

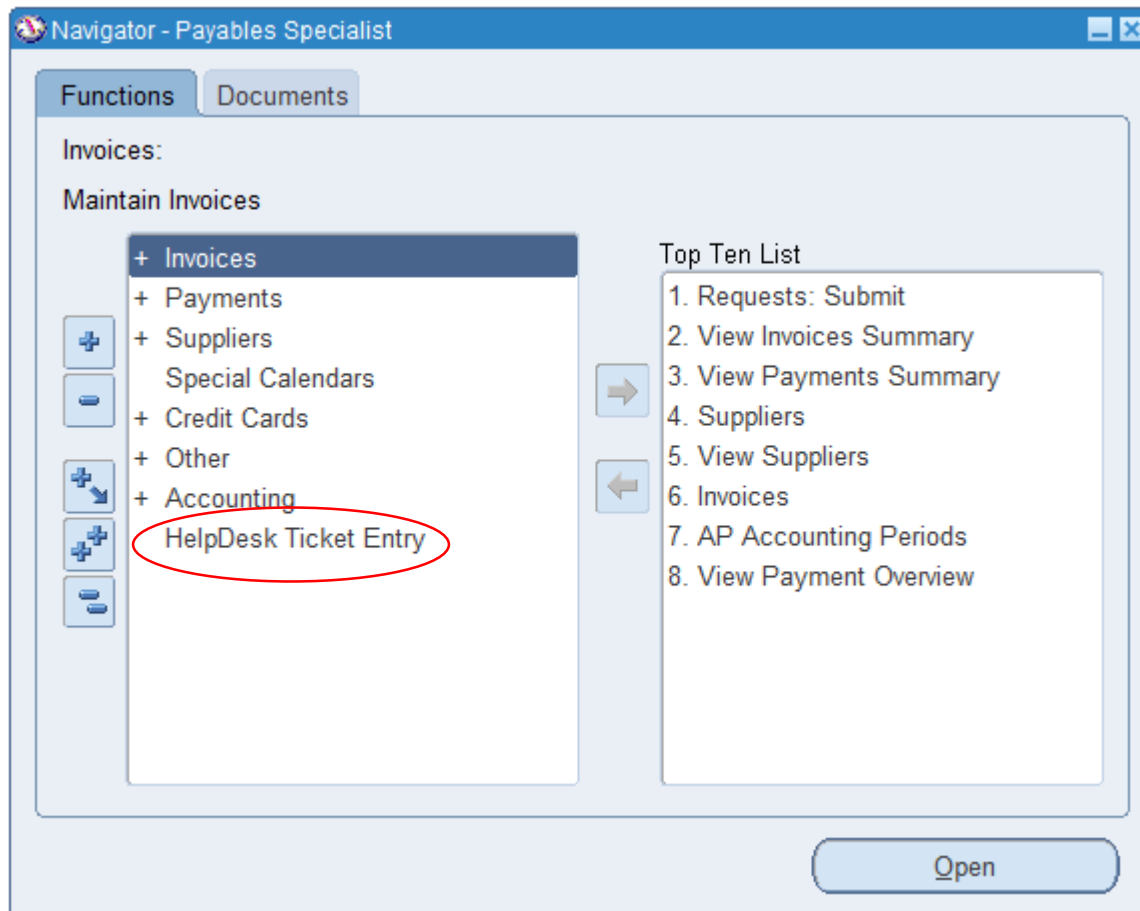
HelpDesk Ticket Entry Form

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.

The screenshot shows a web browser window titled "RFMH Tickets". The form is divided into several sections:

- Top Section:** Contains input fields for "Ticket", "Created", "Priority" (with a dropdown arrow), "Title", "Status", "Requestor", "Phone", "Ext", "Email", and "Organization".
- Problem Description:** A large text area with a vertical scrollbar.
- For IT Department Use:** A section header above the "Issue Resolution" text area.
- Issue Resolution:** A large text area with a vertical scrollbar.
- Right Side Fields:** Includes "Department", "Application", "Functional Tester", "Assigned To", "Functional Review Date", and "Closed Date".

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

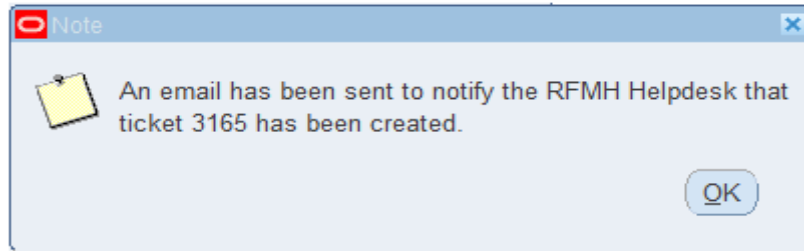
- Requestor** Enter your name, last name first. You can enter a few letters and hit tab to get a shortened list to choose from. Your email address will default into place once a name is chosen.
- Problem Description** Enter all the pertinent data about the issue and any details that you can provide that 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.

The screenshot shows a web form titled "RFMH Tickets" with the following fields and values:

- Ticket:
- Created:
- Priority: Average
- Title: Invoice 123456 will not validate
- Status:
- Requestor: Collins, Grace
- Phone: Ext:
- Email: gcollins@rfmh.org
- Organization:
- Problem Description: Invoice 123456 will not calidate due to a funds check issue. Copy of PSI attached showing funds available. Award was rebaselined and waited for overnight processing and tried again with no success. Exp Item date is within the award and project periods. Award 12345 Project 1001234 Supplier - Schuyler Enterprises #53062
- Department: Finance
- Application: Payables
- Functional Tester: COLLINGR
- For IT Department Use**
- Issue Resolution:
- Assigned To:
- Functional Review Date:
- Closed Date:

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.

Ticket	3165	Created	07-OCT-2015	Requestor	Collins, Grace
Priority	Average	Phone		Ext	
Title	Invoice 123456 will not validate		Email	gcollins@rfmh.org	
Status			Organization		
Problem Description				Department	Finance
Invoice 123456 will not calidate due to a funds check issue. Copy of PSI attached showing funds available. Award was rebaselined and waited for overnight processing and tried again with no success. Exp Item date is within the award and project periods.				Application	Payables
Award 12345 Project 1001234 Supplier - Schuyler Enterprises #53062				Functional Tester	COLLINGR
For IT Department Use					
Issue Resolution			Assigned To		
			Functional Review Date		
			Closed Date		

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.

The screenshot shows the RFMH Tickets application interface. The ticket details are as follows:

- Ticket: 3165
- Created: 07-OCT-2015
- Priority: Average
- Title: Invoice 123456 will not validate
- Status: Submitted (circled in red)
- Requestor: Collins, Grace
- Phone: [Empty]
- Ext: [Empty]
- Email: gcollins@rfmh.org
- Organization: [Empty]
- Department: Finance
- Application: Payables
- Functional Tester: COLLINGR

The Problem Description field contains the following text:

Invoice 123456 will not calidate due to a funds check issue. Copy of PSI attached showing funds available. Award was rebaselined and waited for overnight processing and tried again with no success. Exp Item date is within the award and project periods.

Award 12345 Project 1001234 Supplier - Schuyler Enterprises #53062

Below the Problem Description is a section titled "For IT Department Use" containing an "Issue Resolution" field and an "Assigned To" field. The "Assigned To" field is currently empty. Below the "Assigned To" field are three more empty fields labeled "Functional Review Date" and "Closed Date".

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.

The screenshot shows the RFMH Tickets application interface in query mode. All form fields are highlighted in blue, indicating that the application is in query mode. The fields are the same as in the previous screenshot, but they are all highlighted in blue.

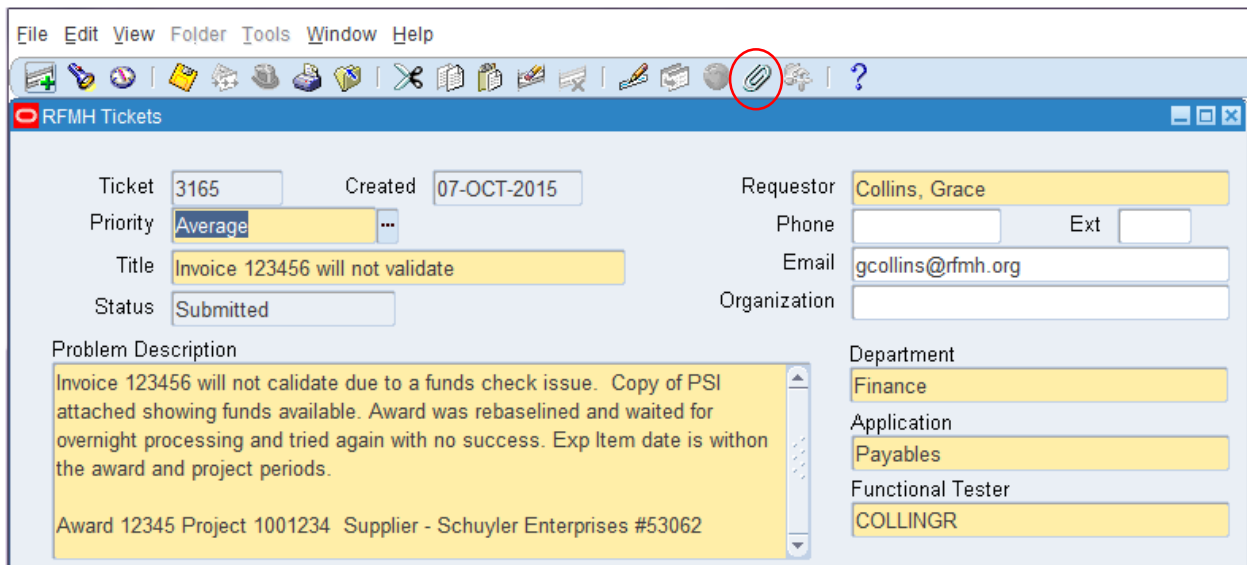
Place your cursor in the field you want to query on and enter your search argument. Then click **Ctrl+F11** to start the query.

(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.



The screenshot shows a web browser window titled "RFMH Tickets". The browser's Oracle Toolbar is visible at the top, with a paperclip icon circled in red. The form contains the following fields:

Ticket	3165	Created	07-OCT-2015	Requestor	Collins, Grace
Priority	Average	Phone		Ext	
Title	Invoice 123456 will not validate				
Status	Submitted				
Problem Description				Department	Finance
Invoice 123456 will not calidate due to a funds check issue. Copy of PSI attached showing funds available. Award was rebaselined and waited for overnight processing and tried again with no success. Exp Item date is within the award and project periods.				Application	Payables
Award 12345 Project 1001234 Supplier - Schuyler Enterprises #53062				Functional Tester	COLLINGR

To start, click on the paperclip icon on the Oracle Toolbar.

Seq	Category	Title	Description	May Be Changed
10				<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Entity Name: RFMH Help Desk User

Include Related Documents

[Publish to Catalog](#) [Document Catalog...](#)

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

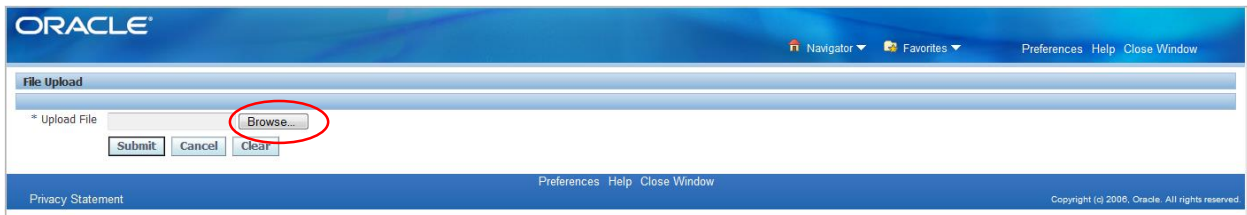
Description Add a short description

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

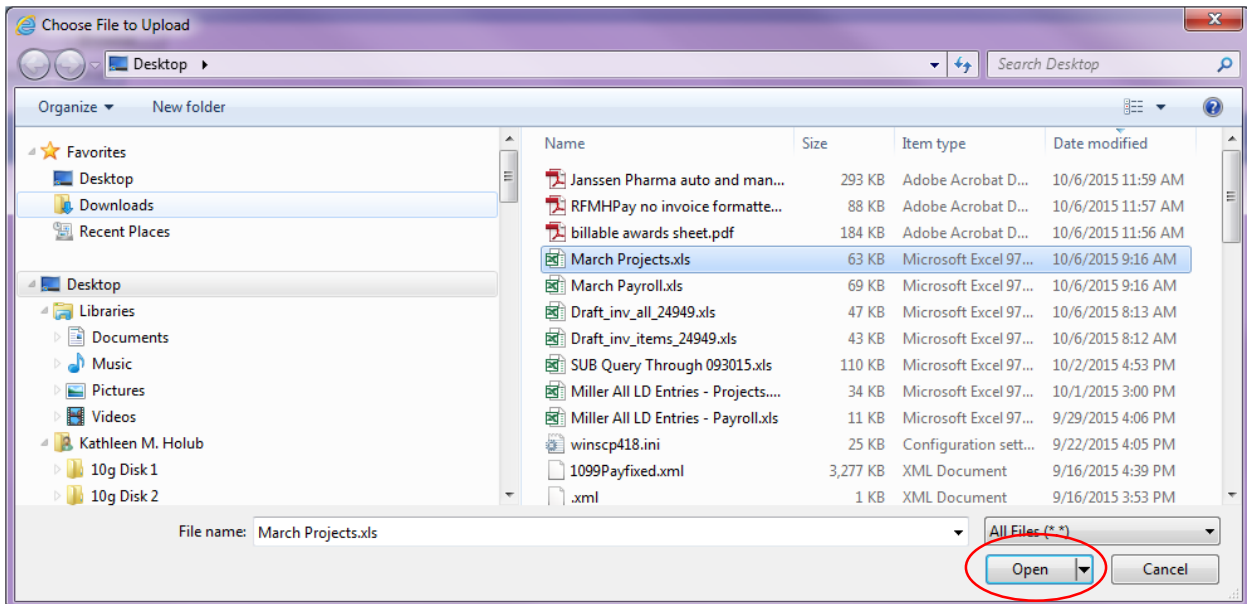
Data Type Choose from File, Long Text, Short Text and Web Page

(File is the option to add an attachment.)

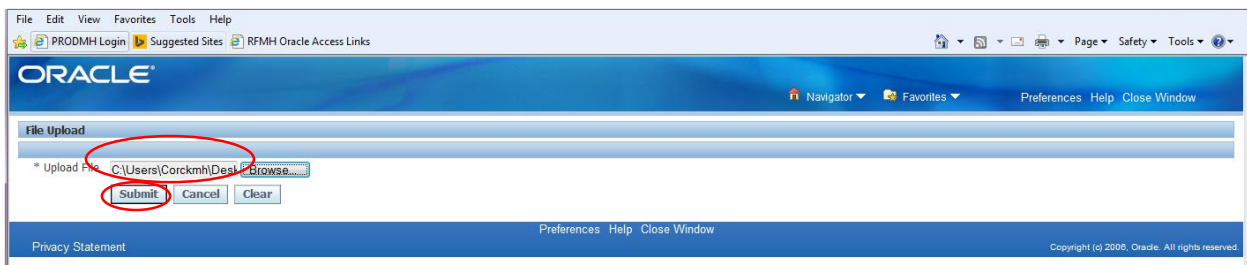
URL Click on this field to open a webpage for attaching files or to add a webpage if the data type was webpage.



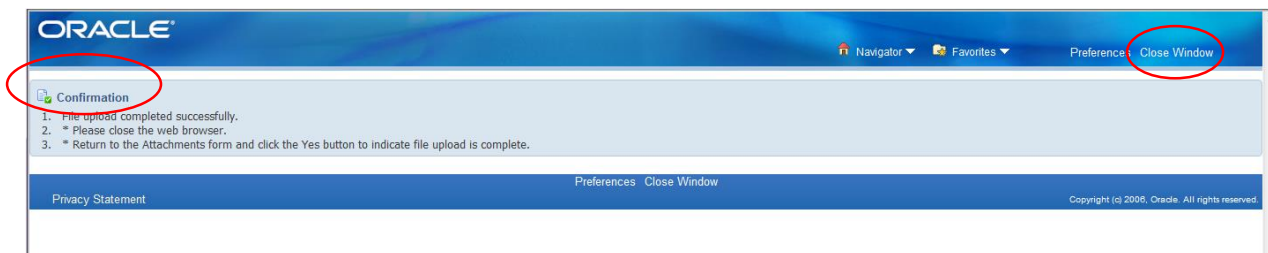
To attach a file, click on the **Browse** button and find the location of the file you want to attach.



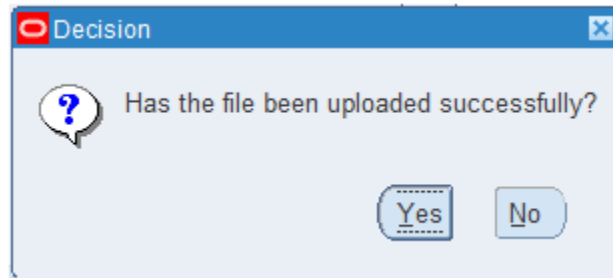
Choose the file and click **Open**.



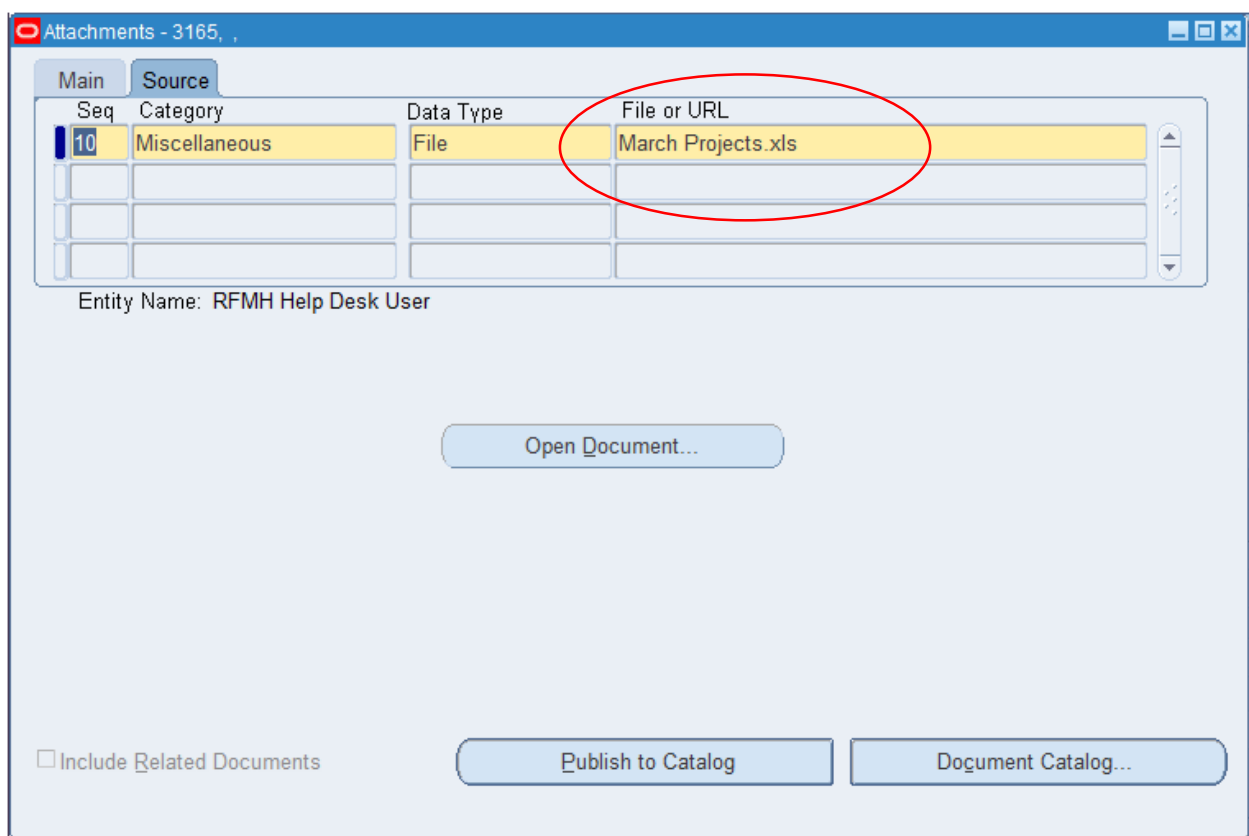
The file path is uploaded into the webpage when you return. Click **Submit**.



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.



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.

File Edit View Folder Tools Window Help

RFMH Tickets

Ticket Created

Priority ...

Title

Status

Requestor

Phone Ext

Email

Organization

Problem Description

Department

Application

Functional Tester

For IT Department Use

Issue Resolution

Assigned To

Functional Review Date

Closed Date

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:

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

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.