HelpDesk Ticket Entry Form

Central Office users now have access to the HelpDesk Ticket Entry form to create their own tickets in Oracle PRODMH. Tickets will no longer be emailed to the RFMH Helpdesk account for ticket creation.

The HelpDesk Ticket Entry form can be found in each of the “Specialist” responsibilities. For example: Payables Specialist, Receivables Specialist, Cash Management Specialist, etc.

Ticket Entry

To access the form, log into your Specialist responsibility and then choose HelpDesk Ticket Entry.
Note: Tickets can be entered from any module, for any module. So, you can open a grants ticket from Payables Specialist and vice versa. The same form is being accessed from the different modules.

To enter a ticket, enter the following data: (Listed in tabbing order)

**Priority**
Choose from Critical, High, Average or Low

If your issue is Critical or High Priority, you must also speak directly to an IT member to alert them of the issue. **Critical and High priority are reserved for extremely important or time critical issues. Please discuss the issue with your manager before submitting a ticket with a Critical or High priority.**

**Title**
One sentence or less description of the issue
Requestor: Enter your name, last name first. You can enter a few letters and hit tab to get a shortened list to choose from. Your email address will default into place once a name is chosen.

Problem Description: Enter all the pertinent data about the issue and any details that you can provide that relate to it. Include a description of any steps you have taken to troubleshoot the issue or data you have already checked.

Department: Choose from Executive, Finance, Grants, Human Resources and Payroll and Information Technology

Application: Choose from Cash Management, GL, Grants, Human Resources, Labor Distribution, Payables, Purchasing, Receivables, Website, KBACE, RF Custom Modules, Security, Desktop, Email or Network

Functional Tester: The user ID of the person who will test the change or fix upon completion of the IT work on the ticket.

The remainder of the form is for IT Department use only.

A completed ticket request will look similar to the entry above. Once the form is complete, click the Save icon on your Oracle toolbar.
A dialog box will appear notifying you that the RFMH Helpdesk will receive an email concerning this new issue/ticket. You will also receive an email indicating that a ticket was opened with the pertinent details.

A ticket number was automatically generated when the data was saved on the form. You can use that number to track progress on the ticket. The status is also updated to show a **Submitted** status.
If you re-query the ticket, you will see the updated status of **Submitted**.

**Querying**

To query on the form, click the **F11** key. The form fields turn blue to indicate that you are in query mode.
Place your cursor in the field you want to query on and enter your search argument. Then click Ctrl+F11 to start the query.

(So, to re-query the ticket, place your cursor in the Ticket field and key in 3165. Then click on the Ctrl key and F11 at the same time.)

You can press the F4 key to cancel out of enter query mode at any time.

Attachments

If you have an attachment that you would have attached to an email to the HelpDesk, you can attach it using the paperclip on the form.

To start, click on the paperclip icon on the Oracle Toolbar.
Complete the following fields:

Seq  (Sequence)  Defaults to 10 for the first row. For subsequent rows, add new sequences as needed. Normally they are added in multiples of 10, so that you can insert a row between two existing ones by using a number in between.

Category  Miscellaneous

Title  Add a title for the document you are adding

Description  Add a short description

(Click on the Source tab to see the rest of the fields.)

Data Type  Choose from File, Long Text, Short Text and Web Page

(File is the option to add an attachment.)

URL  Click on this field to open a webpage for attaching files or to add a webpage if the data type was webpage.
To attach a file, click on the **Browse** button and find the location of the file you want to attach.

Choose the file and click **Open**.

The file path is uploaded into the webpage when you return. Click **Submit**.
You will receive a confirmation that the file uploaded successfully. Click the **Close Window** link on the top right of the page to return to the attachments form.

![Decision dialog box](image)

Click **Yes** to indicate that the file uploaded successfully.

The file name is now shown in the **File or URL** field of the form.

Close the **Attachments** form to return to the **HelpDesk Ticket** form.

Re-query using the F11>Enter argument>Ctrl+F11 commands.
The paperclip in the Oracle toolbar now indicates that there is something saved to this record. To open the saved item, click on the paperclip to return to the attachments form.

Click on the row you want to view, as there can be more than one, and click the **Open Document** button.
Ticket Monitoring

Once you create a ticket, you can return to the form and re-query to see if the ticket has been updated at any time. Once the ticket is assigned to an IT staff member, you will receive an email indicating that change.

Once the ticket is actually being worked on, the **Status** will be updated by IT to indicate one of the following statuses:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Queue</td>
<td>Not yet being worked on</td>
</tr>
<tr>
<td>WIP</td>
<td>Work in Process</td>
</tr>
<tr>
<td>Oracle SR</td>
<td>Active SR being worked by Oracle</td>
</tr>
<tr>
<td>Functional Review</td>
<td>Waiting for functional review and feedback</td>
</tr>
<tr>
<td>On Hold</td>
<td>On Hold until future date</td>
</tr>
<tr>
<td>Project</td>
<td>Ongoing Project</td>
</tr>
<tr>
<td>(This is used to link multiple tickets related to the same project.)</td>
<td></td>
</tr>
<tr>
<td>Closed</td>
<td>Request completed or resolved</td>
</tr>
<tr>
<td>Enhancement</td>
<td>Enhancement Request</td>
</tr>
</tbody>
</table>

Functional users also still have access to the HelpDesk reports that can be used to track tickets that belong to a particular department or are assigned to a particular IT staff member.