# Table of Contents

SECTION 1 INTRODUCTION ................................................................................................. 1  
SECTION 2 INCIDENT MANAGEMENT PROJECT ............................................................. 3  
SECTION 3 MY PREFERENCES ............................................................................................ 5  
SECTION 4 CREATE TICKETS ......................................................................................... 7  
SECTION 5 EDIT TICKETS .............................................................................................. 17  
SECTION 6 PRINTING ..................................................................................................... 20  
SECTION 7 SEARCHING ................................................................................................. 22  
SECTION 8 KNOWLEDGE BASE – TEAM LEADERS ONLY ............................................... 24  
SECTION 9 FLASHBOARD .............................................................................................. 26  
SECTION 10 REPORTS ................................................................................................... 28  
SECTION 11 FOOTPRINTS ONLINE FORM .................................................................... 30  
SECTION 12 WORKFLOW SUMMARY .......................................................................... 32  
SECTION 13 ACCOUNT REQUESTER PROJECT ............................................................. 36
SECTION 1
INTRODUCTION

Numara FootPrints is a web-based customer support tool. It is designed to help track, manage, and improve service activities throughout Information Services.

A. Concepts

Projects
Footprints stores and tracks information in Projects. A Project is a separate sub-database within the system. Example of a Project is Incident Management or Account Creation.

Agents
Each person who logs into FootPrints is considered an agent. Some agents are standard users while others may be team leaders or system administrators.

Tickets
Each request or Ticket can be entered directly into FootPrints or on a web form. A ticket logs an event or problem. Each ticket will have a unique number.

Quick Tickets
Quick tickets are templates that contain pre-filled information to speed creation, usually requires only customer information to be entered. Example of a Quick Ticket is PIN reset and virus services.

Customers
In the Incident Management Project the customer is the end-user requesting the ticket. Customers may enter incident management tickets using the ITSC online web form or calling the IT Support centre. Account Requesters login to a different customer area and enter the ticket themselves.

Work Queues
Information Services has a number of Work queues. Each queue will have a team leader responsible for checking the queue daily. When assigning ticket always assign to a queue not an individual to prevent tickets stalling during holiday or absences. Examples of work queues are Computer Training Team, Applications Team, and Banner Security Team.
B. Responsibilities

**Ticket Owner**
The person or queue currently assigned to the ticket is responsible for the ticket.

**Work Queues**
Each team leader is responsible for monitoring and assigning their work queue

**Incident Process**
The owner of the incident process is the Manager of Customer Support Services

**Incident Management Framework**
The owner is the Manager of Quality Assurance

*Note: Staff may enter tickets for any direct calls to them. Please remind the caller to contact ITSC in the future to ensure that the ticket will be handled appropriately.*

C. FootPrints Location for Agents

**To Login to FootPrints:**

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

*Note: Although FootPrints may be used in other browsers, it prefers Internet Explorer for full functionality.*
SECTION 2
INCIDENT MANAGEMENT PROJECT

A. Projects Home

FootPrints stores and tracks information in Projects. In FootPrints, agents may select the preferred Project to display.

To select a project such as Incident Management or Account Requests:
1. Login to FootPrints
2. Select the Project, in the upper right

To access Active Project Totals:
1. The Active on the left are tickets with the status of Active
2. The Active on the right are tickets with any active status excluding ‘closed’ and including ‘work completed’

B. Display Assignments

The most common will be ‘My Assignments’ and ‘My Assignments in all Projects’ but you are not limited to only two. Some IS staff will be checking Team Assignments such as ‘Network Assignments’ or ‘Computer Training Assignments’.

To display My Assignments:
1. Login to FootPrints
2. Select the Project ‘Incident Management’ if not already selected
3. Select Display: My Assignment
   – OR –My Assignments in all Projects
   – OR –My (Queue) Assignments
4. Tickets in that assignment will be displayed
SECTION 3
MY PREFERENCES

A. Setting Preferences

Preferences are located on FootPrints side menu. Each Agent may choose settings that meet individual needs. There are six preference areas: General, Homepage List, Appearance, Tickets, Security, and Misc. You may set different preferences for different projects.

B. Suggested Preferences

The following are suggestions only and agents are not limited to the below list.

<table>
<thead>
<tr>
<th>Preference Area</th>
<th>Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Name</td>
</tr>
<tr>
<td>General</td>
<td>Primary Email Address for notifications</td>
</tr>
<tr>
<td>General</td>
<td>Checkmark: 'Send notification emails to this Address</td>
</tr>
<tr>
<td>Default Project</td>
<td>Default Project: Incident Management</td>
</tr>
<tr>
<td>My Assignments in All Projects</td>
<td>My Assignments in All Projects and other appropriate lists</td>
</tr>
<tr>
<td>Auto-refresh Interval: Refresh Every 15 Minutes</td>
<td>Auto-refresh Interval: Refresh Every 15 Minutes</td>
</tr>
<tr>
<td>Sort List by: Priority</td>
<td>Sort List by: Priority</td>
</tr>
<tr>
<td>Secondary Sort Field: Status</td>
<td>Secondary Sort Field: Status</td>
</tr>
<tr>
<td>Homepage Columns: Add Field Description</td>
<td>Homepage Columns: Add Field Description</td>
</tr>
<tr>
<td>Submitted By</td>
<td>Submitted By</td>
</tr>
<tr>
<td>No changes necessary</td>
<td>No changes necessary</td>
</tr>
<tr>
<td>Automatic Spell Check: Enable</td>
<td>Automatic Spell Check: Enable</td>
</tr>
</tbody>
</table>

To edit preferences:
1. Login to FootPrints
2. Select My Preferences from the side menu
3. Edit as necessary
4. In Apply Changes area, enter password
5. Select GO for the changes to be applied
SECTION 4  
CREATE TICKETS

When an Agent creates a ticket there are 10 sections to complete. They are: New Ticket, Customer Information, Ticket Information, FOAPAL information, Billing Information, Description, Assignees, Emails, Time Spent, and Attachments.

*Mandatory fields are highlighted or marked with an asterisk.

A. Title, Priority, and Status:

To enter new ticket information:
1. Login to FootPrints
2. Select Create Ticket from side menu
3. Title*: please enter a meaningful title
4. Priority*: If not medium change priority to critical, urgent, high, low, or pending

Critical (Initial Response 10 min and Resolved in 1 day): An emergency situation such as the loss of an essential service and the system is unrecoverable, or a large number of users are affected and are unable to perform a significant portion of their job. Example: System Outage, Smart Classroom Problem, Entire Department cannot work.

Urgent (Initial Response 2 hrs and Resolved in 1 day): A situation where there is loss of a major function to the client (multiple users) which severely impacts the service. Example: Entire Department affected

High (Initial Response 1 day and Resolved in 2 day): A user cannot work, or several users are affected. Example: System down, Virus affecting the network, forgot password

Medium (Initial Response 2 days and Resolved in 5 days): Problems of minimal impact. The user can still work or a temporary workaround is in place. Example: Printer install, Computer noise, home machine and they work from home, Work machine virus but they can still work, Student system virus cleanup, Caspur Reports enhancements

Low (Initial Response 5 days and Resolved in 10 days): Problems of no impact and which have low or no impact on the ability to provide service. Example: Software install, home machine and they don’t work from home

Pending (Initial Response ‘ongoing’and Resolutions depends on the priority): Requests received via the web form are given an initial assignment of ‘Pending’. These requests are reviewed by IT Support and an appropriate priority is assigned. IT Support monitors this queue constantly.
5. **Status**: If not active change status.

- **Active**: open ticket with work in progress
- **Need More Info**: more information required from the user
- **Pending**: work has not been started
- **User Testing**: user is testing the solution
- **Waiting for Parts**: this ticket is waiting for parts
- **Follow Up Required**: ticket is postponed to a certain date that must be entered in the Follow Up Date field for an escalation to send out a reminder email on this date
- **Project**: Do not use this status
- **Work Completed**: assignee/team completes their part of the ticket
- **Ready to Invoice**: Network and Team Leaders use this status only.
- **Closed**: ticket is closed and locked

---

**Note**: Any tickets without Resolution after 16 days will prompt an email to the Assistant Director of the area and any ticket over 30 days old will prompt an email to the Director of Information Services.
B. Customer Information:

To find a customer:
1. In an existing ticket
2. Enter a portion of the Last Name*: or the entire and select enter.
3. If there is a match other fields like ID and email will populate.
   OR
4. Use the Select Customer icon to search
   a. In advanced search, type portion of Name and Enter OR
   b. Click on letter links
   c. All matches appear
   d. Select the underlined last name of Customer and it will populate Customer Information area
   e. If no match, re-search select Search Icon
   f. Select History icon to see other tickets associated with the Customer
   g. Select Clear icon to delete customer and re-search

To add a customer temporarily:
1. If no match appears. Please fill in Last Name, First name, Email Address, and ID in the Customer Information area
2. This will not add to the customer database and only applies to this ticket only
C. Ticket Information:

To enter ticket information:
1. In an existing ticket
2. Classification*: defaults to Incident, select service request, information request, or application change if applicable
3. Submit method: defaults to phone, select appropriate
4. Follow-up Date: if entered will prompt an email to assignee and supervisor on selected date
5. Problem Type*: make a selection. Example: applications, hardware,
6. Category: choices are dynamically connected to the Problem Type* chosen
7. Symptom: optional
8. Service Location: optional
9. Barcode: optional Technician support must enter this field.
10. Platform*: defaults to Windows XP
11. Evergreen replaced?: checkbox is appropriate.
12. Evergreen Repl Barcode: optional
13. Warrenty or SLA: optional SLA equals ‘service level agreement’
D. Financial Account Information (FOAPAL)

I. How to ask for FOAPALS

Collection of Foapal numbers and use of default numbers:
1. ITSC Call Centre staff will continue to request an account number from callers when a call is received
2. They will ask up to 2 times for a number and will validate the number
3. ITSC will determine if the account number is valid using the Caspur FOAPAL number validation report.
4. If no valid number is provided on the 2nd attempt, the caller will be asked to send one as soon as possible, but if not provided by the time the problem is resolved, then the invoice routine will use a default number

II. Entering FOAPALS

To enter FOAPAL information:
1. In an existing ticket
2. FOAPAL No: Example, 10000-3345-6400. Please include Fund-Org-Acct when entering this field
3. FOAPAL Valid?: Select yes, no, or didn’t know. Validate the FOAPAL using the Caspur Report
4. Invoice-Dept*: mandatory

Note: There is a FOAPAL Validation report in Caspur to be used to determine a valid account.

III. Validating FOAPALS

To run the Valid Foapal Report:
1. Open Caspur Reports
2. Select Information Services Menu
3. Select the Foapal Validation Report
4. Enter the FOAPAL using dashes and select The Validate button
5. Status will be Valid or Invalid
E. Billing Information – Team Leaders Only

To enter Billing information:
1. In an existing ticket
2. Invoice: select method
3. Flat fee Description: use for Virus Removal
4. Flat Fee Rate: will default based on the Flat fee Description
5. Supported Billable Time: limited access – only entered by a team leader
6. Unsupported Billable Time: limited access – only entered by a team leader

F. Description

Enter a full description of the ticket in this field. Description is mandatory.

To add description:
1. In an existing ticket
2. Click in description box and optional formatting with the format tool bar is available
G. Assignees

To assign a queue or team to the ticket:
1. In an existing ticket
2. Open and close users and teams using the + and – signs
   i. To view members of a Team, select the Team name. To assign the Team, select
   ii. Assign Team and click . The Team appears in the assignment box. To Remove select the arrow pointed in the opposite direction.
   iii. To assign a particular user, select the user's name and click . Only Queue managers should assign to individual users.
   iv. To assign another Team, click the Team name to shrink the list and select another Team.
3. The name(s) display on the right.
4. Multiple users or queues may be assigned.

To re-assign a queue or team to the ticket:
1. Login to Footprints
2. Select a ticket edit icon to open
3. Scroll to Assignees
4. In the Incident Management Project, users may remove their team or agents from the Assignee box with the arrow key to prevent old assignees from receiving escalation emails.
5. Add to new Assignees
6. Select to send the new assignee an email in the adjacent ‘Send Email to’ box
7. Select GO at screen bottom.
H. Send Email To

When a ticket is created, by default the agents assigned and the customer involved will receive an email notification when the ticket is created.

To add additional email notification:
1. In an existing ticket
2. Select the CC: field
3. In the CC Address pop up box, add additional email address from Footprint agents or customer address book.
4. Select email notification for all changes or just ticket creation.
4. Select GO.
I. Time Spent

Time spent is mandatory even when creating a ticket. If you have spent time working on a ticket, enter the amount of time spent.

To add time to a ticket:
1. In an existing ticket
2. Add hours and minutes as applicable. If this is a new ticket enter time it took to enter the ticket.

J. Attachments

Footprints allows adding attachments to tickets. This incident project's attachment directory has 40000 KB free.

To add an attachment:
1. In an existing ticket
2. Select Attach Files icon in the header
3. Select Browse, locate file, and select Open
4. Repeat step 3 if uploading more than one file. Maximum is 3 files at a time, each file no larger that 500KB.
5. DO NOT submit ticket until the upload window has successfully closed and the upload is complete.
6. Last file attached appears in attachments area.

K. Submit Ticket

Submit Ticket—When you are ready to submit the Ticket, click GO. If FootPrints detects a mandatory field blank a message is displayed.

Once you have successfully submitted the Ticket, FootPrints assigns it a Ticket number and displays your FootPrints Homepage. From there, you can select the new Ticket to view the Details or click to edit the Ticket.
SECTION 5
EDIT TICKETS

Agents may edit a ticket anytime up until the status equals the work completed status. At this point a ticket a ticket should not be edited and a new ticket created if the problem persists.

**Edit a ticket:**
1. Login to Footprints
2. Locate the ticket thru ‘My Assignments’ or Quick Search.
3. Select the edit icon beside the ticket number
4. The ticket opens and displays the following button bar. Some functionality has been restricted such as deleting tickets
5. **Make necessary edits. Once the problem is resolved change the status of the ticket to Work Completed.**
6. Select Go at screen bottom

Note: In the event that more than one team is assigned, when the first team completes their work, they can make a note in the description field, and if desired, unassign themselves from the ticket as long they are not the only assignee. When the second team completes their work and all of the work is deemed to be complete, that team can then set the status to Work Completed.

**Edit** – allows changes to the ticket as it is being worked on. Status, description, assignees and other values may be changed. Each time a change is made to a ticket agents must add a description.

**Copy/Move** - allows an agent to Copy in this Project, Cross-Project Copy, or Move to Another Project

**Link** - allows agents to link a ticket to another ticket statically or dynamically

**Subtask** – do not use

**Global** – do not use

**Delete** – Most agents can not delete unless it is a ticket they have originated

**History** – Is an audit trail for all actions applied to a ticket and is tracked by Footprints and can not be altered by a user

**Report** - allows agents to summarize a ticket in an new browser window – often used to print a ticket
**Add to KB** – allows team leaders to take ticket contents and convert to a knowledge base item

**Time Tracking** – provides time tracking information about a ticket
**SECTION 6**  
**PRINTING**

Before printing you must convert the tickets to a report – then print.

**To print ticket information:**
1. Login to FP
2. Display My Assignments or the assignments where the ticket is located.
3. Check mark tickets to print
4. From the drop menu select Report
5. Select the arrow icon to perform selected action
6. A new browser window opens
7. Select File, Print from the browser window

```
ASSIGNEES   LAST EDITED ON   STATUS   TITLE
-------------   ------------   -------   --------------
Applications   10/16/2007    Active   FP test - Team Leader notification - please...

4. From the drop menu select Report
```

```
WebCT is great

Ticket Number: 74
Priority: Medium
Status: Active
Submitted By: Laura Harperger
Assignees: Laura Harperger
Description

Submitted On: 09/22/2007
Submitted At: 13:20:43
Last Edited On: 10/16/2007
Last Edited At: 09:55:42
```
SECTION 7
SEARCHING

Quick Search and Advanced search is located in the top frame or side menu. Advanced search contains a combination of text fields, drop-down boxes, multi-select, and radio buttons that allow you to search on many criteria.

A. Quick Searching

To use quick search:
1. Select to search by Title, Keyword or Number
2. When searching for multiple numbers separate by a comma eg. 5,22,165
3. Click go arrow

B. Advanced Searching

To use advanced search:
1. Select Advanced
2. Enter criteria Example Status: Active and Customer ID
3. Select to save the search to reuse
4. Select Go arrow at page bottom

To access saved advanced search:
1. Saved searches are available thru the Project Home Display

Note: To search for nulls (i.e. nothing entered in the field) - use the value NODATA To search for not null (i.e. has anything been entered in the field) - use the value %
SECTION 8  
KNOWLEDGE BASE – TEAM LEADERS only

Searching the Knowledge Base:
1. Select Knowledge Base from side menu
2. Select Search
3. Enter the word or phrase for which to search – example problem type such as software.
4. Choose FootPrints Internal KB. However choices include: Microsoft TechNet, HP, Adobe, Google Groups, etc.
5. Click GO. A second browser window opens with the results of the search from the selected Knowledge Base.
6. If you are searching the Knowledge Base from an Issue page, you can copy and paste information from the external Knowledge Base into the Issue Description field if a matching Solution is found.

Team Leaders may add to the Knowledge Base and are responsible for keeping the items added current:
1. Select Knowledge Base from side menu
2. Select Add to KB
3. Select Add to Internal Knowledge Base.
4. Enter title: Titles should show the problem type* in the title.
   Example: Banner – Entering Requisitions
   Software – GroupWise spell check fix

CREATE SOLUTION
Add to Internal Knowledge Base

** Mandatory fields are highlighted and marked with an asterisk.

Title* Software · GroupWise Archive Instructions
SECTION 9
FLASHBOARD

The Flashboard feature displays up-to-the minute graphical reports of either a Project or personal activity and can be customized.

A  Personal Flashboard

To select your personal flashboard:
1. Select Flashboard from the side menu
2. Select Personal
3. A new browser window opens and providing live stats

B  Customize the Flashboard

To customize flashboard:
1. Select Flashboard
2. Select Personal
3. A new browser window opens and provides stats
4. Select the customize icon a page bottom
5. Select new information to display
6. Choose Apply this time only or save as default settings at page bottom
SECTION 10
REPORTS

Create custom reports with custom criteria and formatting options, including graphics and multi-level metrics. Agents may run saved reports. Team leaders may create, name and save with the Type: personal and shared (internal) for all Information Services to use.

A. CUSTOM REPORTS – TEAM LEADERS ONLY

To create a report:
1. Select Reports from the side menu
2. Select Custom
3. Step 1 - Select style: Columns, Wrapped, Metric/Graphic, Export, or Combo
4. Step 2-6 - Select the Criteria such as what fields to display, sort order, etc.
5. Step 7 – Select Report name and type: personal or shared (internal).

Note: To search for nulls (i.e. nothing entered in the field) - use the value NODATA
To search for not null (i.e. has anything been entered in the field) - use the value %

Note: It is important to note that under Date, Time, and Ticket range block, the Age criteria has a known FootPrints bug and results in accurate reporting. Please do not use this field.
**B. Saved Reports - Agents**

There are public reports that may be run by all FootPrints agents.

To run a saved public report:
1. Select Reports from the side menu
2. Select Saved
3. A list of Personal and Shared reports will display
4. Select the report
5. Select Run
6. Select Go

**C. Metrics Reports – Team Leader Only**

Metric reports return statistical data and metrics about the Project, rather than returning specific Issue data. Output options include HTML Text, Graphical, and Text File Export. The information returned by these reports can help you measure how well your organization performs and where improvement is needed.

These include:

1. Current Performance by Team/Agent
2. Issue Statistics
3. First Call Resolution
4. Resolution Rate
5. Received vs Closed reports
6. Turn-around Time
7. Service-level Agreements
8. Historical
9. Query Statistics

To create a personal metric report:
1. Select Reports from the side menu
2. Select Metric – Only Team leaders will have access to this area of FootPrints
3. Select the Report Type and Go
4. Select Report Output: HTML, Graphical, or Export
5. Optionally, save this report by providing a report name
6. Depending on Report type footprints will require more report options to be selected
SECTION 11
FOOTPRINTS ONLINE FORM

There is a web form for customers to fill in to enter a ticket online. Tickets submitted via the web are assigned to the ITSC for review, completion or re-assigning.

Note: Account Requests can not be entered using the web form and must be entered by area administrators in the Account Request Project within FootPrints

A. FootPrints Web Form Location

To access the FootPrints web form:
1. Open Internet Browser
2. Go to: http://www.uregina.ca/compserv/ITSC/fp.shtml

Note: Information Services agents should username@ uregina.ca in the Email Address field to avoid an error when submitting NOT first.last@uregina.ca

FootPrints Ticket Form

Please complete the form below to submit a FootPrints Ticket to the IT Support Centre.
Please – Do not use this form to request email accounts

* Required Information

Subject: Please select
ID number: 9 digit employee/student id
Last Name: 
First Name: 
Email Address: i.e. First.Last@uregina.ca
Faculty/Department:
Phone: 
Location: i.e. AH 106.1
Barcode number: i.e. EV00000 or A01000
Problem Type: Make a Selection
SECTION 12
WORKFLOW SUMMARY

Footprints Incident Management
Workflow Summary - Incident reported by phone

Start

User contacts ITSC by phone

ITSC receives call, enters ticket into Footprints

ITSC requests Footprint from user; performs validation of number (up to 2 times)

ITSC requests user department (for Footprint validation at invoice time)

ITSC able to resolve problem?

Yes

ITSC resolves problem and updates ticket

Team Leader receives email notification (ticket assigned to team)

Team Leader assigns ticket to a team member

Team member resolves problem

System updates ticket status to Closed *

End

No

ITSC evaluates problem and determines assignee, priority

Team Leader receives email notification (ticket assigned to team)

Team Leader assigns ticket to a team member

Team member resolves problem

Ticket assigned to Technical or Network queue?

Yes

System updates ticket status to Closed *

Re-assign to Mark or Terry

If ticket is subject to invoicing:
- set invoice field to Automatic or manual
- set status to To be invoiced

System sends notice to user upon ticket closure

Notes

* System sends notice to user upon ticket closure

Change ticket status to 'Work Completed'

Use Queue / Priority list to aid in determining assignee and priority

Use Customer search function in Footprints to review user details

Use Footprint search function to validate copy and paste Footprint number into Footprints fields

Select department from drop down list in Footprints

Use Queue / Priority list to aid in determining assignee and priority

Team Leaders for Network, Technical queue verify labour, parts, fix fee details

After review, Team Leader updates ticket status

Use Queue / Priority list to aid in determining assignee and priority

System updates ticket status to Closed *
Footprints Incident Management
Workflow Summary - Incident received via webform

Start

User submits ticket using the webform

ITSC staff member views ticket to ensure accuracy of Title, Priority, Status, Customer Info, Ticket Info, FOAPAL, and Billing Info.

Page 1

Footprints Fields, Functions and Other References

Background routine receives webform tickets, generates ticket number, sets ticket status to Pending.

Use Customer search function in Footprints to retrieve user details.
Footprints Incident Management Invoice Processes

Start

Invoice Generation process
- Invoice agent views tickets where:
  - status = To be Invoiced,
  - invoice = Automatic, Manual

Validate Foapal (using custom lookup function)

- Foapal valid?
  - Yes
    - Default Foapal maintenance
    - Designated administrator reports
    - Invoice team updates default number and/or department name
      - New or changed department name?
        - Yes
          - Export list to a file; email to ITSC
          - ITSC updates drop down list in Footprints
        - No
    - Invoice team updates default number and/or department name
  - No
    - Lookup default Foapal and update invoice record
    - Export invoices to Excel file
    - Upload data to Banner
    - Update ticket status to Closed
    - Send email to customer indicating invoice has been generated

End

Report of default Foapal usage (on request)
- Designated administrator runs a Caspar report (lists invoices where their default number was referenced)

Notes
- System sends notice to user upon ticket closure
SECTION 13
ACCOUNT REQUESTER PROJECT

Some agents are involved in the setup of Novell-Email, Novell Permissions, Training, Phones, Banner setup, and Requisition approval setup.

A. Edit Account Request Ticket

To edit an Account Request Ticket:

1. Login to Footprints
2. Locate the ticket thru ‘My Assignments’ or Quick Search.
3. Select the edit icon beside the ticket number
4. The ticket opens
5. View and read the ticket to determine scope of work
6. When work is completed go to Information Services Use Only – Task Status area. Checkbox your area showing task is complete

7. DO NOT REMOVE YOUR TEAM FROM THE ASSIGNEES BOX

8. Add a detailed description outlining the work

9. Select Go at screen bottom
B. Account Request Preferences

Once your areas work is complete on a ticket it will not disappear from the area’s queue until the entire ticket is complete by all assignees. Areas should NOT remove their team from the ticket when the work is complete. Instead, the following preference setting should be added.

To edit Account Requester preferences:
1. Login to FootPrints
2. Select My Preference for the side menu
3. Go to Homepage List Preferences, Homepage Columns,
4. Select Ticket Information
5. In the Available fields column find the name of your areas check box on the FootPrint ticket. Ex. ITSC Letter Sent or Phone Setup.
6. Select the add Field button.
7. In Apply Changes area, enter password
8. Select GO for the changes to be applied.
9. When viewing Account Requests you will be able to see if your portion is complete.
C. Account Request Responsibilities

**ITSC** - verifies and enters user id, checks ITSC complete box, types in description accordingly. The ticket will then be assigned to the appropriate teams according to the request.

**Email** - email is sent to wtsemail@uregina.ca to notify of a new ticket assigned to the email team, team member sets up email, checks Novell-Email Set Up box, then types in description accordingly.

**Banner** - once a ticket is assigned to the Banner team (an email notification is not sent), team member sets up Banner and/or Fast, checks Banner Set Up box, checks Fast Complete or NA box where applicable, then types in description accordingly.

**Phones** - once a ticket is assigned to the Phones team, email is sent to phones@uregina.ca, team member sets up phones, checks Phone set up box, then types in description accordingly.

**Network** - email is sent to netwadmin@uregina.ca to notify of a new ticket assigned to the Network team (after Email/Novell set up is completed), team member sets up network as per instructions in the Folder Permissions box, assigns Academic Research team if department server access is required, checks Novell Permissions box, then types in description accordingly.

**Training** - once a ticket is assigned to the Computer Training team (an email notification is not sent), team member sets up training, checks Training Scheduled box, then types in description accordingly.

**Finance Team** - email is sent to notify, a new ticket assigned to the Finance team, team member completes request, checks off Requisition Approval Set Up box, then types in description accordingly. Please note that Finance will also get an email notification when APEA and/or Research account is requested, but they are not required to complete anything in Footprints for this request. Jennifer will complete the steps for Finance team.

**HR Team** - email is sent to notify of a new ticket that has requested EPAF and HR is not required to complete anything in Footprints.

**Academic Research Team** - Network will assign ticket to Academic Research team when required, team member sets up required access, checks Dept Server Set Up box, and types in description accordingly.

**ITSC** - once the following check boxes are set to complete: Phone Setup, Novell Permissions, Banner Setup, Training Scheduled, Novell-Email Setup, Requisition Approval Setup, and Fast Complete or NA then ITSC will be notified by email sent to footprints.admin@uregina.ca, this team will contact user and send letter for new accounts, check ITSC Letter Sent or NA, then type in description accordingly.