

Module 3- Lists, Reports, and Preferences

OBJECTIVE: The objective of this module is to discuss the various lists, reports, and preferences available to users of the ASR system.

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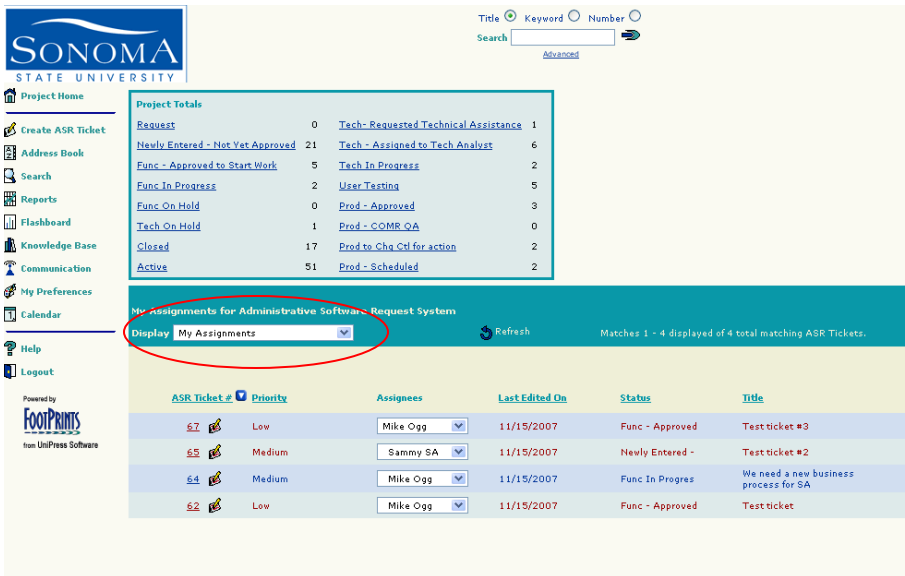
NEED ADDITIONAL INFORMATION?

For further questions on this process please contact Ken Beck at 4-3243 or at beckken@sonoma.edu

This documentation may be found online at www.sonoma.edu/cms/asr

Chapter 1: ASR Lists

Introduction: Lists are used in the ASR to visually group together tickets that have similar attributes. The drop down menu featuring the available lists can be found on the lower half of the homepage.




Selecting the List to Display: The Display drop-down menu will detail ticket lists available to view. The primary view most users need is My Assignments. It will detail all of the tickets currently assigned to user logged in. While there are other choices in the Display drop-down, most will not be needed by the standard user.



Finding a Specific Ticket not listed: The ASR search feature will help to find a ticket that doesn't appear in a pre-populated list. By typing keywords, ticket numbers, or ticket titles, searches can be run to find a specific ticket.

Title
 Keyword
 Number

Search 

[Advanced](#)

If none of the above information is available, clicking on the **Advanced** button will open additional search options.

Search Administrative Software Request System

New Search

Title	<input type="text"/>	Keyword (any field)	<input type="text"/>
Description/Note	<input type="text"/>	Attachment filename	<input type="text"/>
Assigned to	<input type="button" value="Not Assigned"/> <input type="button" value="AIS Change Control"/> <input type="button" value="AIS Management Tool"/> <input type="button" value="AIS Team"/> <input type="button" value="FIS Team"/> Advanced Assignment Controls	Submitted by	<input type="button" value="Ken Beck Project Admin"/> <input type="button" value="Leo Aloullar"/> <input type="button" value="Vaughn Ballwood"/> <input type="button" value="Susan Bennett"/> <input type="button" value="Charlie Changecontrol"/>
Priority	<input type="button" value="Low"/> <input type="button" value="Medium"/> <input type="button" value="High"/> <input type="button" value="Urgent"/>	Status	<input type="button" value="Open/New"/> <input type="button" value="Newly Entered - Not Yet Approved"/> <input type="button" value="Approved for Functional Work"/> <input type="button" value="Func - Approved to Start Work"/> <input type="button" value="Func In Progress"/>

ASR Ticket Types to Include:

Select all ASR Ticket Types
 Regular ASR Tickets
 [Ignore ASR Tickets/Subtasks Relationship](#)
 Include Master ASR Tickets
 Include Subtasks

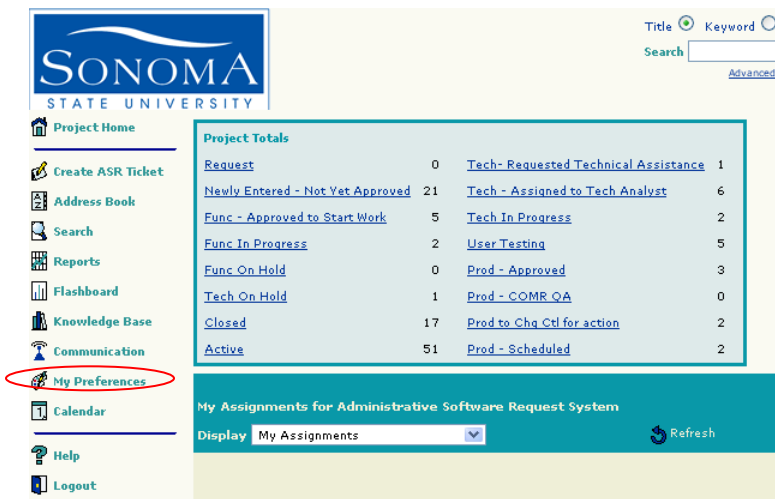
Date: on current date (and) current date
 during the previous:
 Select Range

Age: DAYS and HOURS old
 Include Only ASR Ticket Numbers through

Chapter 2: User Preferences

Introduction: The ASR has the ability to be fully customizable to the user and their preferences. The next chapter will provide the detail of how to access those customizable options and how they can be changed.

Getting to My Preferences: In order to get to the preferences screen you must click on the **My Preferences** button on the left hand column of the homepage. From here you will be able to control all of the customizable fields.



The screenshot shows the ASR system homepage. On the left is a navigation menu with the following items: Project Home, Create ASR Ticket, Address Book, Search, Reports, Flashboard, Knowledge Base, Communication, **My Preferences** (circled in red), Calendar, Help, and Logout. The main content area features a search bar at the top right with radio buttons for 'Title' and 'Keyword', and a search input field. Below the search bar is a 'Project Totals' table:

Project Totals			
Request	0	Tech - Requested Technical Assistance	1
Newly Entered - Not Yet Approved	21	Tech - Assigned to Tech Analyst	6
Func - Approved to Start Work	5	Tech In Progress	2
Func In Progress	2	User Testing	5
Func On Hold	0	Prod - Approved	3
Tech On Hold	1	Prod - COMR QA	0
Closed	17	Prod to Chg Ctl for action	2
Active	51	Prod - Scheduled	2

Below the table is a section titled 'My Assignments for Administrative Software Request System'. It includes a 'Display' dropdown menu set to 'My Assignments' and a 'Refresh' button.

Setting My Preferences: By clicking on the **My Preferences** button, users are taken to the screen where they are able to set their preferences. The customizable options are broken down into 6 categories. They can either be selected from one of the hyperlinks or viewed as a list.

My Preferences

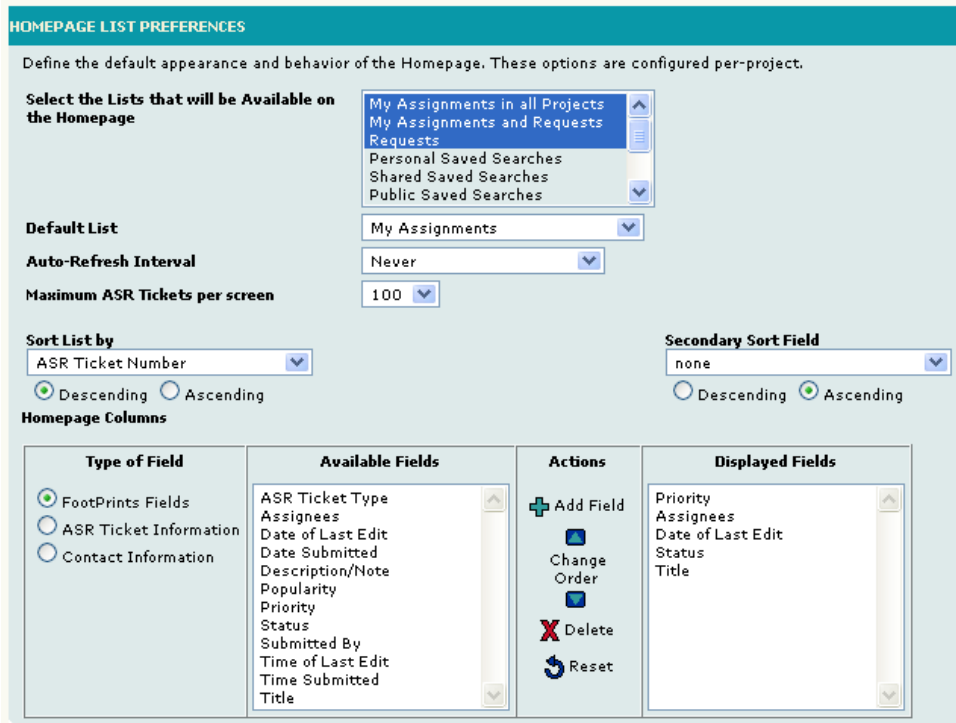
General	ASR Tickets
Homepage List	Security
Appearance	Misc.

General Options: General Options consist mostly of contact and personal information options. Users can specify a contact email address for not only their computer, but also pager and/or wireless device. Since the password and login is the same as their LDAP login, the user cannot make changes to their password from the General Options field. In addition user with access to both ASR and the IT Helpdesk can select the project they would like to be visible upon login from the Default Project drop-down box.

NOTE: In order to have emails sent to additional addresses make sure the “Send notification emails to this address” box is checked.

GENERAL	
Name	<input type="text"/>
Primary Email Address	<input type="text"/> <input checked="" type="checkbox"/> Send notification emails to this address
Pager Email Address	<input type="text"/> <input type="checkbox"/> Send notification emails to this address
Wireless Email Address	<input type="text"/> <input type="checkbox"/> Send notification emails to this address
Change Password	This FootPrints system uses LDAP password authentication. For security reasons, your password cannot be changed within FootPrints itself.
Default Project	Administrative Software Request System <input type="button" value="v"/>

Homepage List Preferences: The Homepage List preferences allow you to set what you would like to see on your homepage when you first open the ASR. See the table below for the definition of each field.



Selection	Definition
Select the Lists that will be Available on the Homepage	Selects the ticket lists viewable from the homepage.
Default List	The ticket list that is automatically displayed when you log in.
Auto-Refresh Interval	How often the screen will refresh or look for new information.
Maximum ASR Tickets per screen	The maximum number of tickets that can be viewed on one screen.
Sort list by	The way the tickets on any of the lists are primarily sorted. Defaults to ASR ticket number.
Secondary Sort Field	The secondary way tickets are sorted after the primary sort list by is selected. i.e. - ASR ticket number, then email address.

Selection	Definition
Type of Field	The list of different categories of Available Fields.
Available Fields	The various fields available to view in the Homepage lists.
Actions	Gives options to add, delete, reorder, or reset fields from the displayed field list.
Displayed Field	The fields displayed on the Homepage lists.

Appearance Preferences: Appearance preferences are those which impact some of the basic appearance of the ASR. For example the clock, default language, text size, etc... With the exception of the text size, most of the Appearance Preferences should be left in their default values.

APPEARANCE

Your Local Time Zone (GMT-8:00) Pacific Time(US & Canada); Tijuana

Date Format American - MM/DD/YYYY

Preferred Language Use Default


Toolbar Mode Automatic (Browser Detect)

Font Size Change Size Sample Text

Project Totals/Globals Show Hide

ASR Ticket Preferences: ASR Ticket preferences are those which allow users to enable or disable features when actually reading or submitting a ticket. In addition auto notes, descriptions, and signatures can be created. See table below for further information about each category.

ASR TICKETS

Multiple Windows	<input type="radio"/> Enable <input checked="" type="radio"/> Disable
Automatic Spell Check	<input type="radio"/> Enable <input checked="" type="radio"/> Disable
HTML Description/Note Editor	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
Display Complete Description/Note on Edit	<input type="radio"/> Enable <input checked="" type="radio"/> Disable
Prefill New ASR Tickets With My Contact Information	<input type="radio"/> Enable <input checked="" type="radio"/> Disable
Open attachments from a new window	<input type="radio"/> Enable <input checked="" type="radio"/> Disable
Quick Description/Notes/Signatures	 Configure Quick Description/Notes/Signatures

Selection	Definition
Multiple Windows	Issues created or edited are opened in new windows, enabling the user to work on multiple issues at one time. NOTE: The Pop-Up Blocker must be turned off to have this feature work.
Automatic Spell Check	Enables the spell check feature in any text input field.
HTML Description/Note Editor	Allows formatting in the description box. Should always be enabled.
Display Complete Description/Note on Edit	Allows users to view previously entered notes/descriptions without opening a View Current Description window.
Prefill New ASR Tickets with My Contact Information	Enters contact information into the ticket automatically. Leave disabled to avoid receiving duplicate communications.
Open attachments from a new window	Allows browser to start another window to view any attached files. NOTE: The Pop-Up Blocker must be turned off to have this feature work.
Quick Description/Notes/Signatures	Allows the user to create standard description, notes, and signatures for use in text entry boxes.

Security Preferences: The security selection allows the user to select whether a password should be required to submit a ticket in the ASR. This should always stay as **Don't Require**.

SECURITY

Require Password for ASR Tickets Don't Require Require **NOTE:** This option must be configured per-project

MISC.: Miscellaneous preferences allow the user to set 508 compliance, Instant Talk, and Checkback options. These should always remain in their defaulted values.

MISC.

Instant Talk Allow Customers to Talk to me Don't allow Customers to Talk to me

U.S. Government Section 508 Compliance/Visually Impaired Enhancement Enable
If enabled, FootPrints is optimized to be used with "JAWS" and other text-to-speech browsers

"Checkback" Method Java Applet JavaScript JavaScript/HTTP

Apply Changes: In order for any of the preference changes to be submitted, the user's password must be entered correctly at the bottom of the preferences menu. Once entered click **Go** to submit.

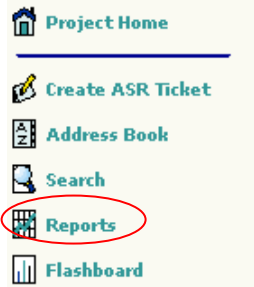
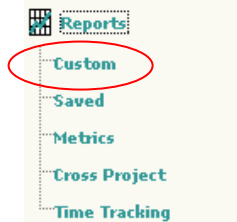

APPLY CHANGES

Password: 

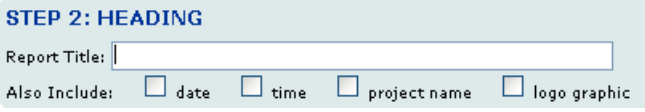
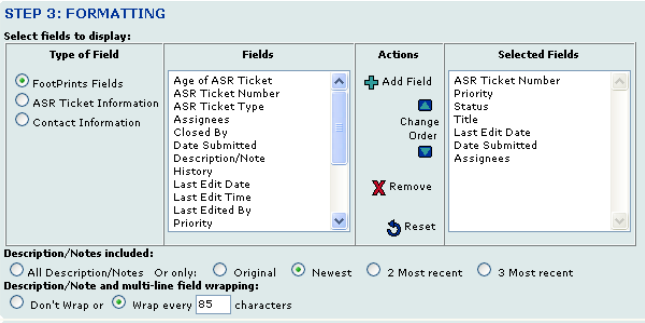

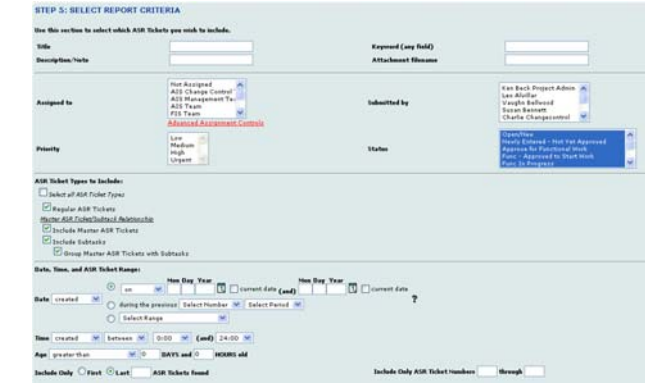
Chapter 3: Reports

Introduction: One of the advantages to using the ASR is its reporting capabilities. It allows for simple custom report creation. This chapter will walk through how to create custom reports so that they provide the needed information.

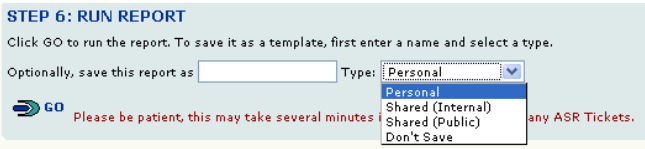
Custom Reports: The ASR gives users the capability to create their own custom reports. The table below outlines the steps necessary to create a custom report.

Step	Action	Screenshot
1	Click on the Reports button on the ASR homepage.	
2	Click on the Custom button under Reports.	
3	Select the radio button for your preferred style and click the Go button.	

Continued on the next page...

4	Enter a Report Title and check the boxes for additional information to be included.	
5	Select the Fields to be included in the report. By default ASR Ticket Number, Priority, Status, Title, Last Edit Date, Date Submitted, and Assignees are automatically included. Fields will vary by Type of Field selected. Add a field by clicking on the Add Field button. Remove fields by clicking on the Remove button. Changing the order of the selected fields will only affect the way they are displayed.	
6	Select a sort order for the report using the fields listed in the Field drop down box. The fields listed are dependant on the fields selected in step 5 (Step 3: Formatting)	
7	<p>Select the ASR ticket criteria from the multiple options listed. There is no limit to the amount of criteria available for a report.</p> <p>NOTE: When no values are selected for a choice/drop-down field, there will be no search on that field.</p>	

Continued on the next page...

<p>8</p>	<p>Chose if and how you would like to save the report. The table below will define the options for saving a report.</p> <table border="1" data-bbox="300 541 771 1024"> <thead> <tr> <th>Save Type</th> <th>Definition</th> </tr> </thead> <tbody> <tr> <td>Personal</td> <td>Saves only for the person generating the report.</td> </tr> <tr> <td>Shared (Internal)</td> <td>Is viewable to anyone using ASR for SSU.</td> </tr> <tr> <td>Shared (Public)</td> <td>Not enabled for use.</td> </tr> <tr> <td>Don't Save</td> <td>Doesn't save a copy of the report.</td> </tr> </tbody> </table>	Save Type	Definition	Personal	Saves only for the person generating the report.	Shared (Internal)	Is viewable to anyone using ASR for SSU.	Shared (Public)	Not enabled for use.	Don't Save	Doesn't save a copy of the report.	
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Personal	Saves only for the person generating the report.											
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Shared (Public)	Not enabled for use.											
Don't Save	Doesn't save a copy of the report.											
<p>9</p>	<p>Click on the Go button to run the report. Based on the amount of data and criteria it may take a few minutes to generate.</p>	