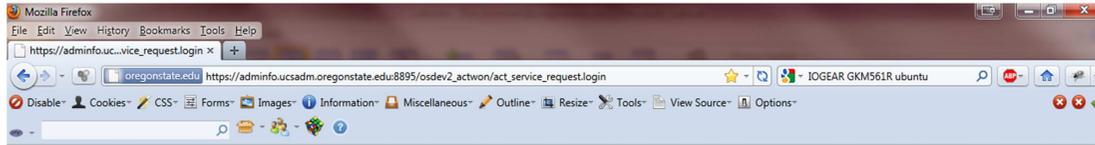


ACT Service Request System – User Guide



ACT Service Request System Login

Username:

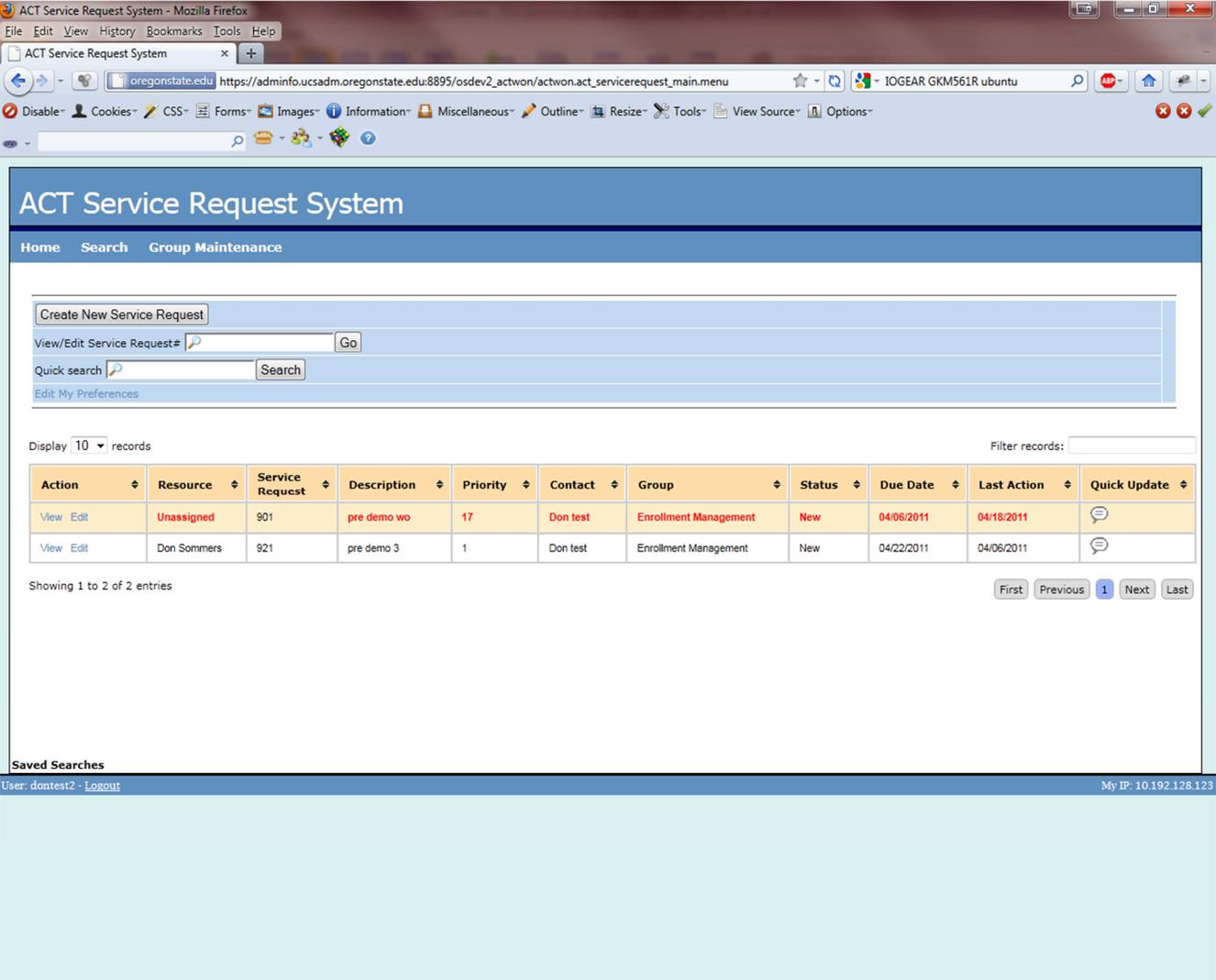
Password:

[Reset your ONID password here.](#)

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://admininfo.ucsdm.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.

ACT Service Request System

Home Search Group Maintenance

Create New Service Request

View/Edit Service Request# Go

Quick search Search

Edit My Preferences

Display 10 records Filter records:

Action	Resource	Service Request	Description	Priority	Contact	Group	Status	Due Date	Last Action	Quick Update
View Edit	Unassigned	901	pre demo wo	17	Don test	Enrollment Management	New	04/06/2011	04/18/2011	Quick Update
View Edit	Don Sommers	921	pre demo 3	1	Don test	Enrollment Management	New	04/22/2011	04/06/2011	Quick Update

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

Saved Searches

User: dontest2 - Logout My IP: 10.192.128.123

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.

ACT Service Request System

Home Search Group Maintenance

Create New Service Request

View/Edit Service Request# Go

Quick search Search

Edit My Preferences

Display 10 records Filter records:

Action	Resource	Service Request	Description	Priority	Contact	Group	Status	Due Date	Last Action	Quick Update
View Edit	Unassigned	901	pre demo wo	17	Don test	Enrollment Management	New	04/06/2011	04/18/2011	
View Edit	Don Sommers	921	pre demo 3	1	Don test	Enrollment Management	New	04/22/2011	04/06/2011	

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

Saved Searches

User: dontest2 - Logout My IP: 10.192.128.123

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.

ACT Service Request System - Mozilla Firefox

File Edit View History Bookmarks Tools Help

ACT Service Request System x

oregonstate.edu https://adminfo.ucsdm.oregonstate.edu:8895/osdev2_actwon/actwon.act_servicerequest_main.menu IOGEAR GKM561R ubuntu

Disable Cookies CSS Forms Images Information Miscellaneous Outline Resize Tools View Source Options

ACT Service Request System

Home Search Group Maintenance

Create New Service Request

View/Edit Service Request# Go

Quick search Search

Edit My Preferences

Display 10 records Filter records:

Action	Resource	Service Request	Description	Priority	Contact	Group	Status	Due Date	Last Action	Quick Update
View Edit	Unassigned	901	pre demo wo	17	Don test	Enrollment Management	New	04/06/2011	04/18/2011	
View Edit	Don Sommers	921	pre demo 3	1	Don test	Enrollment Management	New	04/22/2011	04/06/2011	

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

Saved Searches

search for me (1)

My IP: 10.192.128.123

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

The screenshot shows a web browser window with the URL https://adminfo.ucsdm.oregonstate.edu:8895/osdev2_actwon/act_servicerequest_main.create_or_view. The page title is "ACT Service Request - ...". The form is titled "ACT Service Request - ..." and has a navigation bar with "Home", "Search", and "Group Maintenance".

Service Request Information

Service Request	Date: May 04, 2011 02:09 PM
Contact	
First Name: Don	
Last Name: test	
Email:	
Phone:	
Customer Group: Select a group...	
<input type="button" value="Clear"/>	<input type="button" value="Lookup User"/>
Short Description: This is a brief description	
Type: Select a type..	Priority:
Status: New	Due Date:
Comments:	
Submitted by: Don Test	Submitter Email:

Resource

Attachments

Add Attachment (max file size: 5 mb). (tip: some browsers will allow ctrl key to select multiple files - Firefox and Chrome)

Notification

Available			Add to Notification
Atchley, Connie			
Dyers, Reed			
Hartsook, Tom			
Hotard, Stevie			
Maguire, Deborah			
Sommers, Don			
Tanguay, Shari			
Test, Test			
Testecs, Testecs			

Notify Group Members

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.

ACT Service Request - ...

Home Search Group Maintenance

Service Request Information

Service Request Contact Date: May 04, 2011 02:09 PM

First Name: Don

Last Name: test

Email

Phone

Customer Group Select a group...
Clear Lookup User

Short Description This is a brief description

Type Select a type... Priority

Status New Due Date

Comments

Submitted by Don Test Submitter Email:

Resource

Attachments Add Attachment (max file size: 5 mb) Browse... Reset (tip: some browsers will allow ctrl key to select multiple files - Firefox and Chrome)

Available

Atchley, Connie
Byers, Reed
Hartsook, Tom
Hotard, Stevie
Maguire, Deborah
Sommers, Don
Tanguay, Shari
Test, Test
Testecs, Testecs

Add to Notification

Notify Group Members

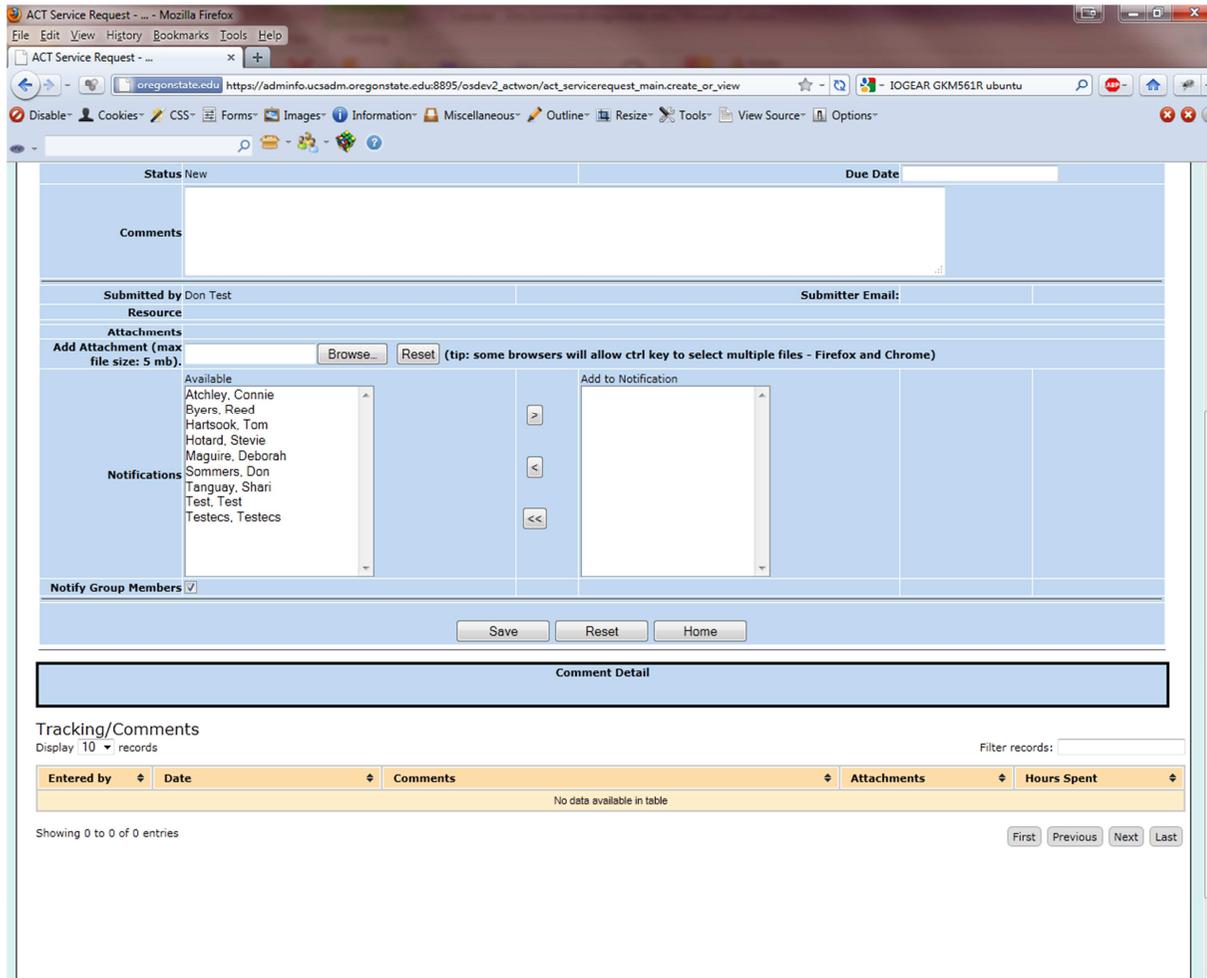
Due Date is optional but suggested.

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

The screenshot shows a web browser window with the title "ACT Service Request - # 1421 - Mozilla Firefox". The address bar shows the URL: https://adminfo.ucadm.oregonstate.edu:8895/osdev2_actwon/act_servicerequest_main.view_ticket?pSR=1421. The page content includes a navigation bar with "Home", "Search", and "Group Maintenance". Below this is the "Service Request Information" section, which contains a form with the following fields:

Service Request Contact	Date: May 04, 2011 02:34 PM	Edit Service Request
Name: Don Test		
Email		
Phone		
Customer Group Student Accounts		
Short Description test for BAF demo		
Type Fix		Priority
Status New		Due Date
Submitted by Don Test		Submitter Email:
Resource	No info available	
Assign to group ACT		
Attachments		

Below the form is a "Comment Detail" section, which is currently empty. At the bottom of the page is the "Tracking/Comments" section, which includes a table with the following data:

Entered by	Date	Comments	Attachments	Hours Spent
Don Test	May 04, 2011 02:34 PM	new SR for BAF		0

The table is followed by a "Showing 1 to 1 of 1 entries" message and a pagination control with buttons for "First", "Previous", "1", "Next", and "Last".

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

ACT Service Request - # 1421

Home Search Group Maintenance

Service Request Information

Service Request Contact	Date: May 04, 2011 02:34 PM		
Name:	Don Test		
Email			
Phone			
Customer Group	Student Accounts		
Short Description	test for BAF demo		
Type	Fix	Priority	
Status	New	Due Date	
Comments			
Submitted by	Don Test	Resource Email:	
Attachments	Add Attachment (max file size: 5 mb). <input type="button" value="Browse..."/> <input type="button" value="Reset"/> (tip: some browsers will allow ctrl key to select multiple files - Firefox and Chrome)		
Notifications	Available Atchley, Connie Byers, Reed Hartsook, Tom Hotard, Stevie Maguire, Deborah Sommers, Don Tanguay, Shari Teet, Teet Testecs, Testecs	> < <<	Add to Notification Test, Don
Notify Group Members	<input type="checkbox"/>		
<input type="button" value="Save"/> <input type="button" value="Close SR"/> <input type="button" value="Reset"/> <input type="button" value="Home"/>			

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.

ACT Service Request - # 1421 - Mozilla Firefox

ACT Service Request - # 1421 x W Preamble to the United States Const... x +

oregonstate.edu https://adminfo.ucadm.oregonstate.edu:8895/osdev2_actwon/act_servicerequest_main_edit_ticket?vService_ID=1 - constitution preamble

Disable Cookies CSS Forms Images Information Miscellaneous Outline Resize Tools View Source Options

Submitted by Don Test Resource Email:

Resource Don Sommers

Attachments

Add Attachment (max file size: 5 mb). Browse Reset (tip: some browsers will allow ctrl key to select multiple files - Firefox and Chrome)

Notifications

Available

- Atchley, Connie
- Byers, Reed
- Hartsook, Tom
- Hotard, Stevie
- Maguire, Deborah
- Sommers, Don
- Tanguay, Shari
- Test, Test
- Testecs, Testecs

Add to Notification

- Test, Don

Notify Group Members

Save Close SR Reset Home

Comment Detail

Tracking/Comments

Display 10 records Filter records:

Entered by	Date	Comments	Attachments	Hours Spent
Don Test	May 04, 2011 03:24 PM	We the People of the United States, in Order to form a more perfect Union, establish Justice, insure... More		0
Don Sommers	May 04, 2011 03:21 PM	Service Request reassigned to Don Sommers.		0
Don Test	May 04, 2011 02:34 PM	new SR for B&F		0

Showing 1 to 3 of 3 entries

First Previous 1 Next Last

Cumulative Hours:

User: dontest2 - Logout My IP: 10.192.128.123

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

ACT Service Request - # 1421 - Mozilla Firefox

ACT Service Request - # 1421 x W/Preamble to the United States Const... x +

oregonstate.edu https://adminfo.ucadm.oregonstate.edu:8895/osdev2_actwon/act_servicerequest_main.edit_ticket?vService_ID=1 - constitution preamble

Disable Cookies CSS Forms Images Information Miscellaneous Outline Resize Tools View Source Options

Submitted by Don Test Resource Email:

Resource Don Sommers

Attachments

Add Attachment (max file size: 5 mb). (tip: some browsers will allow ctrl key to select multiple files - Firefox and Chrome)

Notifications

Available

- Atchley, Connie
- Byers, Reed
- Hartsook, Tom
- Hotard, Stevie
- Maguire, Deborah
- Sommers, Don
- Tanguay, Shari
- Test, Test
- Testecs, Testecs

Add to Notification

- Test, Don

Notify Group Members

Comment Detail

We the People of the United States, in Order to form a more perfect Union, establish Justice, insure domestic Tranquility, provide for the common defence, promote the general Welfare, and secure the Blessings of Liberty to ourselves and our Posterity, do ordain and establish this Constitution for the United States of America.

Tracking/Comments

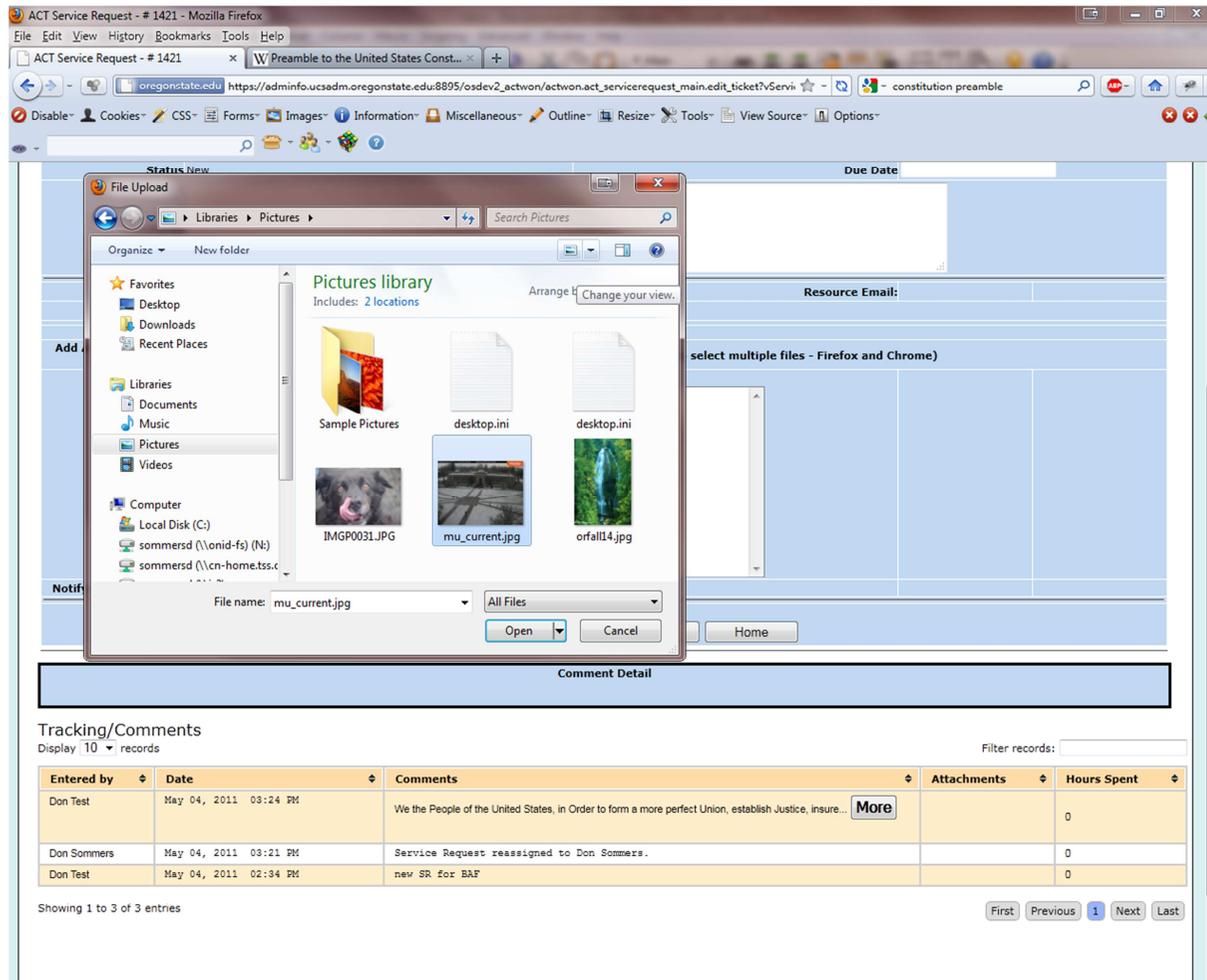
Display 10 records Filter records:

Entered by	Date	Comments	Attachments	Hours Spent
Don Test	May 04, 2011 03:24 PM	We the People of the United States, in Order to form a more perfect Union, establish Justice, insure... <input type="button" value="More"/>		0
Don Sommers	May 04, 2011 03:21 PM	Service Request reassigned to Don Sommers.		0
Don Test	May 04, 2011 02:34 PM	new SR for B&F		0

Showing 1 to 3 of 3 entries

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



The screenshot shows a web browser window displaying a service request form. A file upload dialog box is open, showing the 'Pictures library' with several files selected. The file name 'mu_current.jpg' is entered in the 'File name' field. The dialog box has 'Open' and 'Cancel' buttons. The background shows the service request form with fields for 'Due Date', 'Resource Email', and a 'Comment Detail' section. Below the form is a 'Tracking/Comments' section with a table of entries.

Entered by	Date	Comments	Attachments	Hours Spent
Don Test	May 04, 2011 03:24 PM	We the People of the United States, in order to form a more perfect Union, establish Justice, insure... More		0
Don Sommers	May 04, 2011 03:21 PM	Service Request reassigned to Don Sommers.		0
Don Test	May 04, 2011 02:34 PM	new SR for BAF		0

Showing 1 to 3 of 3 entries

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.

ACT Service Request - # 1421 - Mozilla Firefox

ACT Service Request - # 1421 | W Preamble to the United States Const... | oregonstate.edu | https://adminfo.ucadm.oregonstate.edu:8895/osdev2_actwon/act_servicerequest_main.view_ticket?pSR=1421 | constitution preamble

ACT Service Request - # 1421

Home Search Group Maintenance

Service Request Information

Service Request Contact	Date: May 04, 2011 02:34 PM	Edit Service Request
Name: Don Test		
Email		
Phone		
Customer Group Student Accounts		
Short Description test for BAF demo		
Type Fix	Priority	
Status New	Due Date	
Submitted by Don Test	Submitter Email:	
Resource Don Sommers	Resource Email: don.sommers@oregonstate.edu	
Assign to group ACT		
Attachments mu_current.jpg		

Comment Detail

Tracking/Comments

Display 10 records | Filter records:

Entered by	Date	Comments	Attachments	Hours Spent
Don Test	May 04, 2011 03:48 PM	add attachment	mu_current.jpg	0
Don Test	May 04, 2011 03:24 PM	We the People of the United States, in Order to form a more perfect Union, establish Justice, insure... More		0
Don Sommers	May 04, 2011 03:21 PM	Service Request reassigned to Don Sommers.		0
Don Test	May 04, 2011 02:34 PM	new SR for BAF		0

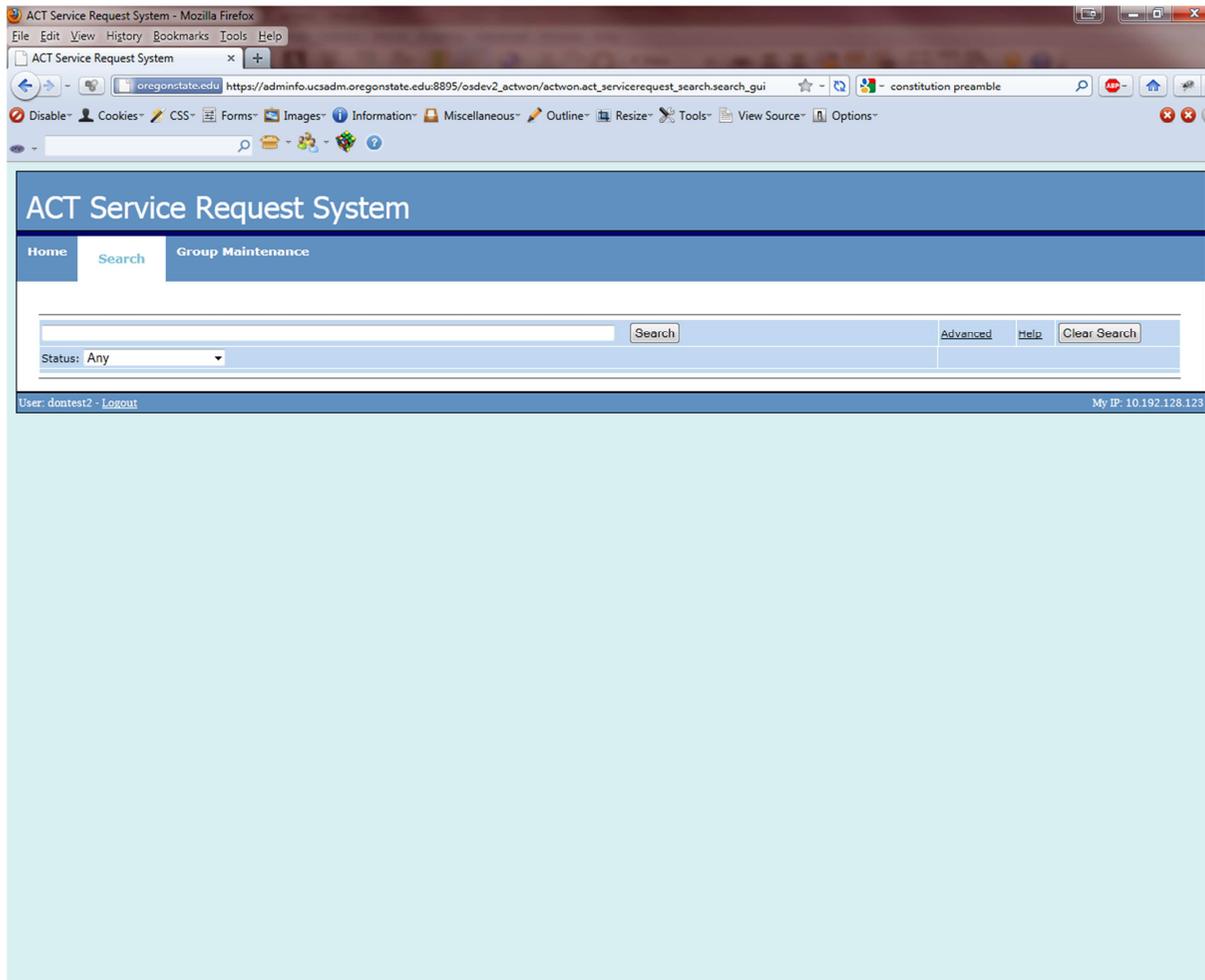
Showing 1 to 4 of 4 entries | [First](#) [Previous](#) [1](#) [Next](#) [Last](#)

Cumulative Hours: 0

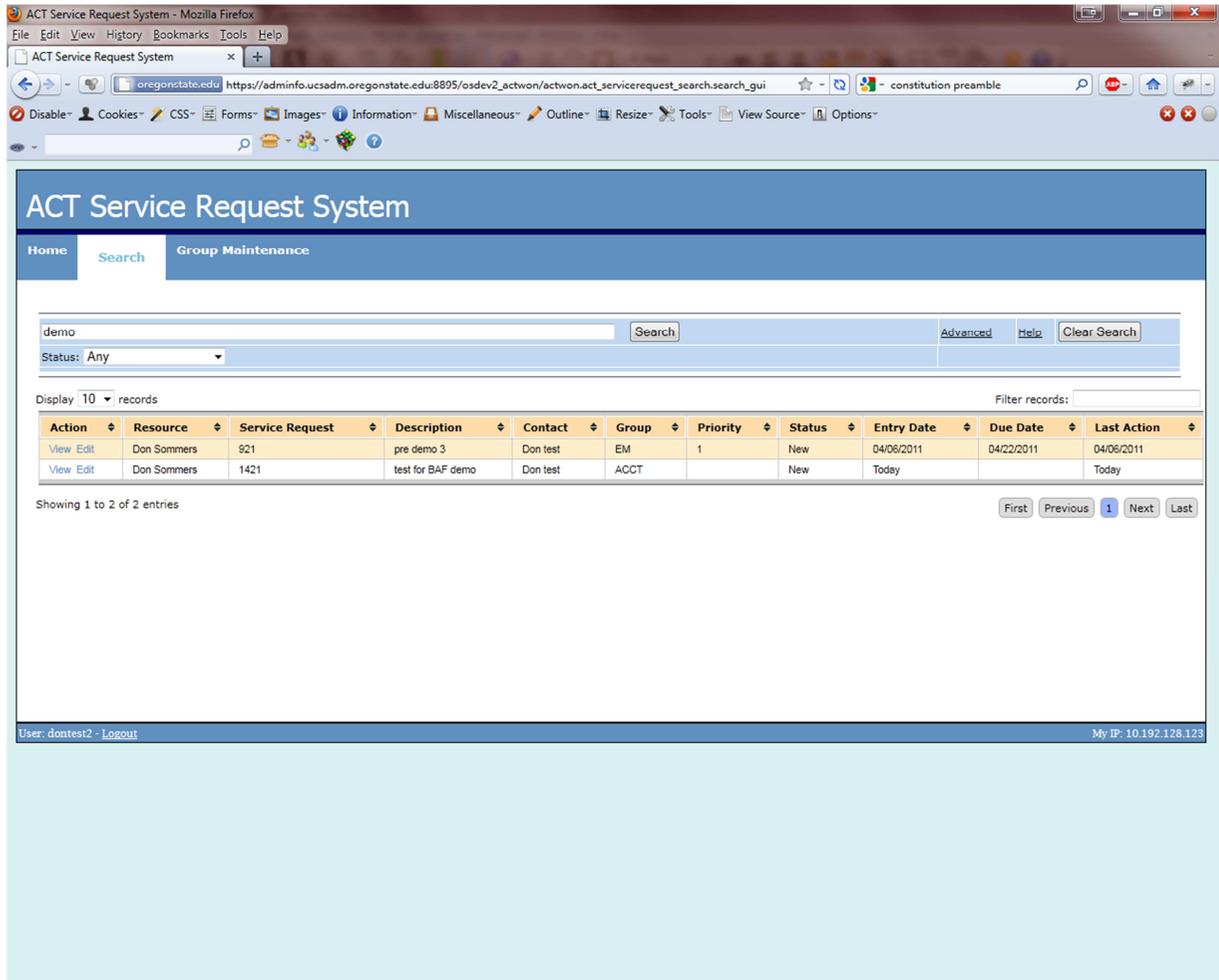
User: dontest2 - Logout | My IP: 10.192.128.123

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.



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.

ACT Service Request System

Home Search Group Maintenance

demo Search Advanced Help Clear Search

Status: Any

Comments
Contact
Resource
Group: Any
Service Type: Any
Date Created: anytime
Date Last Updated: anytime

Save query to my task list: Query name: _____

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

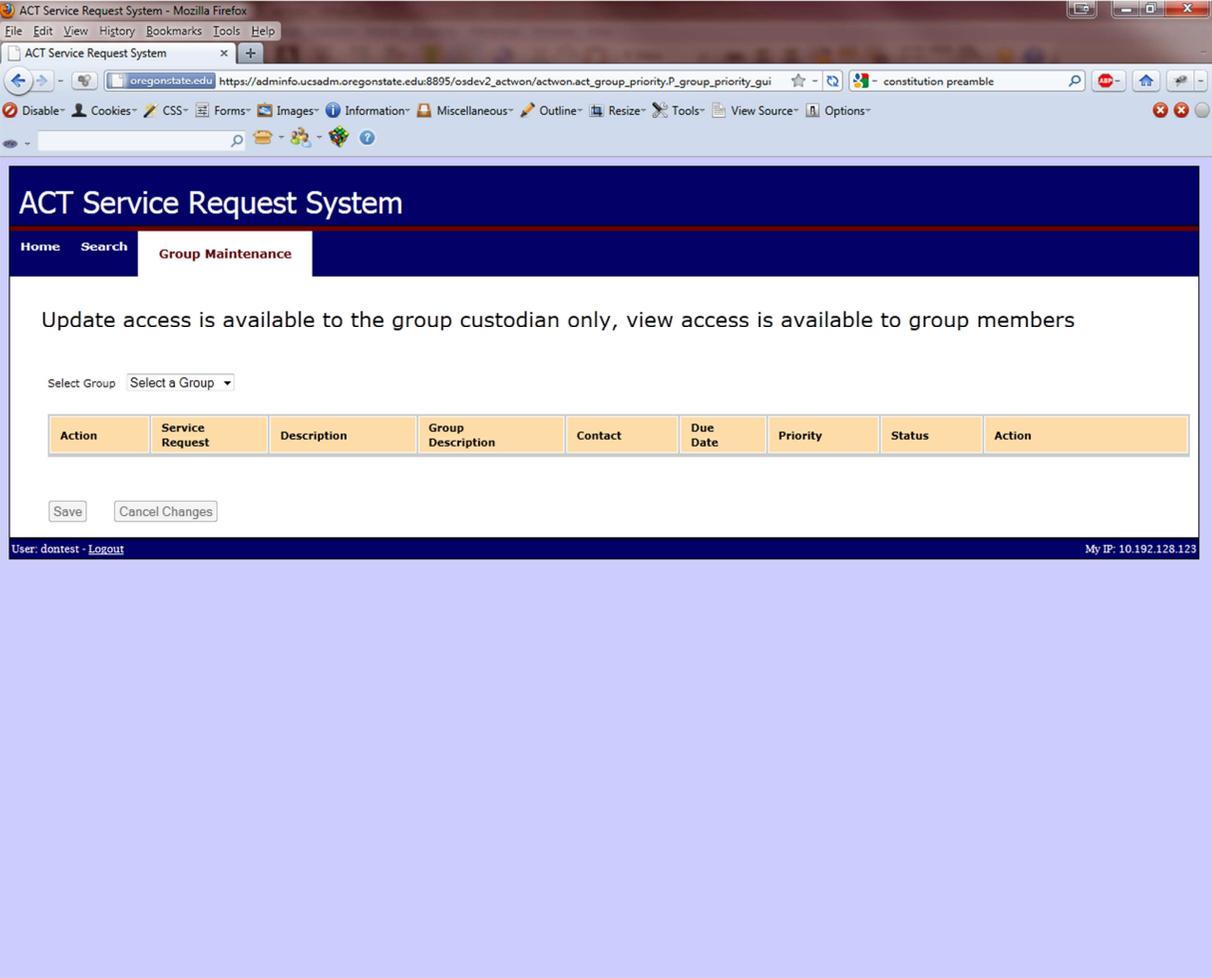
Showing 1 to 2 of 2 entries

First Previous 1 Next Last

User: dontest2 - Logout My IP: 10.192.128.128

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.

ACT Service Request System

Home Search **Group Maintenance**

Update access is available to the group custodian only, view access is available to group members

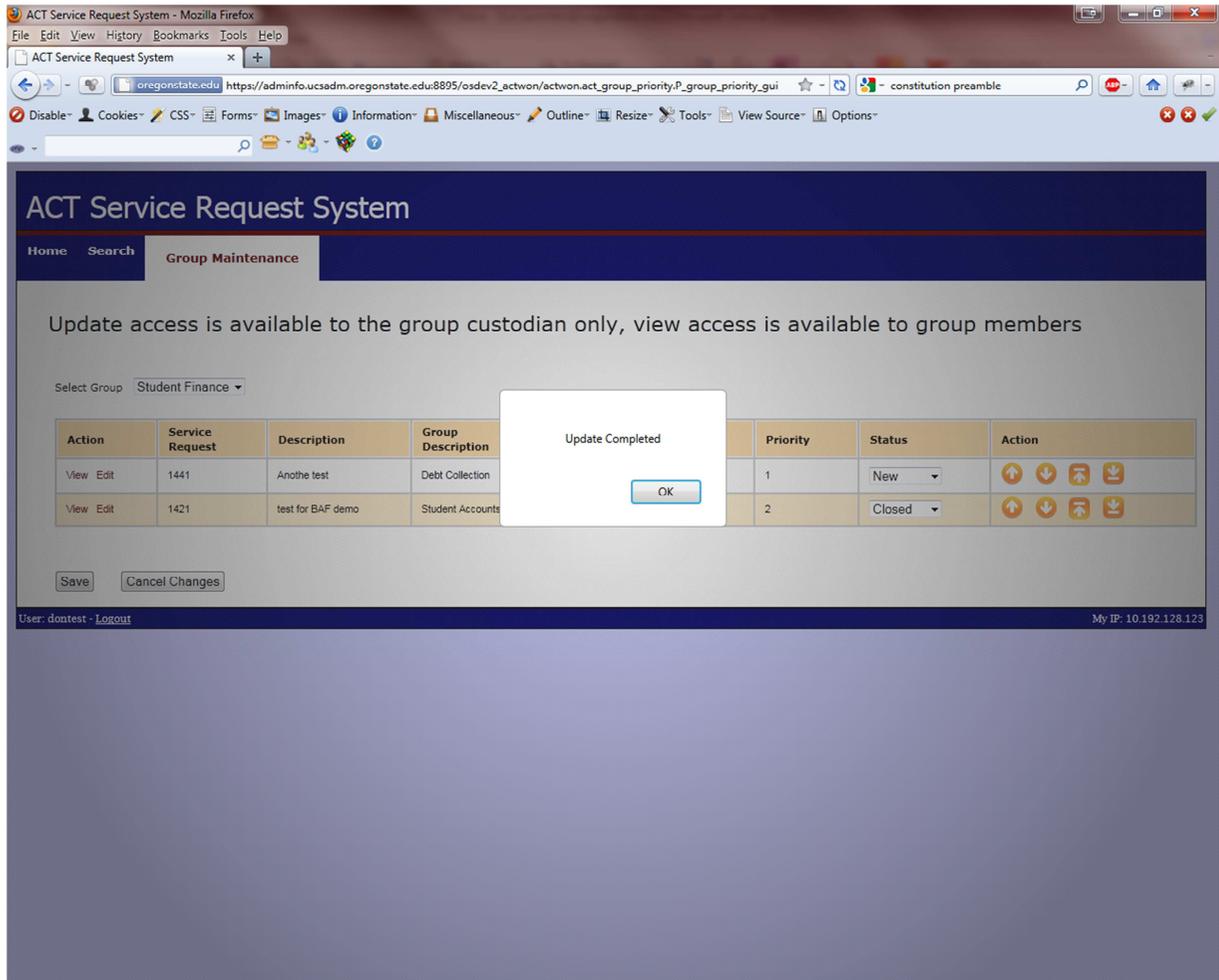
Select Group: Student Finance

Action	Service Request	Description	Group Description	Contact	Due Date	Priority	Status	Action
View Edit	1421	test for BAF demo	Student Accounts	Don test			New	↑ ↓ ↑ ↓
View Edit	1441	Anothe test	Debt Collection	dontest testing			New	↑ ↓ ↑ ↓

Save Cancel Changes

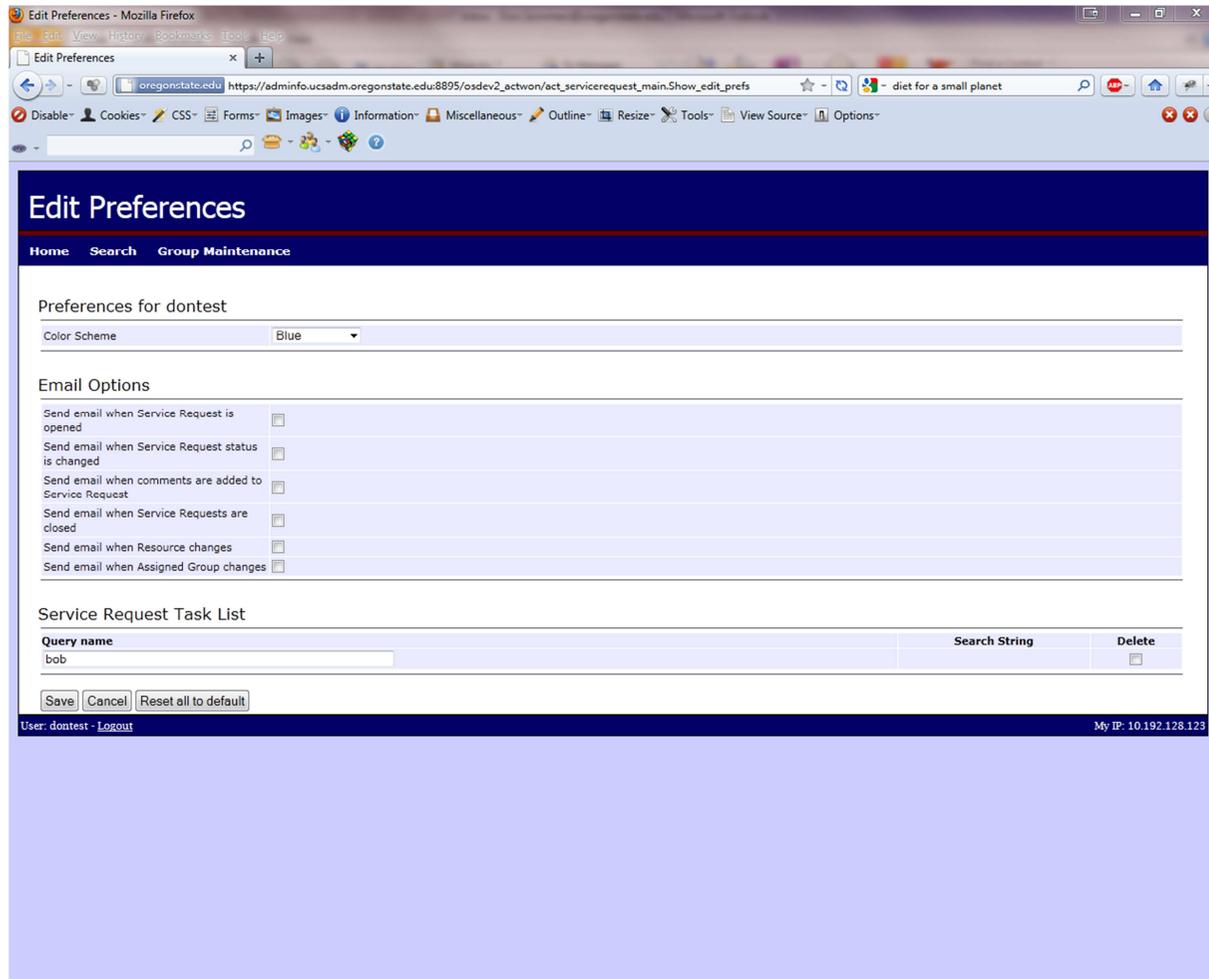
User: dontest - Logout My IP: 10.192.128.123

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.