ACT Service Request System – User Guide
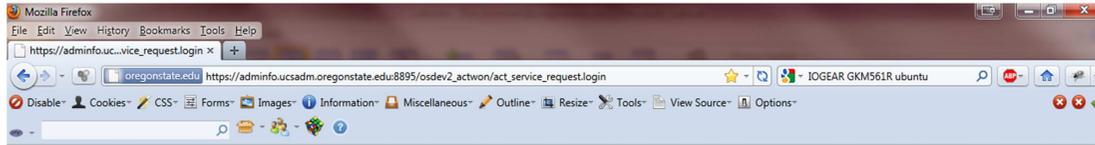
Login Page – Type your ONID user id and ONID password and click Login (you must be defined in our system with a group and role to access the system)

https://adminfo.ucsadm.oregonstate.edu:8895/osprod_actwon/act_service_request.login - link to login page

Home Page
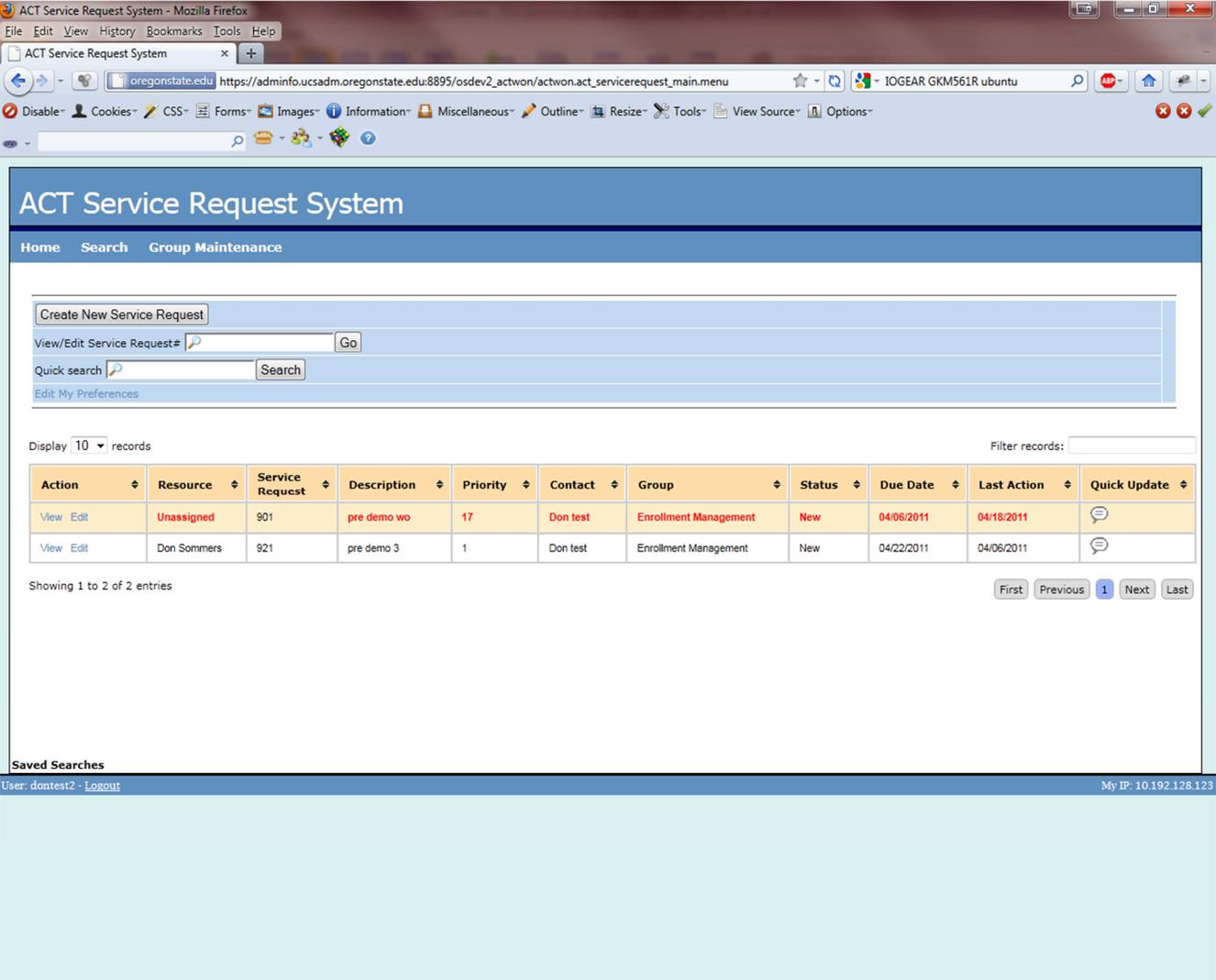
Home - This is the first page you come to after logging in.   On the top you will find 3 tabs for   Home, Search and Group Maintenance.

The Search Page will allow you to search for service requests in the system.

The Group Maintenance page is used for setting priority of service requests for your group and changing the status of a service request.

Also on this page is a button to Create New Service Request - Use this button to open a new request

View /Edit Service Requests – This will take you to the View page of a Service Request (SR) by keying in the SR number and clicking Go

Quick Search - putting text in the search box and clicking search will then take you to the search page and return the results. You can further refine your search on the search page if needed.

Edit my Preferences – This will take you to a page where you can set your color theme and your email notification preferences.

Next on the page is a list of open SR's that consists of SR's you or your group have submitted and have not been closed or cancelled. The list will contain a link to view or edit the SR, who the analyst assigned is (resource), the SR number, description, priority, contact, the submitting group, status, last action and quick update. The quick update allows you to quickly make a comment on the SR. Click the image and dialog box will open that you can type a comment into to add to the SR. The list will initially be sorted in descending order by the last action date. You can click on the column heading to sort by another column. Multiple sort columns can be done by holding down the shift key when you click the column headings. You can also alter how many lines per page are displayed (on the left) and filter your list (on the right). The filter will look across all columns for matching text. You can use a space to separate multiple filters (ex. new unassigned would return any column with New and Unassigned in them – it is not case sensitive). There is a slight delay in the filter so that you can enter longer search strings without having the list read just while typing. The bottom right allows you to go to other pages.

Finally on the Home page you may have Saved searches displayed. This will be covered more under Searching but for now it is just a place where you can click to run a search you have saved or delete it if it is no longer necessary.

Create New Service Request

Now to create a SR we have clicked on the Create New Service Request button on the Home page and it brings us to the initial entry page of the SR.   By default your name, email, phone will put into the Contact information at the top.   If you have the role of a custodian you may submit on behalf of someone in your group.   To do that click the Customer Group and select your group you are submitting for (The list will be the groups you belong to).   Once you select a group then you can click Lookup User and a new window will open listing the people in that group and you can select them and it will fill in the contact information for you.

After that you will type a Short Description or the SR and select the Type of request that the SR is.   The Priority cannot be set on this page and Status will default to New for a new request.

Due Date is optional but suggested.

Comments are required and are there to give a longer description of the SR.

Resource is who in ACT will be working on the request and not available for the user to select

Add Attachments allows you to select an attachment such as a Word Doc, PDF, Excel, Image etc to add to the request for additional information.   There is a 5 MB limit on the size of each file attached.   Some browsers such as Firefox and Chrome allow you to select Multiple Attachments.   Internet Explorer does not support that at this time.

Notifications – Allows you to select from your group members additional people you will be emailed updates.   Or you can select the checkbox to Notify Group Members which will notify all group members.   This is selected by default so unselect it if you don't want your whole group emailed.
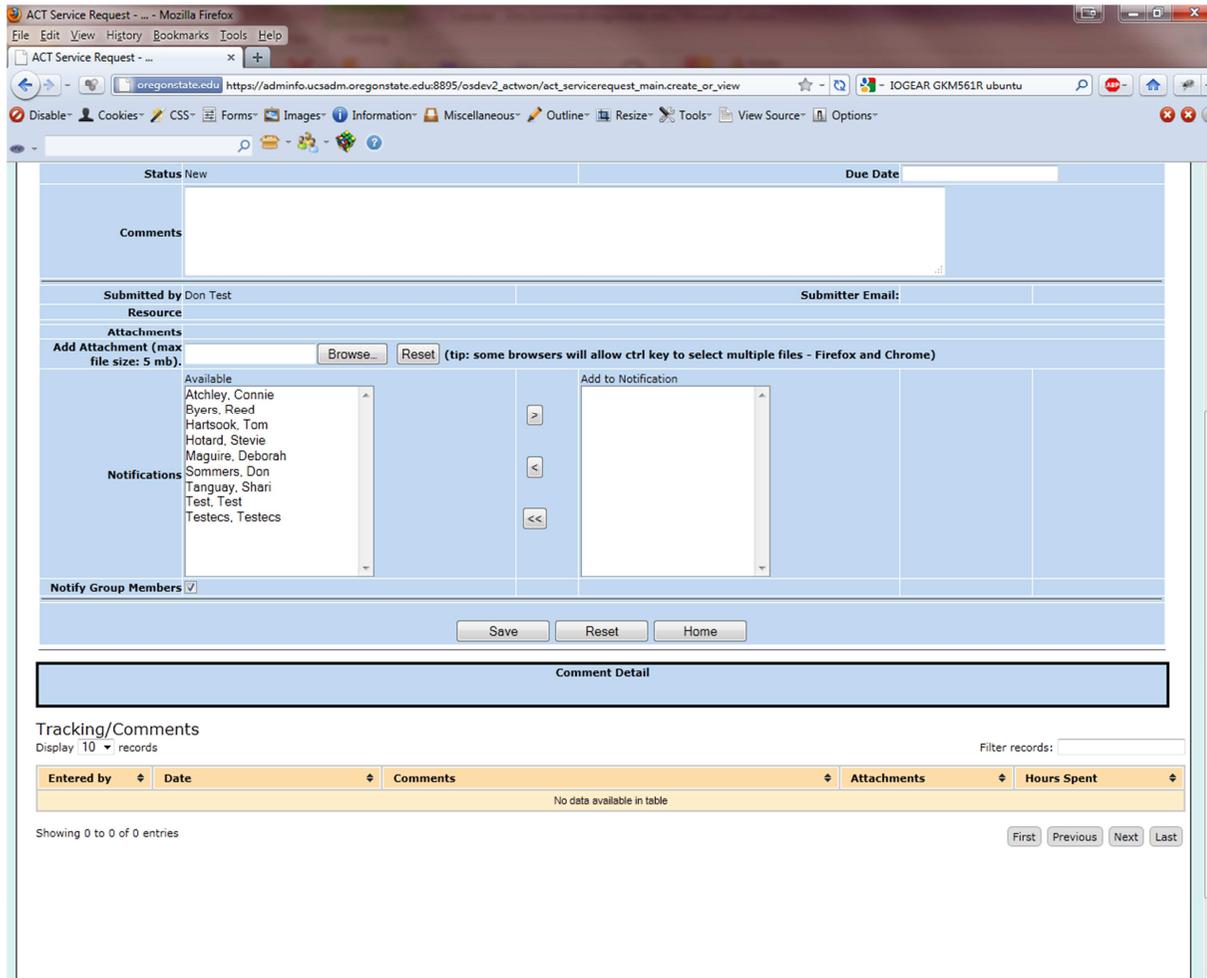
Scrolling down the page we come to the Save, Reset and Home buttons.   The Save will save the SR and you will have created a new SR and an SR number will be assigned.   Reset will clear the fields on the form so you can start over.   Home will take you to the Home page and essentially cancel your SR request.

Below that is the SR Comment Detail and tracking log which will be further explained later in this document.

View Page

After Submitting the SR it will take you the View page of the SR.   In the upper portion will be the basic information about the SR.   In the bottom portion will be a list of the tracking information for the SR.   This will be a table similar to the table on the Home page but it will list the history of what has occurred on the SR. In this case only our initial Comments when we opened the SR are available.   If the comments are long only a portion of the comment will be shown. Following the portion of the comment will be a 'More' that you can click on to see the full text of the comment.   This will be displayed in the Comment Detail Section located above the tracking table.   This will be demonstrated later in this document.   To edit the ticket to add comments, attachments etc. click the Edit Service Request button. Sorting, paging and filtering work the same as the home page.

Edit Page

This is the Edit Page for an existing SR.   When you first come to this page you will be placed in the Comments field since this is most likely what you will be doing is adding comments.   However you update the fields that are available to you such as SR type, Due Date, add attachments, notifications etc.   Once you click Save the changes will be recorded.

Below in the tracking area we can see what has occurred so far on this request.   The tracking shows who made the entry, the date and time of the entry,   Any comments and attachments that were added and any hours recorded by the analyst.   In this example you can see a long comment with the More button. Once you click the More button the full comment text will be displayed in the Comment Detail area. See the next page

Here is the example of the Comment Detail being displayed.   If you have several More buttons in your tracking you can click them to change the comment detail to what you just clicked.   Clicking the Close button will collapse the Comment Detail section back to its original size.

Adding Attachments to an Service Request

To add an attachment to the SR, click the Browse button after Add Attachment.   This will open a window for you to locate the file on your computer that you want to attach.   Once you locate the file and select it then click Open.   This will close the window and put the file location in the text box next to the Browse button.   When you click Save the file will be attached to the SR.   Note: There is a 5 MB limit for each file attached.

After clicking Save it will return you to the view page and you will see your attachment in the tracking table.   You can click the attachment to open it.

Search Page
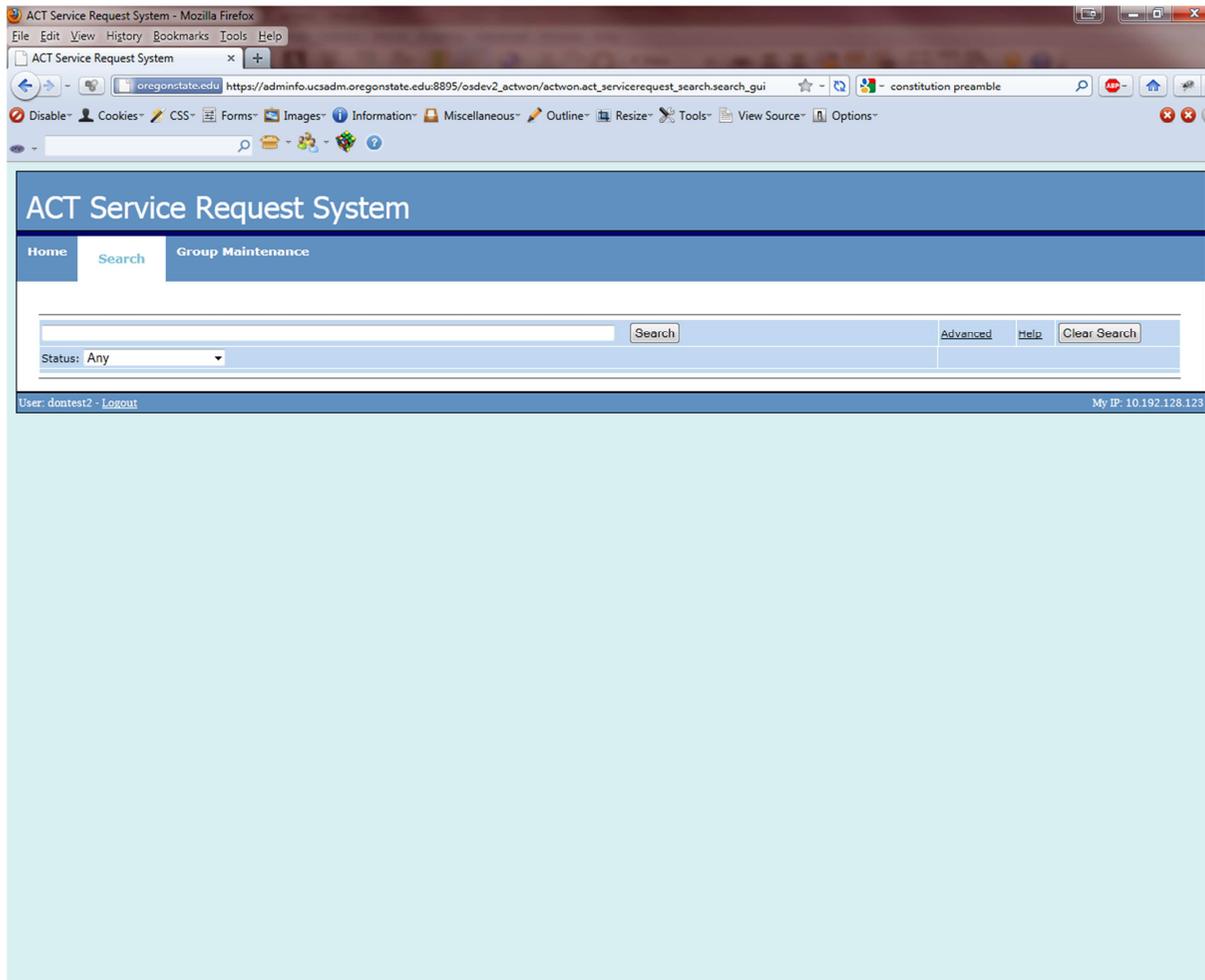
The Search page will allow you to search for SR's.   A standard search will search across the main items of the SR with whatever status is set in the Status dropdown list.   Type some text and set the status you are looking for and click the Search button.

ACT Service Request System

Home | Search | Group Maintenance

demo [Search] Advanced Help [Clear Search]

Status: Any

Display 10 records   Filter records:

Action	Resource	Service Request	Description	Contact	Group	Priority	Status	Entry Date	Due Date	Last Action
View Edit	Don Sommers	921	pre demo 3	Don test	EM	1	New	04/06/2011	04/22/2011	04/06/2011
View Edit	Don Sommers	1421	test for BAF demo	Don test	ACCT		New	Today		Today

Showing 1 to 2 of 2 entries

[First] [Previous] [1] [Next] [Last]

User: dontest2 - Logout   My IP: 10.192.128.123

The results will be displayed in a table layout with the options to view or edit (if you have the right permission) the SR.   The resource, SR number, description, contact, group, priority, entry date, due date and last action date will be displayed.   Like the Home page the table can be sorted and filtered in the same way.

To do an advanced search or to save a search, click the Advanced link. This will open another area on the page where you can narrow your search to specific items such as comments, contact, resource, group, service type, date created or date last updated. To save the search for later searching you can click the checkbox Save query to my task list: and type something in the Query name: field and click search. The search will be saved and then show on the bottom of your Home page for later searching.

Group Maintenance Page
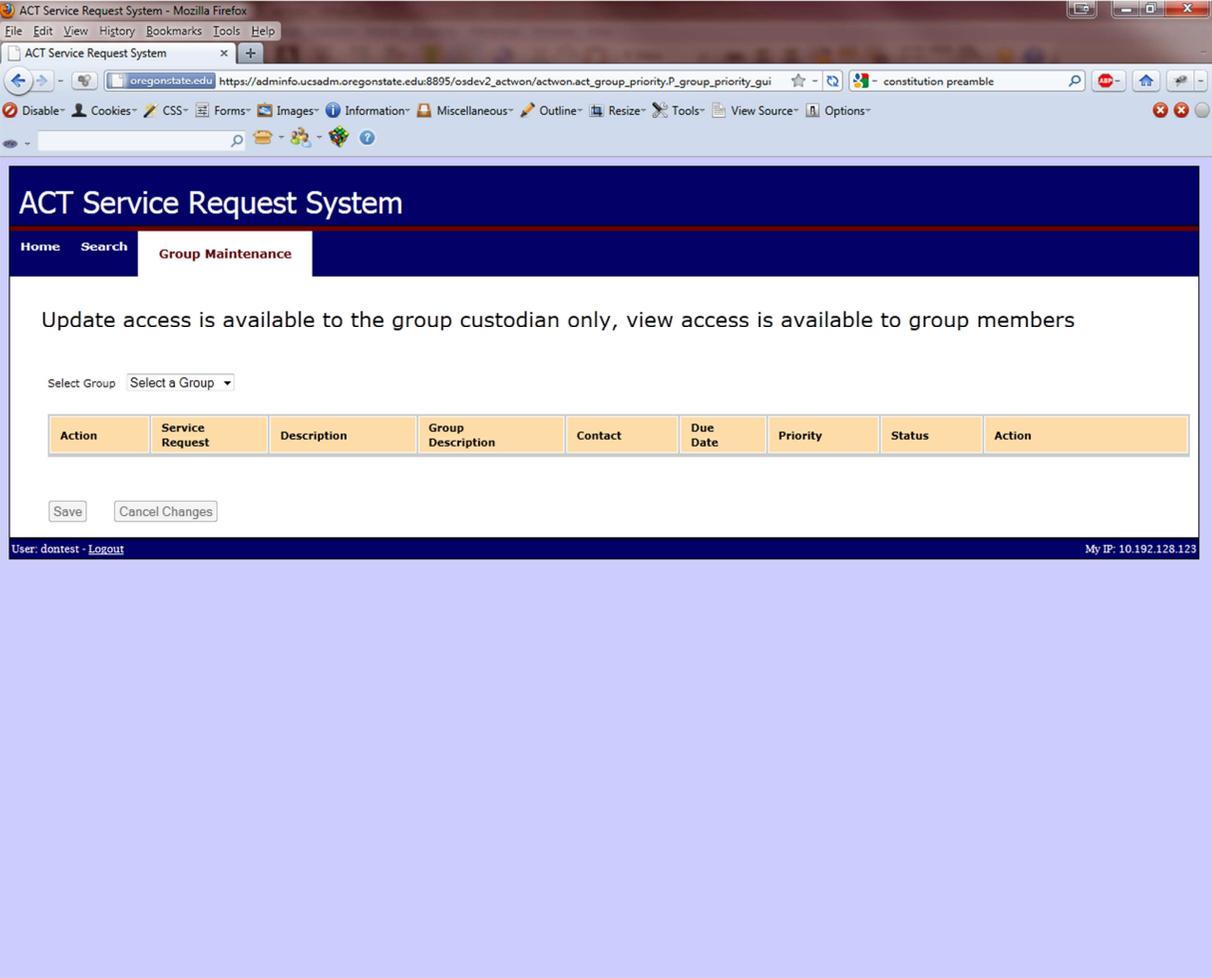
The Group Maintenance page is available to all users who belong to main groups.   Users that are only in groups underneath a parent group cannot view the group maintenance information.   An example of a parent group would be the Student Finance group.   This group has 'child' groups under it such as Cashiers, Id Center, Student Accounts, and Debt Collection.   Groups that do not have child groups are main groups.   There are only two levels of groups so child groups cannot have groups under them.   To be able to update priority and status settings for the group you must have Custodian rights within the group.

Once selecting the group, the Custodian will be presented with a table that looks like above.   There is no sorting or filtering available on this table.   The table will show only current SR's for the group and child groups.   The Action links on the left allow you to view or edit the SR.   Other fields listed are the SR number, Description, Group Description, Contact, Due Date, Priority and Status.   The action buttons on the right allow you to shift the priority of the SR's.   The layout of the buttons is Up, Down, Top, Bottom.   To set priority you need to click on one of the buttons.   The SR at the top of the list will become priority 1 and the following will be sequentially numbered down the list.   You cannot have multiple number ones.   The Status dropdown will display the current status of the SR as well as Cancelled, Closed and On Hold.   These are the only status settings available outside of the ACT group.   Once you make a change the Save and Cancel Change buttons will become enabled and you can either click Save to update the SR's or Cancel Changes to revert back to what things were when you first selected the group.
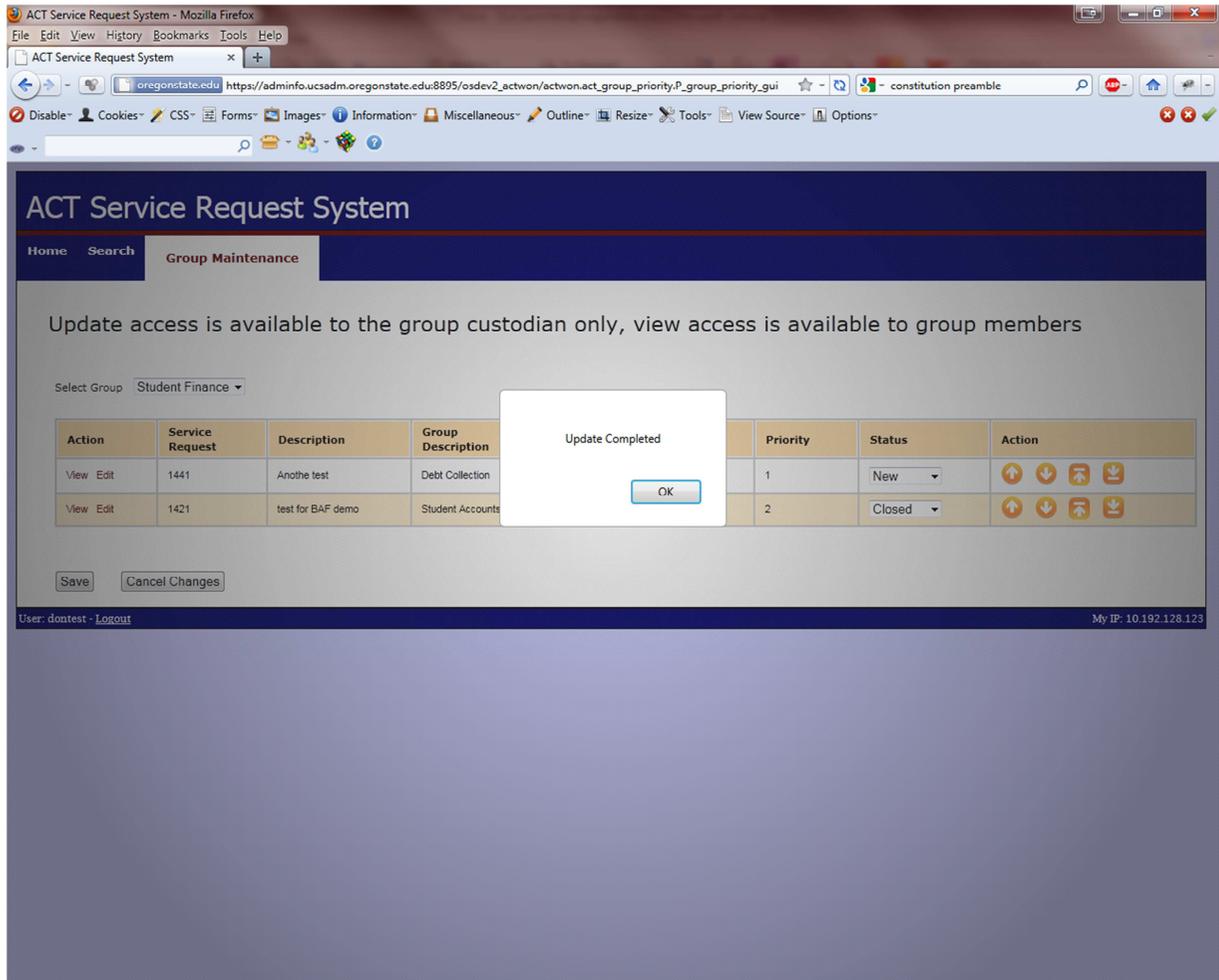
Once you click Save you will be presented with the Update Completed Message.   If an SR was closed or cancelled during the update it will be removed from the list.   Changing the priority will cause a tracking record to be written for each SR that was changed.   Changing the status of an SR will also create tracking records.   Email notifications of these changes are not done due to the possibility of many emails being generated by moving priorities.

My Preferences
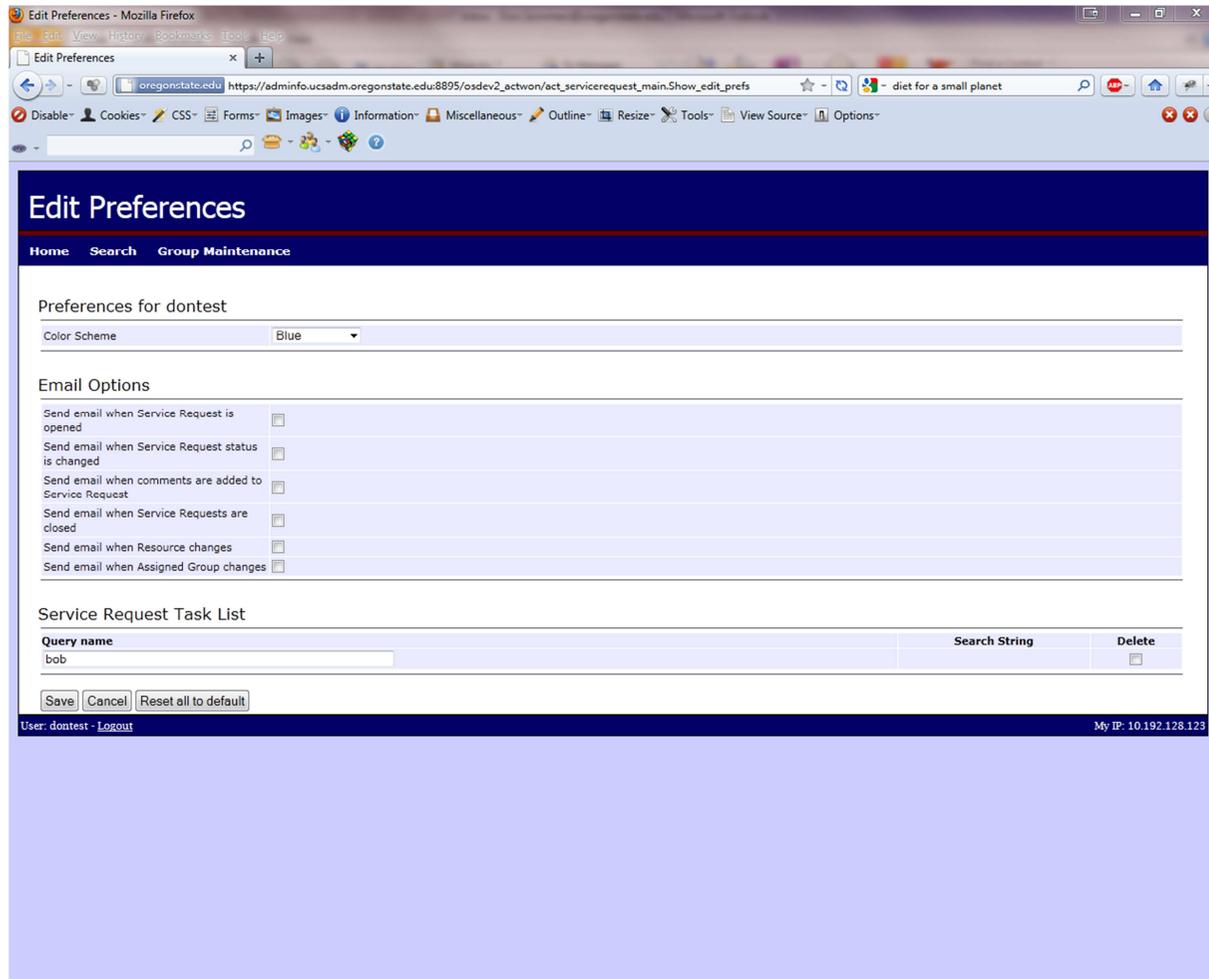
On the Home page if you click Edit My Preferences you will come to this page.   On this page you can pick your Color Scheme to something that you find pleasing to your eye.   The default color scheme is Red.   The above scheme is the Blue scheme and previously in this document the Winter theme was used.

The Email options allow you set when you will be notified of certain events.   We will initially set these to all be on when you are first set up but you can change to whatever works for you.

You can also rename or delete any saved searches that you have set up in the past.

Roles

The system is set up so that you are assigned a role for each group.   What you can do is determined by the role you have in the group.

Admin – Available to only certain members of the ACT group and allows access to the User Maintenance pages to set up and grant roles to users.

Custodian –

      a)   Has the ability to submit SR's
      b)   Has Edit capabilities on any SR for the group
      c)   Is allowed to submit SR's on behalf of someone else in the group
      d)   Is allowed to set priorities and status for SR's for any Parent Group they are custodian for

Edit - Has the ability to Submit SR's and edit SR's that belong to their group

View – Can view SR's for their group but cannot submit or Edit them.

None – No access to this group

Spell Checking

Spell checking of text data for the comments field is available in certain browsers.

In Firefox this is usually enabled by default, if not it can be set in Tools -> Options -> Advanced (tab) -> Check my Spelling as I type

In Internet Explorer an add on is required such as "ieSpell" http://www.iespell.com/ - we have not tested this add on so cannot verify its functionality

In Google Chrome spell check is on by default – Options can be set by right clicking on the text field you are typing in and selecting spell-checker options.