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SECTION 1
INTRODUCTION

FootPrints is a web-based customer support tool. It is designed to help track, manage, and improve service activities throughout Information Services. Footprints is the software used to request staff accounts from Information Services.

A. FootPrint Account Requesters

Information Services maintains a list of designated Account Requesters. A list of account requesters is located on our website at:
http://www.uregina.ca/is/assets/docs/pdf/account-creation-contact-list.pdf

Note: FootPrints account request tickets must be entered by area administrators and cannot be entered by direct calls to the IT Support Centre (ITSC). However, the ITSC will inform customers who their contacts are.
B. Account Workflow

Seven areas within Information Services and 1 department outside of Information Services are involved in account creation and deletion. It is important to enter a FootPrints ticket instead of calling Information Services staff. Inquires should be directed to the IT Support Centre at 585-4685 and they will forward to the appropriate staff member or back ups.
Footprints Account Requesters

Workflow Summary

Start
Ticket submitted by Account Requestor
Assigned to ITSC
ITSC verifies/creates Userid
ITSC complete **
FP-1A Email/Novell requested *
Assign to Email team
Notify Email, Network
Email complete
FP-2A Assign to Network
Email to Network queue
FP-3A Network checks if Dept Server access needed
Mark for assignment to Academic Research Team
Dept Server complete
Network complete
FP-1B Banner and/or FAST requested *
Assign to Banner
Banner/FAST Complete *
FP-2B Requisition Approval requested
Assign to and notify Finance team
Finance Complete * (updated by Finance user)
Tasks marked as complete?
FP-4 Assign to ITSC for User contact (by phone) and letter generation
ITSC Letter Sent
FP-5 Close ticket
Email to Requestor
End

Notes
* Marked as complete by system if not selected by user (escalations defined in Footprints)
** Always set manually
FP# - Footprints escalation number
SECTION 2
INTRODUCTION

A. Location and Login

To Login to FootPrints:

1. Open Internet Explorer
2. Go to http://footprints.cc.uregina.ca/footprints/acctreq.html
3. Enter User ID and Password (your Novell username and password)
4. Select Login

B. Parts of the Screen

1. Home icon returns you to the home area at anytime while filling in a ticket
2. New Request icon opens a new account request ticket
3. My Requests drop down menu allows you to view tickets either by:
   A. My Active Requests
   B. My Closed Requests

   Note – Leaving the drop down on My Requests will display all request (active and closed)
4. The ticket Title (hyperlinked in blue) can be clicked on for more details
5. Status column show the status of the ticket (Active or Closed)
6. Log Out icon
SECTION 3
SUBMIT REQUEST

A. FootPrints Location
Access the Footprints website at the following address:
http://footprints.cc.uregina.ca/footprints/acctreq.html
Use Novell username and password to login. If you have trouble logging in please call the ITSC at 4685.

B. Submiting a New Request

Select New Request – from top menu

1. Submit a new Request Block

A. Use the ‘Select’ drop down Menu to choose from one of the pre-defined Account Request option or continue as a generic Account Request

B. Title* – Account Request will be chosen

2. Your Personal Information Block
Auto fills with administrator’s information. If your information does not auto fill please contact the ITSC at 4685. PLEASE DO NOT ENTER THE NEW EMPLOYEE HERE.

3. Ticket Information Block

- Who is this request for – enter Employee ID and name of the recipient. Position Number is required for new accounts and Banner permissions.
- **Problem Type** - Select New Account, Account Change, Term Extension or Delete Account
- **Employee ID** - Search Banner for ID, if no ID found, contact HRSupport@uregina.ca to set up.
- **Employee First Name** – use legal name as it appears in Banner
- **Employee Surname** – use legal name as it appears in Banner
- **Position #** - used for Banner security access

Note: A new position may not have Banner security assigned to it. This applies to casual students, co op students, FNUC, Luther, and Campion. Email caspur.security@uregina.ca if need assistance.

- **Novell Username** – Enter if known; required for Account Change
- **Department** – Enter department of employee

4. Select Staff Type and enter dates

- Enter **Staff Type** - Select Permanent Staff, Casual, Sessional or Term Staff
- Enter **Start Date or Effective Date**
- Enter **End Date** - not mandatory for permanent staff but is for other staff types
5. Network, Email Access

- Select if needed
- **Novell/Email** – Users will receive both unless otherwise specified in the Description area
- **Folder Permissions** - add network or folder access to drives. Example: read/write access T:\comperv\UofRTraining. Also include access to department servers in this area Example: CS server.


- Select if needed.
- Position number determines Banner Security unless Banner Security Groups are selected.
- If determining new Banner access, please select ALL groups for the position, not just additions (use Ctrl-Click to select more than one option).
- A full list of Banner groups is available at: [http://www.uregina.ca/compserv/training/banner_security_groups.shtml](http://www.uregina.ca/compserv/training/banner_security_groups.shtml)

Note: A new position may not have Banner security assigned to it. This applies to casual students, co op students, FNUC, Luther, and Campion. Please use the ‘Banner Security Groups’ box to determine access or caspur.security@uregina.ca if assistance is needed.

7. FAST Access

- Select if needed, enter Fund – Org codes
- **FAST Fund-Org codes** – add as appropriate. Attach file if needed.
8. **PAPERCUT SETUP: Printing access to Lexmark Devices**

- Provide FOAPAL, Name for FOAPAL and $ restriction (if applicable) for each account the user needs access to

9. **Finance Information**

- Check all that are needed

10. **HR Payroll SetUp**

- Originator may enter Electronic Personnel Action forms in Banner and Approver may approve

- **EPAF Org Codes** - supply regardless of access selected.

11. **Phones**

- Complete details listed if a phone is needed
12. Web Timecard Setup

- Check if SuperUser or Approver access to Web Timecard is needed (regular employee access is setup by SuperUsers in each department)

13. Description

- Enter special notes
  - Specific Banner access not associated with the position #,
  - Users that do not need an email account
  - Any other important information
- You can type an unlimited amount of text in this box.
- Make sure the appropriate check boxes are selected above. The check boxes are what initiate contact to the area that is processing the ticket.

14. Attach a File (optional)

- Attach one or more files to the Ticket from your local network drive(s).

15. Submit Ticket

- When you are ready to submit the ticket, click SAVE.
- If Footprints detects that you have left a mandatory field blank a message is displayed instructing you to go back and fix the ticket.
- The ticket displays on your Footprints homepage.
- You will receive email notification when the ticket is complete
SECTION 4
VIEW MY REQUESTS

To view a ticket that has been submitted:

1. Open Internet Explorer
2. Go to [http://footprints.cc.uregina.ca/footprints/acctreq.html](http://footprints.cc.uregina.ca/footprints/acctreq.html)
3. Enter User ID and Password (your Novell username and password)
4. Select Login
5. A list of submitted tickets appear on the home page
6. The status is displayed
   - Closed – account request is complete
   - Active – pending completion; check column headings for status
7. To view more ticket details select the Ticket Title (in blue) in the Title column.
SECTION 5
EMAIL WHEN CLOSED

An email notification will be sent to the requestor when the Ticket is closed.

>>> IT Support <IT.Support@uregina.ca> 12/7/2007 2:09 PM >>>

Notification of Ticket Escalation

This request for a new, changed account or account deletion has been completed. If you have any questions or concerns regarding the work performed, please contact the IT Support Centre by email IT.Support@uregina.ca or phone 585-4685.

Ticket: Account Request
Ticket Number: 64

Priority: Normal    Status: Closed
Creation Date: 2007-12-07    Creation Time: 13:49:56

Ticket Information:

Position #: CSC070
SECTION 6
PRINTING

To print a ticket that has been submitted:

1. Open Internet Explorer
2. Login to Footprints
3. Click on the ticket title
4. The ticket will open to show ticket details
5. In your browser select File, Print
6. Select browser back button to return to the original ticket.
SECTION CASPUR REPORTS

To view Banner access:

1. Open Caspur Reports
2. Click on CATS Menu
3. Double click on “New PBS Audit report”
4. Enter Banner username and password

5. Enter a Banner username into Username field and select Get User – OR –
6. Enter a Position into the Position field and select Get Position
7. Current Banner access will appear in Results area.
APPENDIX A
OPTIONAL CHECKLIST

This is a checklist for staff hires. Your actions may vary depending on the type of employee: Non-employees, CUPE, APT, Faculty, Out-of-Scope, Student Assistant, or Research Assistants. Please feel free to add to this list as needed.

A. Human Resources Information:

☐ Copy of Job Posting
☐ Copy of Resume
☐ Copy of Letter of Offer
☐ Enter an Electronic Personnel Action (EPAF) form in Banner ______EPAF tran#
☐ Name:

☐ Check Banner for ID#:

☐ If no ID request from HR HRSupport@uregina.ca with the following information (full legal name, preferred name, date of birth, mailing address, business address, business phone).
☐ Position #

☐ Position # will be used for Banner access if requested in FootPrints. Changes to Banner access above position bases security should be sent to caspur.security@uregina.ca
☐ Start date:

☐ Web Time Card - Set up employee in employee management
☐ End date, if applicable:

☐ Web Time Card – Note end date in calendar to exit in proper pay period
☐ Note End date in calendar to enter FootPrints Account Request to cancel accounts
☐ Tax forms, Union forms, Direct deposit forms
☐ Forward paper work to HR
B. Information Services Information:

☐ Enter FootPrints Account Request
☐ FootPrints ticket number for reference: ______________
  ☐ Novell/Email account
  ☐ Banner account (based on position number)
  ☐ FAST access
  ☐ FAST Fund-Org codes needed
  ☐ Novell folder permission (Ex. read/write to T:\Clerisy\UofR Training\manuals)
  ☐ Phone # _________________________
  ☐ Title for U of R Directory________________________________________
  ☐ Voicemail
☐ Add name to GroupWise address book department distribution list - Additional Comment in FootPrints ticket.
☐ Sign employee up for computer training. www.uregina.ca/training GroupWise, Intro to U of R Software.
☐ Send appropriate training manuals to employee. Password protected, username: manuals password: tlc www.uregina.ca/training

C. Financial Services Information:

☐ Finance Information ***Forward paperwork to Financial Services
  ☐ Requisition Approval
  ☐ APEA account
  ☐ Faculty Research account
  ☐ Requisition Approval org codes__________________________

D. Human Resources Information:

☐ Human Resources
  ☐ Electronic Personnel Action access in Banner, originator or approver
  ☐ Electronic Personnel Action org codes__________________________
E. Department Information:

- Assign Office
- Order name plate for door
- Order copier card or copier access number:
  - Order Keys from Physical Plant work.control@uregina.ca
  - Office
  - Department
  - Outside door
  - Additional
- Web Mark Entry if required, contact the Registrar's Office. Must be approved by Dean or Designate.
- WebCT if required (request form available at [www.uregina.ca/webct](http://www.uregina.ca/webct))
- Email on Web (faculty only) – uncheck ‘Display on Web field’ for UR Self-Service
- Prepare Department/Unit Orientation Materials
- Set up GroupWise proxy access if required.
- Emergency contact information
- Send Time Card instructions if using WTIME. http://uregina.ca/training/Other/Employee.doc
- Order Name tag

F. Supply Management Information:

- Purchasing card application and training session: [http://www.uregina.ca/sms/pcardapp.shtml](http://www.uregina.ca/sms/pcardapp.shtml)