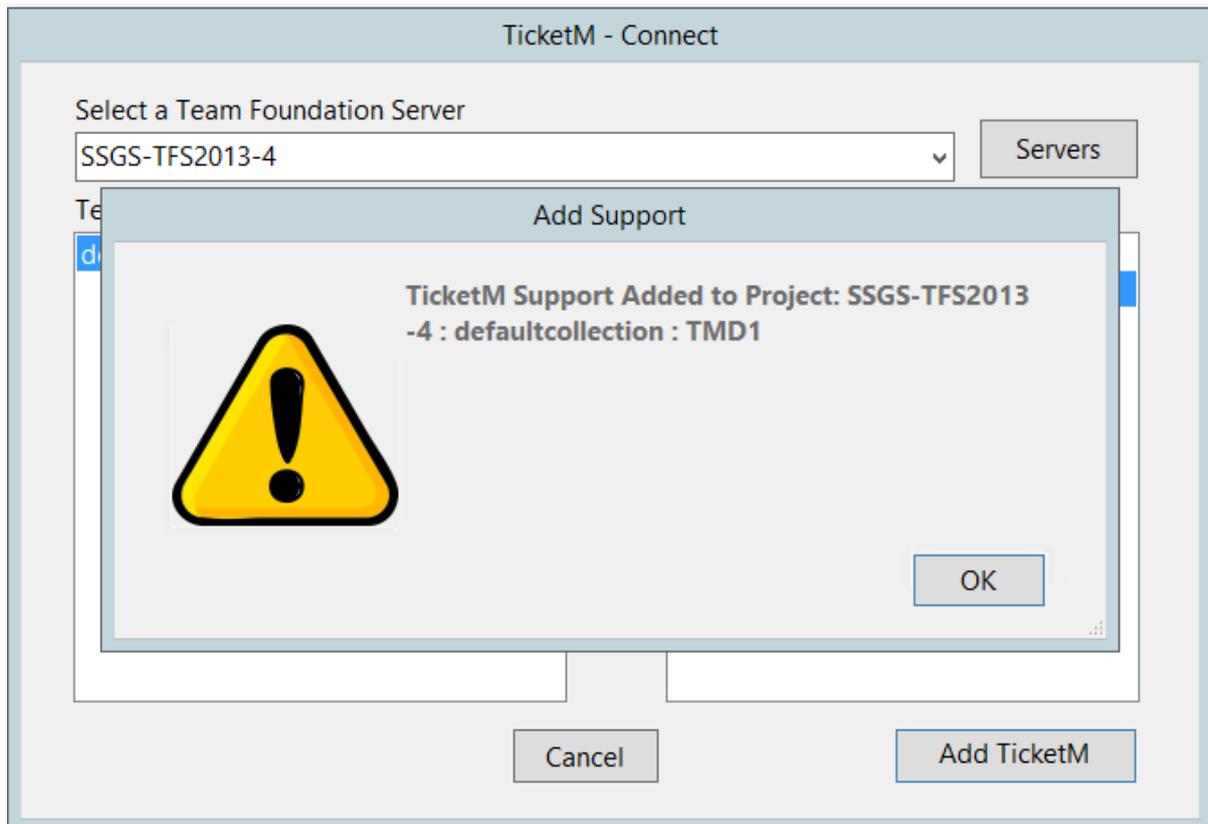
Mon  Tue  Wed  Thu  Fri  Sat  Sun

#### Working Hours

Start Time  End Time

In the background following actions will be taken:

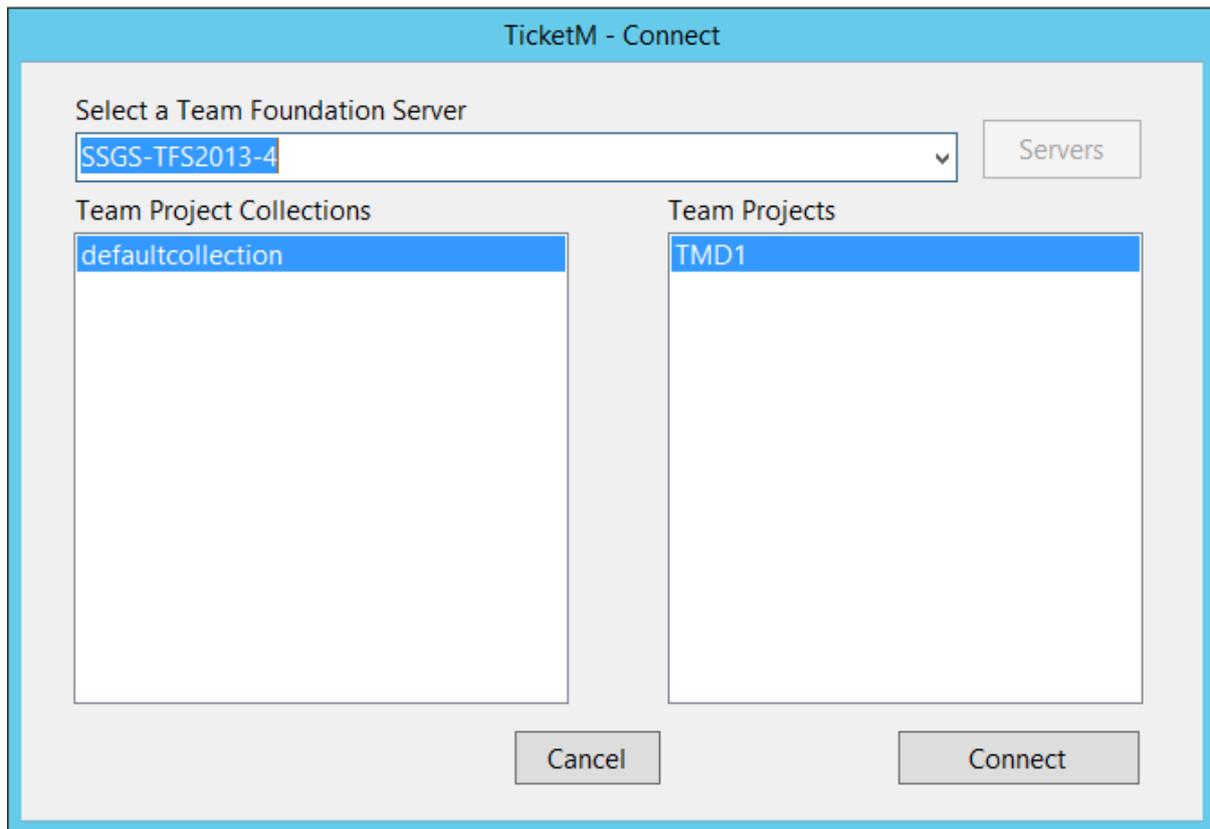
1. Upload Ticket work item to that project.
2. Upload standard queries related to tickets to the project
3. Upload standard reports related to tickets to the project
4. Make necessary entries in the configuration files.
5. Connect to that team project from TicketM Client so that you can make changes to the default configuration.



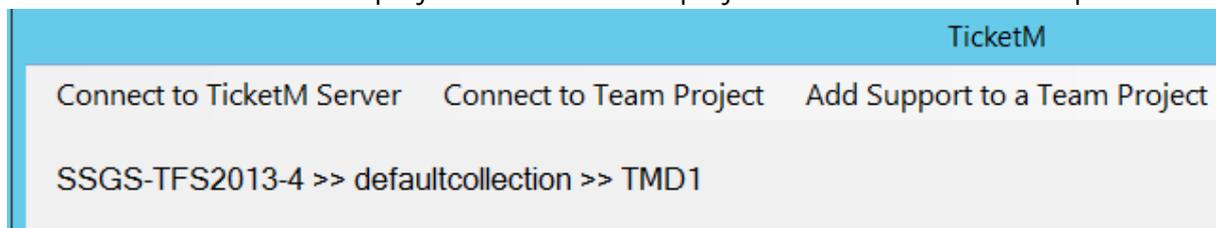
### Connect to supported team project

If presently connected team project is different than the one for which you want to make some configuration changes then you can first connect to the desired team project. To connect to supported team project, click on the menu item "Connect to Team Project". Select the desired TFS and Team Project Collection. The list of all supported team projects will be shown on the right hand side. Select the one that you want to connect to and click on the

Connect button.

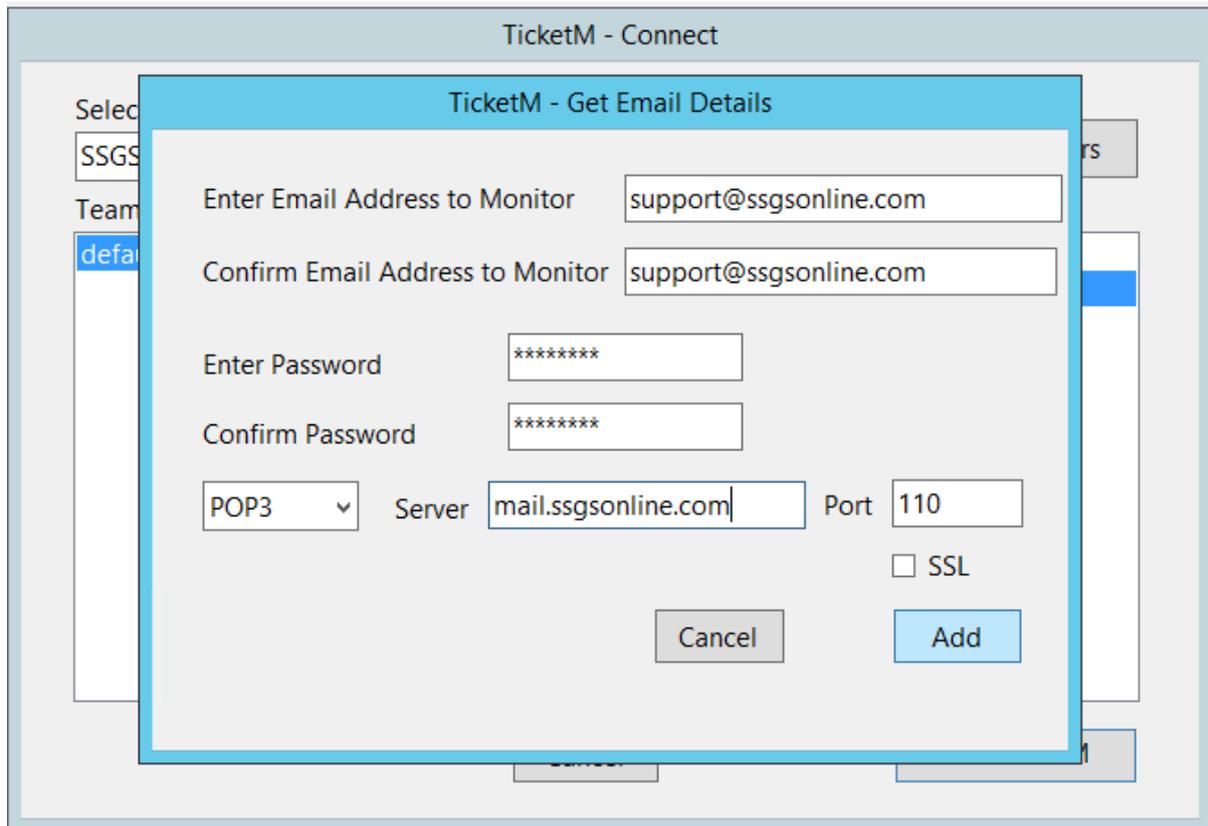


Now you can make any changes in the configuration like email, escalation, working hours and ticket workflow for that project. The connected project will be shown at the top.



### Configure Email Settings

You can convert emails received at one email address per team project. You need to provide details of that email address so that emails can be downloaded and converted to ticket work items as desired. From the menu "Edit Settings for a Team Project" select the sub-menu item "Edit Email Settings". The new window will show the existing settings which you can change and update.



The screenshot shows a 'TicketM - Connect' dialog box with a sub-dialog titled 'TicketM - Get Email Details'. The sub-dialog contains the following fields and controls:

- Enter Email Address to Monitor: support@ssgsonline.com
- Confirm Email Address to Monitor: support@ssgsonline.com
- Enter Password: \*\*\*\*\*
- Confirm Password: \*\*\*\*\*
- Protocol: POP3 (dropdown)
- Server: mail.ssgsonline.com
- Port: 110
- SSL:
- Buttons: Cancel, Add

### Configure Escalation Settings

From the menu "Edit Settings for a Team Project" select the sub-menu item "Edit Escalation Settings". In the new window you will be able to see a data grid with the columns for State, Escalation Account, Priority and Escalation period in hours.

**TicketM Escalation Settings**

	State	Escalation Account	Priority	Escalation Period
▶	Proposed	administrator	High	2
	Proposed	administrator	Low	2
	Active	administrator	High	2
	Active	administrator	Low	2
	Closed	administrator	High	2
	Closed	administrator	Low	2
	Resolved	administrator	High	2
	Resolved	administrator	Low	2
*				

Note: The escalation period is in the unit of hours. Only working hours will be considered.

You can change the escalation account and Escalation period

**TicketM Escalation Settings**

	State	Escalation Account	Priority	Escalation Period
	Proposed	administrator	High	4
▶	Proposed	administrator	Low	6
	Active	administrator	High	3
	Active	administrator	Low	5
	Closed	administrator	High	10
	Closed	administrator	Low	10
	Resolved	administrator	High	2
	Resolved	administrator	Low	2
*				

Note: The escalation period is in the unit of hours. Only working hours will be considered.

If you make any wrong entry, for example in Escalation Accounts column if you set an account that is not in the "Contributors" group of your Team Project then a Red mark with explanation of error will be shown.

TicketM Escalation Settings

	State	Escalation Account	Priority	Escalation Period
	Proposed	administrator	High	4
▶	Proposed	Contributors	Low	6
	Active	administrator	High	3
	Active	administrator	Low	5
	Closed	administrator	High	10
	Closed	administrator	Low	10
	Resolved	administrator	High	2
	Resolved	administrator	Low	2
*				

Note: The escalation period is in the unit of hours. Only working hours will be considered.

Cancel
Save

After the changes are made, you can save those in the configuration file by clicking on the Save button.

### Customize Working Days and Time

Each organization may have different set of working days and time. Those will be used for checking if the ticket needs to be escalated or not. You can configure the working days (of week) and working hours (of the day) from the editor. That editor opens when you select the submenu of "Set working days and time" from the menu item "Settings for a Team Project".

**WorkingDaysTimeForm**

Working Days

**Working Days of the Week**

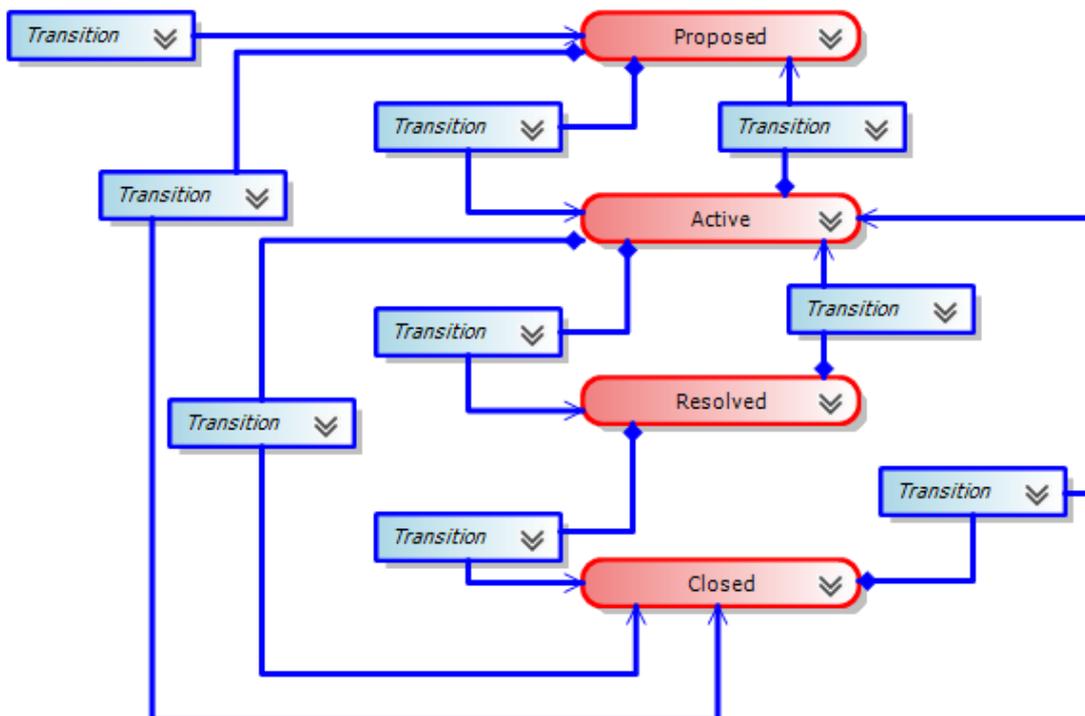
Mon
  Tue
  Wed
  Thu
  Fri
  Sat
  Sun

Working Hours

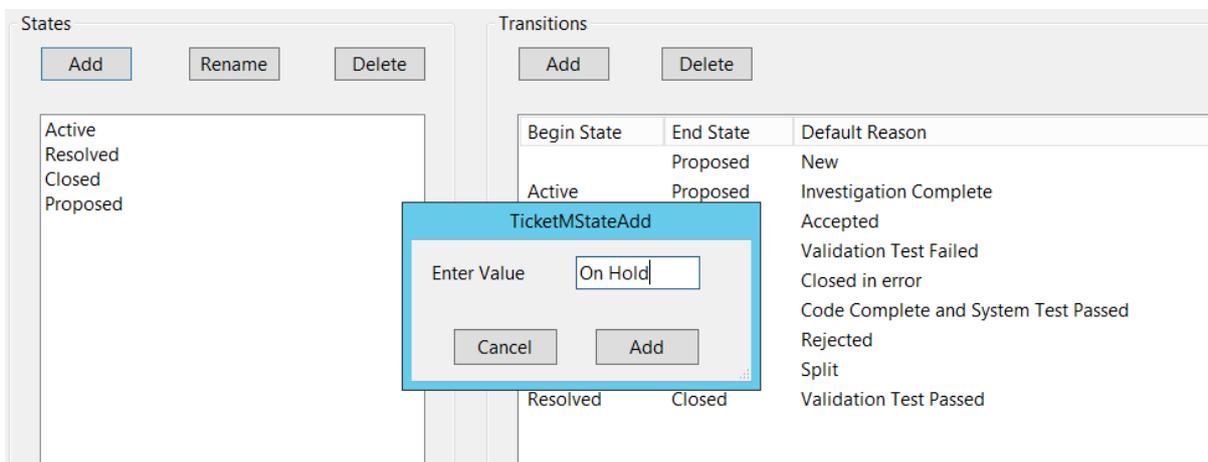
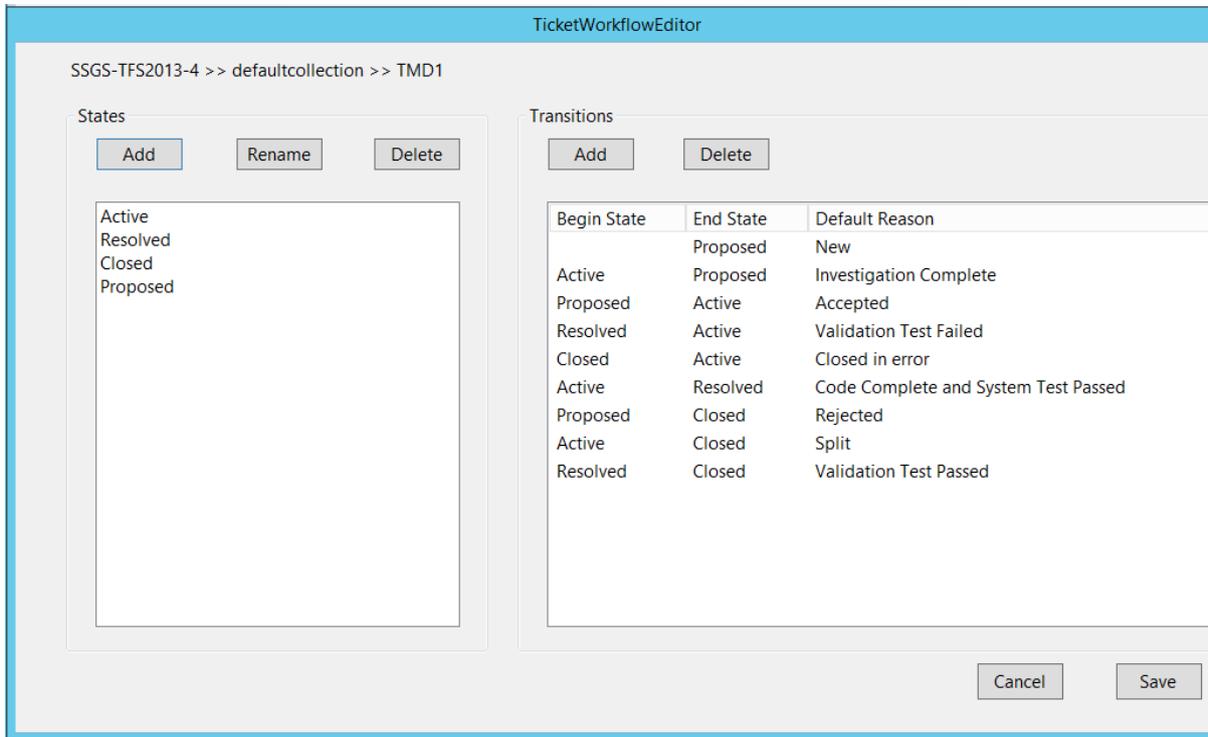
Start Time 
 End Time

### Customize Workflow of Ticket

Standard workflow of the ticket consists of states – Proposed, Active, Resolved and Closed. It also supports appropriate transitions. The default state chart looks like this:



You are allowed to add, rename or delete a state and related transitions. To do that, select the menu item "Customize Workflow of Ticket". A workflow editor opens in a new window. You can add, rename or delete the state from the left pane. When you delete a state, automatically the related transitions on the right pane also are deleted.



You can also edit the transitions to add or delete the transitions from one state to another. While adding a transition you will have to provide the beginning state, end state and a default reason for transition.

**Provide Begin, End States and Reason**

Begin State

End State

Default Reason

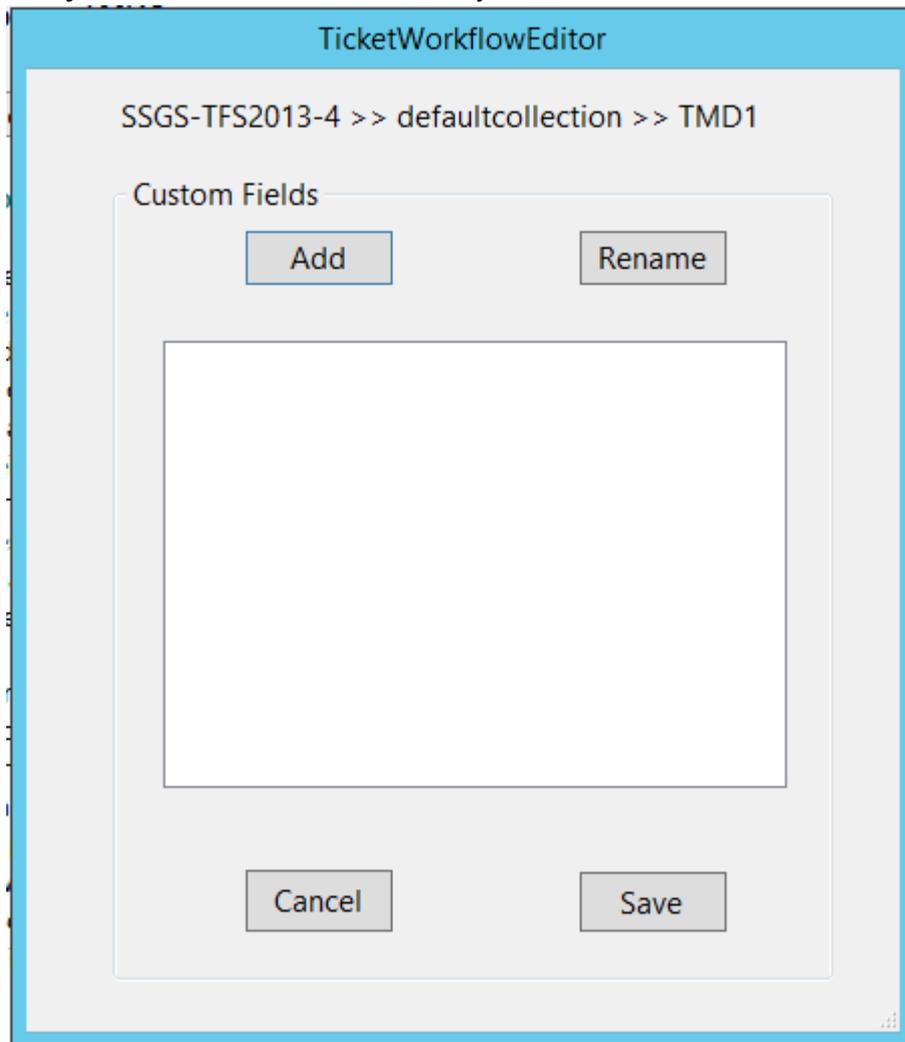
**Transitions**

Begin State	End State	Default Reason
	Proposed	New
Active	Proposed	Investigation Complete
Proposed	Active	Accepted
Resolved	Active	Validation Test Failed
Closed	Active	Closed in error
Active	Resolved	Code Complete and System Test Passed
Proposed	Closed	Rejected
Active	Closed	Split
Resolved	Closed	Validation Test Passed
Active	On Hold	Not Clear
On Hold	Active	Cleared
On Hold	Closed	Dropped

### Custom Fields Editor

Ticket work item contains minimum possible fields to store relevant data. For each project you may want to store some additional data. For example for one project that caters to multiple customers you may want to store the name of customer for each ticket. You can create that as a field in the ticket work item for that project only, using Custom Fields Editor. You may create as many custom fields in the ticket as your need of the data. To create a custom field, select the submenu item "Custom Fields Editor" from the "Edit Settings of a

Team Project” menu. In the new window you will be able to see the existing custom fields if



any.

Click on the Add button will open the window in which you can provide following details about the new field that you are going to create:

1. Name – Anything unique which may contain spaces too.
2. Data type – String, Integer, Double etc.
3. Reportable as – Dimension, Measure, Detail or None.
4. Allowed values – Will appear as a dropdown on the form.

**TicketMStateAdd**

Enter Field Name	<input type="text" value="Customer Name"/>
Enter Data Type	<input type="text" value="String"/>
Reportable As	<input type="text" value="dimension"/>
Allowed Values	<input type="text" value=""/> <input type="button" value="+"/> <input type="text" value="U-To Solutions"/> <input type="text" value="SBN Technologies"/>

When you click on the Add button the field will get added to the ticket work item type for the selected team project. It will also start appearing in the list of existing custom fields in the editor.

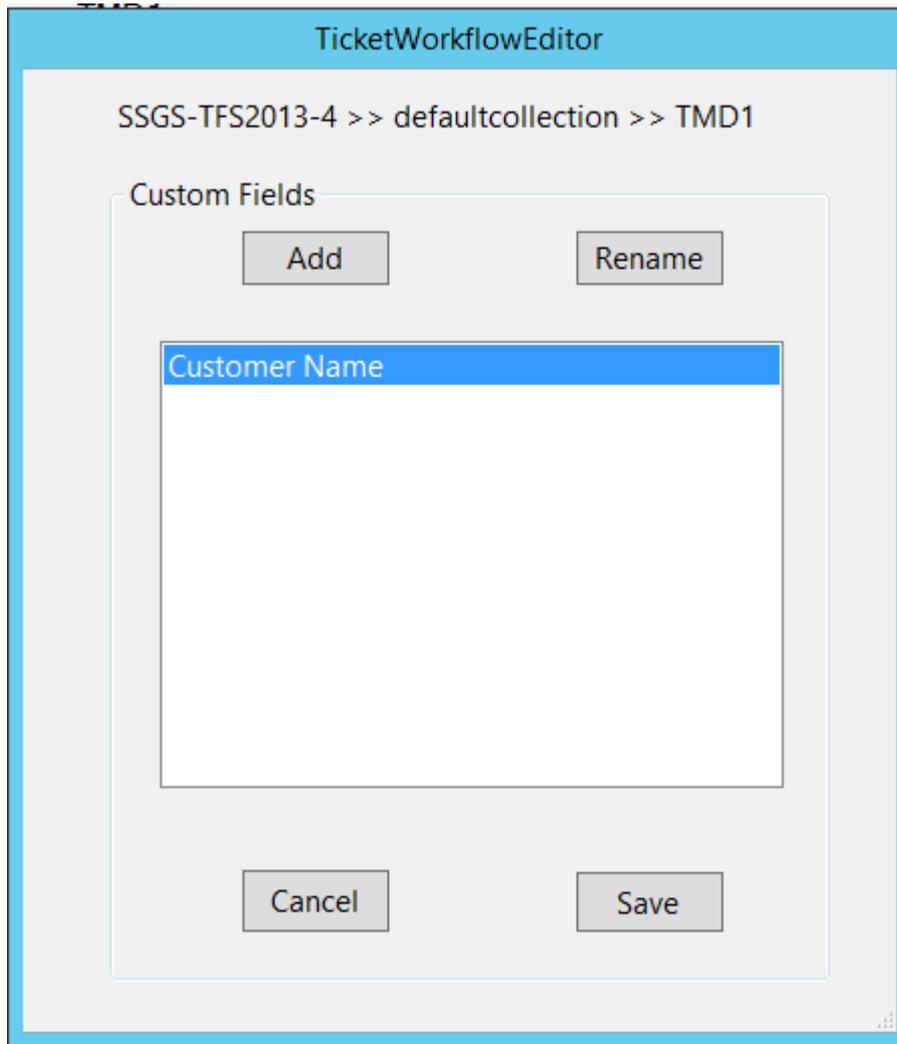
TMD1

### TicketWorkflowEditor

SSGS-TFS2013-4 >> defaultcollection >> TMD1

Custom Fields

Customer Name
---------------

The screenshot shows a software window titled 'TicketWorkflowEditor'. At the top, it displays a breadcrumb path: 'SSGS-TFS2013-4 >> defaultcollection >> TMD1'. Below this is a section labeled 'Custom Fields' which contains two buttons: 'Add' and 'Rename'. A table with one row and one column is shown, with the text 'Customer Name' in the cell. At the bottom of the window are two buttons: 'Cancel' and 'Save'. The window has a light blue border and a standard Windows-style title bar.