Office of the Vice President for Research
Research Administration Services

OSP Service Tracker (OST) *Guidelines for DLC Users*

OST is a web-based tool for DLC Administrative staff to request and track post-award services from Research Administration Services for Awards and Institute Proposals in Kuali Coeus.

Note: the following award activities have separate request mechanisms and should **not be submitted via OST:**

- Requests for new subaward (Subaward requisition process)
- Requests for invoices (should go to VPF)
- Revised budgets (routed as proposals in KC)

Authorizations

The DLC **Financial Primary Authorizer** assigns OST roles for administrative staff in the MIT Roles Database. There are two Department roles:

- **OST DEPT SPECIFIC ADMIN KC** → Authorizations for assigned unit only.
- **OST DEPT ADMIN KC** → Authorization at the assigned unit and all the units below it.

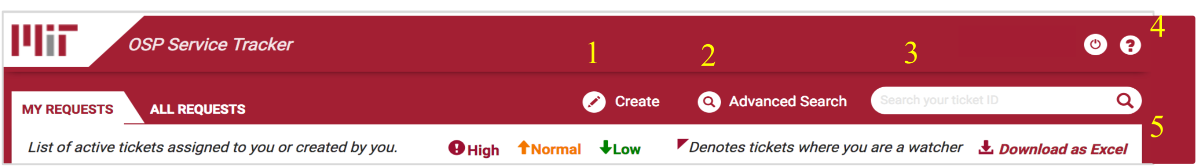
Note: depending on how your DLC chooses to set up roles, information submitted in OST may be viewable by all of the OST Administrators in your DLC. In that situation, confidential information should not be included in an OST request and, if necessary, may be sent by separate email.

Access OST via the web

Connect to the OSP Service Tracker via: https://ost.mit.edu
**OST uses Touchstone to authenticate users. Internet Explorer is not a supported web-browser for OST.*

OST Dashboard

When you access OST, the **OST Dashboard** displays allowing you to create requests, view active requests, and search for resolved requests.



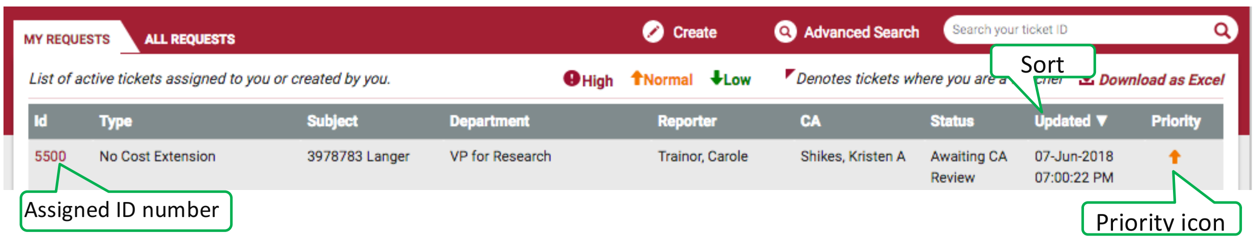
1. **Create**: click to create a new service request
2. **Advance Search**: search Active and Resolved tickets by status, award number, request type, etc. Narrow your search by using multiple fields. Use the asterisk wildcard * to search when entering incomplete data.
3. **Quick Search** (Search your tickets by ID): enter assigned ID number for a request that you created or are an assigned Watcher.
4. **Logoff** and **OST Help:** Click ⏻ to logout/login. Click **?** to access OST Help.
5. **Download as Excel:** download spreadsheet of requests as displayed in Dashboard or search results.

OST Dashboard has two tabs:

My Requests lists all active requests you created or have been assigned as Watcher. Once a request is resolved, it no longer displays (you may search by Id number or Advanced Search).

All Requests lists all active service requests in the units where you have OST authorization.

- By default, lists are sorted by **Updated** (date and time) with the most recent items listed first.
- Re-sort the list by clicking other column headings, i.e. *Type*, *Status*, *Priority* etc.
- **Status** provides additional detail when at RAS (*At DLC* indicates you are assigned next action)
- Priority icon indicates **High**, **Normal** or **Low** priority for each request in the dashboard.
- Click anywhere on the request to open Details.



- **Id** – Number assigned to saved or submitted request. Click to view or edit request.
- **Type** – Award activity that was selected for the request.
- **Subject** – Free text field with details added by Reporter.
- **Department** – Unit name for request.
- **CA** – Contract Administrator assigned to request based on Department.
- **Status** – request processing details and/or assignment, including:

  DLC-Not Submitted – Draft saved but not submitted.

  Awaiting CA Review – Request has been submitted and email notification sent to Contract Administrator listed, request appears in CA OST Dashboard.

  At RAS-Processing – RAS Contract Administrator reviewed the request and assigned it to his/her self or other RAS staff member for processing. For example, the CA may assign the request to an Assistant Contract Administrator (ACA) or other RAS staff for processing. View request details to see the name of the person assigned the ticket.

  Assigned to POPS – RAS Contract Administrator reviewed the request and assigned it to the POPS (Post-Award Operations) team for processing.

  At DLC – You (DLC) are assigned to take action on request. Click to open and view request details for information on requested action for processing.

  Awaiting RAS Verification – Request has been completed by assigned RAS/POPS. The Contract Administrator will review the request and mark *Resolved*. Note: Resolved requests do not appear in the dashboard (you will get a notification with a link to the request).

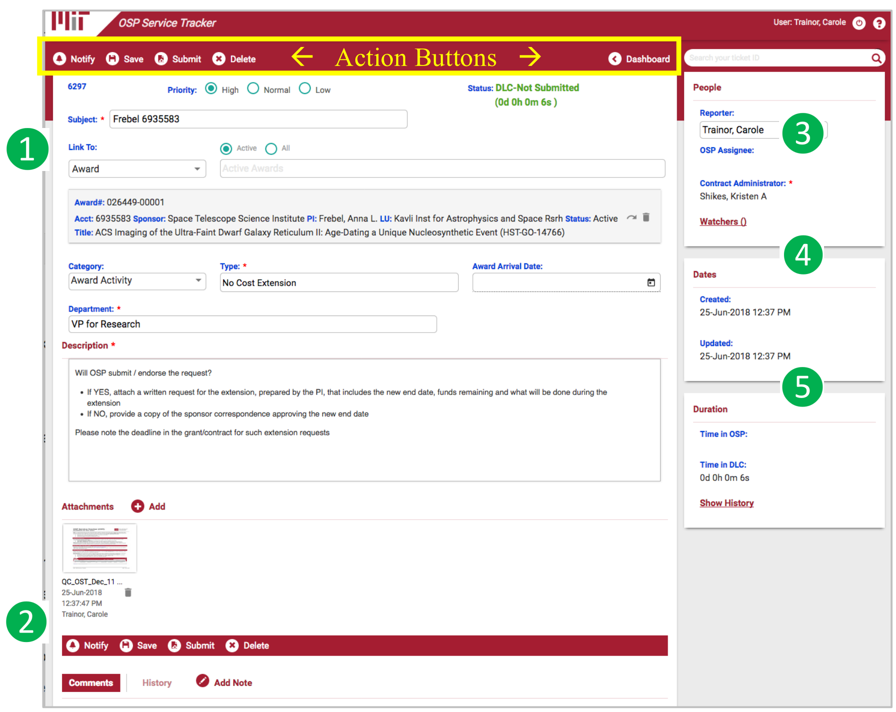
- **Updated** – Date and time when request was last updated (default sort displays most recently updated requests at the top of the dashboard list).
- **Priority** – Color icon indicates priority, **high**, **normal**, **low**, for each request in the dashboard

View / Edit Service Request Details

Access details by clicking on the request in the Dashboard or the link provided in an OST email notification. The Details screen displays request data and provides options for further actions.
Action Buttons appear in the red bars above and below the main section of the screen. Actions available to Department Administrators:

- **Notify**: Enter names of *Recipients* who will receive email notification with a link to view the request (recipients must have a valid MIT certificate to access the system). *Message* text entered is not incorporated into the request history but the person's name will display as a Watcher.
- **Reopen** [Resolved requests only]: Reopen a request for additional work, making it active, returning it to the list of open items under "MY REQUESTS" with the status *Awaiting CA Review*.
- **Save** [draft or edited requests only]: When first used, creates a draft request with assigned Id and Status "DLC-Not Submitted". During editing, saves changes made.
- **Submit** [draft or "At DLC" requests only]**:** Submit to the RAS Contract Administrator for review, assignment and processing.
- **Delete** [draft requests only]: Permanently delete draft/unsubmitted request (will not display in *My Requests*).
- **Edit:** Use to make changes to the general fields of the request (not necessary for adding comments or uploading attachments).
- **Dashboard** – exit request and return to the Dashboard. A pop-up window will prompt you to save changes if needed.

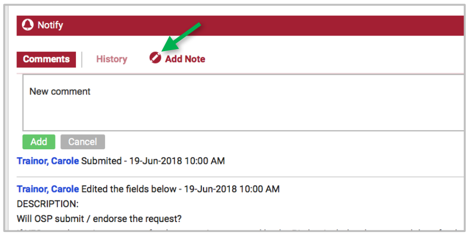
Details screen is divided into two sections: **Main Data** (1 & 2) and **Info-boxes** (3, 4, & 5) on the right.



1. **General** - Displays request ID #, Priority, Status, Subject, Award/IP Details, Category, Type, Department, Description and Attachments.
    - **Status:** Indicates stage in processing and who is assigned to take the next action on the request. When a request is submitted, the initial status is "*Awaiting CA Review*". Length of time the request has been in that State displays in parenthesis.
    - **Attachments:** Thumbnail of attachments allows preview. Click the **+ Add** icon to upload attachments at any time.

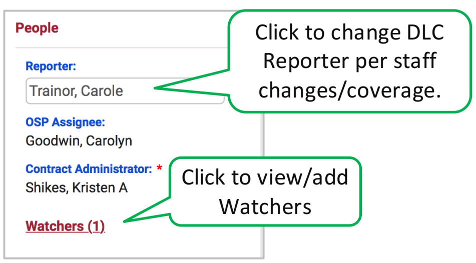
2. **Comments/History** – Once the request is Saved, the Comments/History displays actions and notes entered on the request in chronological order with the username and timestamp related to each action.

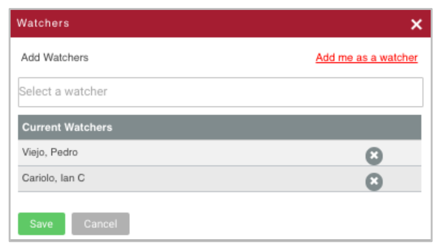
- **Comments**: click the **Add Note** icon and a textbox will display. Enter text and click the **Add** button. A notification with comments will be sent to the assigned RAS Administrator and Watchers without changing the status of the request.



- **History**: view actions that have been taken (without comments).

3. **People**: Displays *Reporter* (creator of the request), current *RAS Assignee* (RAS staff currently working on request), *Contract Administrator* (RAS CA) and *Watchers* (number in parenthesis). Click **Watchers** to view *current watchers* or Add Watchers (type Kerberos or last name in textbox). A Watcher is not required to take action but will receive notifications and may add Comments. Watchers can remove themselves from the Watcher list.

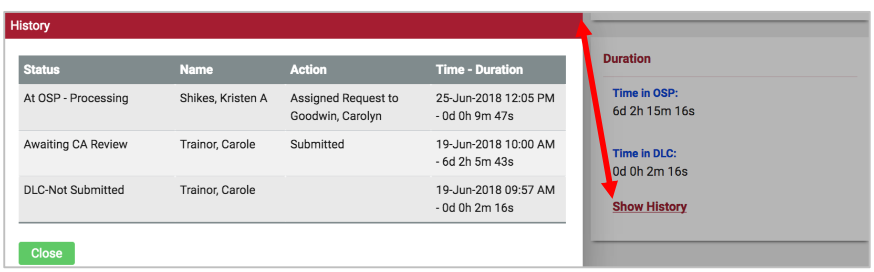




4. **Dates**: Displays the timestamps for date *Created* and the date the request was last *Updated*.

5. **Duration**: Displays the aggregated *Total time in RAS* status and *Total time in DLC* status.

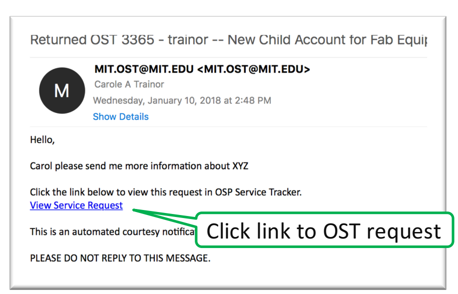
The *Show history* link displays a list of the status, the user that took the action, the action taken that changed the status and the time that the request stayed in that particular status.



Email Notifications

Actions taken in OST (submit, assign, add attachments, add notes, resolve, re-open, etc.) generate notifications to the individuals listed in the request and its Watchers.

Email notifications provide a brief description of the action taken and a link to open request details. These emails provide a way to inform you of progress on your requests without forcing you to be logged into the OST system.

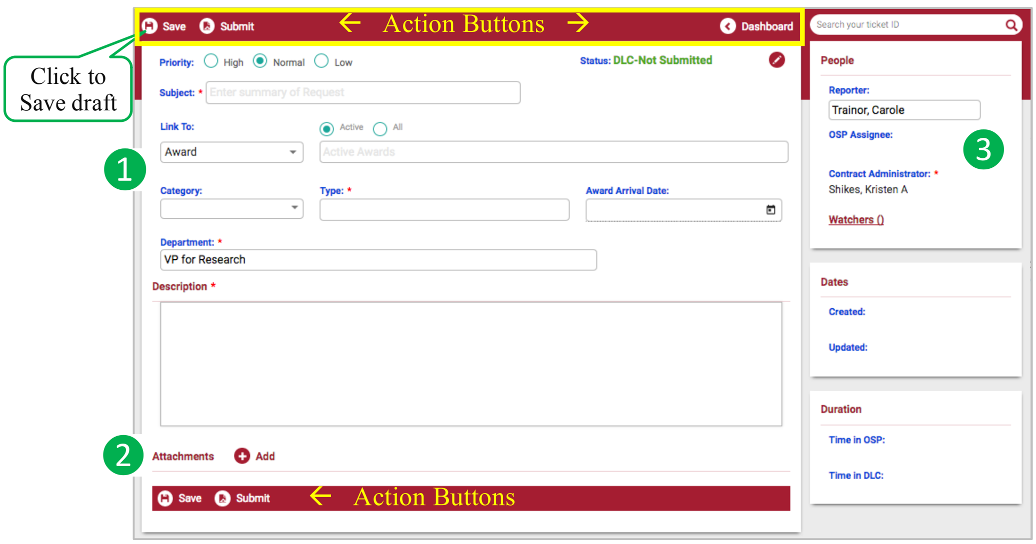


Create a Service Request

1. Click the **Create** button on the dashboard to begin a new service request.

A new request screen will display. **Action Buttons** appear in the red bars above and below the main section of the screen. Actions available to Department Administrators:

- **Save** – Save changes while creating/editing a request. To save a draft, click **Save** then click the **Dashboard** button to exit the request. The saved request will display in My Requests with the *DLC-Not Submitted* status. Later you can open, edit and submit.
- **Submit** – Click to submit to the RAS Contract Administrator for review, assignment and processing.
- **Dashboard** – Exit request and return to the Dashboard. A pop-up window will prompt you to save changes if needed.



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1 Create Request Main screen

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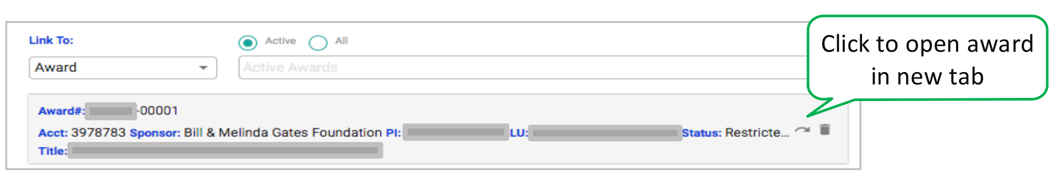
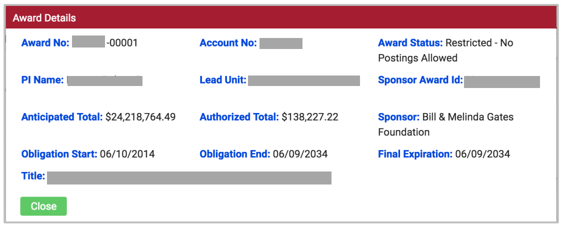
2. Required fields are marked with a red asterisk*.

   - **Priority** – Defaults to *Normal*. Use radio buttons to select **High**, **Normal**, or **Low** request priority. Color icon will display in Dashboard and text will appear in notification email.
   - **Status** [display only] – begins as *DLC-Not Submitted* until request is submitted.
   - **Subject*** – Enter a subject that will be useful to you when viewing requests in the Dashboard (may want to use the Account number, PI or other helpful descriptor).
   - **Link to** – Select **Award** or **Institute Proposal** from the pull-down menu. To search for an Award, select *Active* (default) or *All* radio button. Enter Award/IP data (i.e., Award or IP number, Account, PI, Award Title, Department Name/Number, then select from the displayed options (do not use * wildcard).

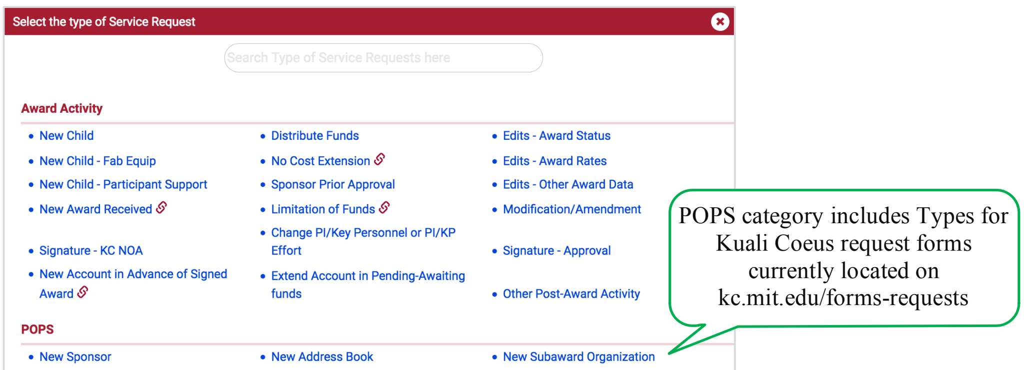
     Once selected, click the curved arrow to open the Award/IP in a new tab or click the trash icon to delete.



Once the Award or Institute Proposal is linked, you can click on Award/IP to view additional details, including Anticipated Total, Authorized Total, Obligated Start, Obligated End, and Final Expiration.



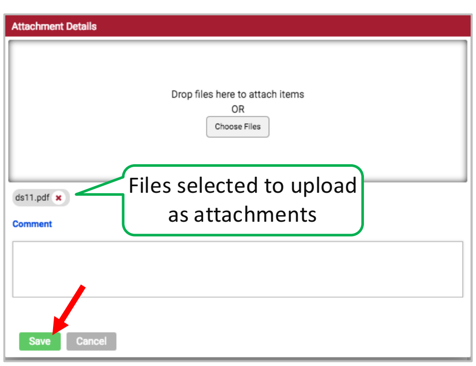
- **Category** – (optional) select *Award Activity* or *POPS* from the pull-down list to narrow the *Type* list. Leave as *Please Select* to view the complete list of Types.
- **Type*** – click to select from the pop-up list. Be sure to select the correct *Type* as requirements in the Description will be based on your selection. Click on the link icon to open related RAS documentation in another tab/window.

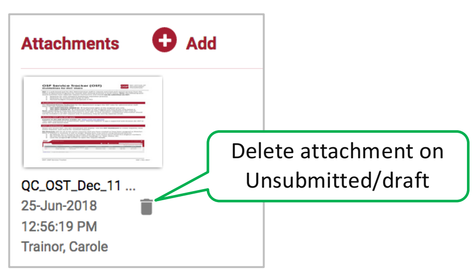


- **Award Arrival Date** [display only] – Used by RAS only for *Signature – KC NOA*.
- **Department*** – Defaults to your home unit but allows you to select other departments where you have an OST admin role.
- **Description*** – Based on selected Type, the Description will list required information that you must provide to complete your request. Enter requested data and any additional information that you would like to include. There is no validation on info entered.

2 Attachments

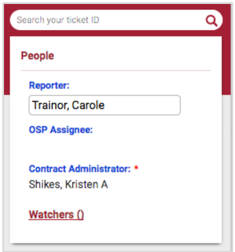
- **Attachments** – Click **+ Add** to select and upload an attachment. In the Attachment Details pop-up window, click Choose Files and select the file(s) to upload. Add text to the Comment field as wanted. Click the **Save** button and the uploaded attachments and request will be saved. Please note that taking any action in OST allows you to simultaneously add attachments and comments.



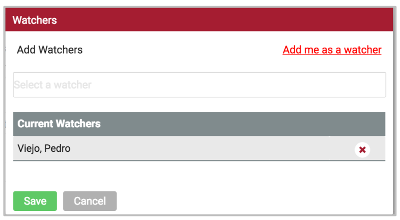


Uploaded attachments display as thumbnails for preview in the main screen

3 People Info panel



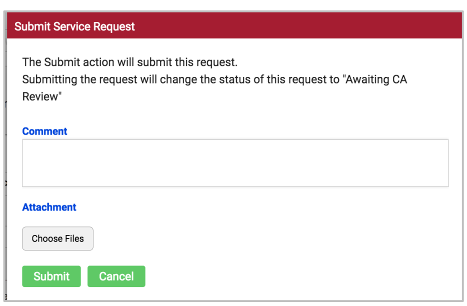
- **Reporter** – DLC administrator creating and tracking request. This field can be edited by the administrator.
- **RAS Assignee** [display only] – Blank until RAS Contract Administrator assigns to self or other RAS staff.
- **Contract Administrator** [display only] – RAS Contract Administrator for the selected Department.
- **Watchers()** - Click to add or view current watchers (type Kerberos or last name in textbox, select, then click **Save**). A Watcher is not required to take action but will receive notifications and may add Comments. Watchers can remove themselves from the Watcher list.



Save / Submit

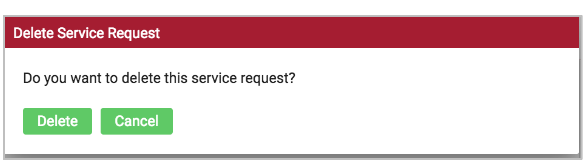
3. To save a draft for completion later, click the **Save** button in the upper left of the screen (click Dashboard to "close" the request).

4. Click the **Submit** button to complete the request. A pop-up window will prompt you to confirm the you want to submit the request. Click **Submit** (you may also upload an attachment and comment).



A green Pop-up window will indicate that the request was successfully submitted. The system will automatically send a notification to the RAS Assignee.

Note: If you decide not to submit the draft request for processing, click the **Delete** button to permanently delete the service request. You will be prompted to confirm deleting the Service Request.



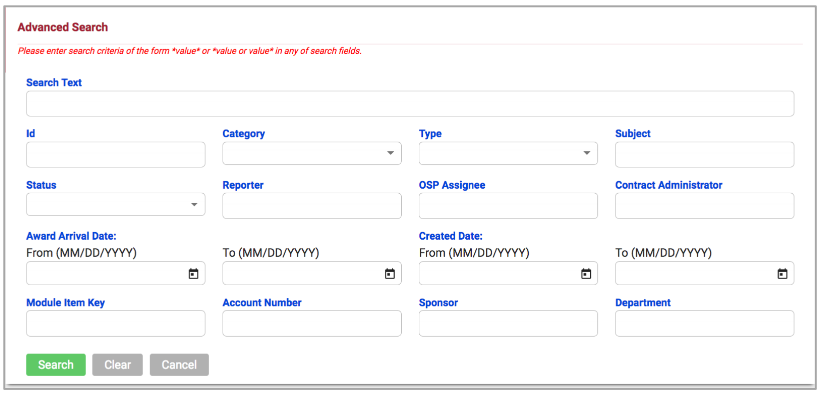
Advanced Search

Advanced Search allows searching of active and resolved requests based on a number of criteria, including Type, Status, Reporter, Date ranges, RAS Assignee, and Account Number. You may search by multiple fields to narrow or expand your results.

Note: Use the asterisk * as the wild card when searching.

1. Click the **Advanced Search** button on the dashboard.

The **Advanced Search** screen will display with the following search fields:



- **Search Text –** Enter specific terms you want to search for in the request Description or Comments, use the asterisk * as wildcard.
- **Id** – Enter request Id, use asterisk * as wildcard to enter incomplete number.
- **Category –** Select *Award activity* or *POPS* to limit search to Types within selected category.
- **Type** – Click checkbox for one or more *Type* to search for requests matching any of the selected
- **Subject** – Enter terms used in the open text Subject field, use the asterisk * as wildcard.
- **Status –** Click checkbox for one or more *Status* to search for requests matching any of the selected
- **Reporter –** Enter *last name, first name* of person, use the asterisk * as wildcard.
- **RAS Assignee –** Enter *last name, first name* of person, use the asterisk * as wildcard.
- **Contract Administrator –** Enter *last name, first name* of person, use the asterisk * as wildcard.
- **Award Arrival Date [to and from] –** Dates entered by RAS when sending NOA for signature
- **Created Date [to and from] –** Enter date range for when OST request(s) were created
- **Module Item Key –** Enter *Award* or *Institute Proposal* number, use the asterisk * as wildcard.
- **Account Number –** Enter account number, use the asterisk * as wildcard.
- **Sponsor –** Enter sponsor name**,** use asterisk * as wildcard
- **Department** – Enter department name, use asterisk * as wildcard.

Help / Feedback

For questions or problems using OST, email ra-help@mit.edu. Please include your Name and Contact Information in your email.

Please use the "**Send Feedback**" link at the bottom of the OST screen to send suggestions for enhancements.