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 \rightarrow Authorizations for assigned unit only.
- OST DEPT ADMIN KC \rightarrow 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.

OSP Service Tracker	1	2	3	© P ⁴
MY REQUESTS ALL REQUESTS	💉 Create	Q Advanced Search	Search your ticket ID	٩
List of active tickets assigned to you or created by you.	Generation Generati	Denotes tickets where you	are a watcher 🛛 🕹	Download as Excel

- 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.

MY REQUE	STS ALL REQUESTS				🧭 Create	Q Advanced Search	Search your	ticket ID	Q
List of a	ctive tickets assigned to you or	created by you.		9 High	↑ Normal ↓ Low	Denotes tickets wh	ere you are a	Sort Dow	mload as Excel
Id	Туре	Subject	Department		Reporter	CA	Status	Updated V	Priority
5500	No Cost Extension	3978783 Langer	VP for Research		Trainor, Carole	Shikes, Kristen A	Awaiting CA Review	07-Jun-2018 07:00:22 PM	+
Assign	ed ID number							Prie	oritv icon

- 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

BHigh
 ↑Normal
 ↓Low

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.

Notify 🕒 Save	🔊 Submit	🗴 Delete 🦂	- Actior	h Buttons \rightarrow	🔇 Da	ashboard Search your ticket ID	
6297		● High 🔿 Normal 🤇		Status: DLC-Not Su	ubmitted	People	
Subject: * Frebel 6	935583			(0d 0h 0m 6	6s)	Reporter:	
						Trainor, Carole	(3)
Link To:		Active All				OSP Assignee:	
Award	-					Contract Administrator	n.•
Award#: 026449-00	1001					Shikes, Kristen A	
				avli Inst for Astrophysics and Space Nucleosynthetic Event (HST-GO-14)		Watchers ()	
							Δ
Category: Award Activity	•	Type: * No Cost Extension		Award Arrival Date:		Dates	U
		No Cost Extension				Created:	
Department: * VP for Research						25-Jun-2018 12:37 P	м
Description *						Updated:	
						25-Jun-2018 12:37 P	M
Will OSP submit / en							G
extension		the extension, prepared by or correspondence approvin		end date, funds remaining and what will I	be done during the	Duration	J
		contract for such extension r				Time in OSP:	
						Time in DLC: 0d 0h 0m 6s	
_							
Attachments 🕀	Add					Show History	
Manufacture em							
H							
QC_OST_Dec_11							
25-Jun-2018 🖀							
Trainor, Carole							
Trainor, Carole	ve 🔕 Subm	nit 🛞 Delete					

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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.



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.

Comments Hist	Dry Add Note	
New comment		
Add Cancel		
	d - 19-Jun-2018 10:00 AM	
Trainor, Carole Submite	d - 19-Jun-2018 10:00 AM 16 fields below - 19-Jun-2018 10:00 AM	

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

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.

People	Click to change DLC	Watchers	×
Reporter:	Reporter per staff	Add Watchers	Add me as a watcher
Trainor, Carole	changes/coverage.	Select a watcher	
OSP Assignee: Goodwin, Carolyn		Current Watchers Vielo, Pedro	0
Contract Administrator: * Click	to view/add	Cariolo, Ian C	0
	Vatchers	Save Cancel	

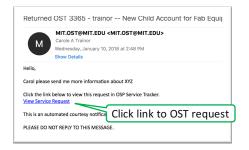
Dates: Displays the timestamps for date *Created* and the date the request was last *Updated*.
 Duration: Displays the aggregated *Total time in RAS* status and *Total time in DLC* status.
 The *Show history* link displays a list of the status, the user that took the action, the action taken that changed the status and the time that the request stayed in that particular status.

Status	Name	Action	Time - Duration
At OSP - Processing	Shikes, Kristen A	Assigned Request to Goodwin, Carolyn	25-Jun-2018 12:05 PM - 0d 0h 9m 47s
Awaiting CA Review	Trainor, Carole	Submitted	19-Jun-2018 10:00 AM - 6d 2h 5m 43s
DLC-Not Submitted	Trainor, Carole		19-Jun-2018 09:57 AM - 0d 0h 2m 16s

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.

MY REQUESTS ALL REQUESTS Create Q Advanced Search Search your ticket ID

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.

🛱 Save 💧 Submit	🗧 🗧 🗧 🗧	tons → 📀	Dashboard	Search your ticket ID
Priority: OHigh Nor	nal 🔘 Low	Status: DLC-Not Submitted	0	People
Subject: * Enter summary				Reporter:
Link To:	Active All			Trainor, Carole
	Active Awards			OSP Assignee:
Awaru				Contract Administrator: *
Category:	Type: *	Award Arrival Date:		Shikes, Kristen A
			•	Watchers ()
Department: *				
VP for Research				
Description *				Dates
				Created:
				Updated:
				Duration
				Time in OSP:
Attachments 🔂 Add				Time in DLC:
🕒 Save 🚯 Submit	← Action Button	S		Time in DLC.
Good Carlo Subility	A retion Dutton			

Create Request Main screen

- 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.

(1)

- 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.

Link To:	Active All	Click to open award
Award	✓ Active Awards	in new tab
Award#: 000		ricte ~ 🔳
Title:		

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.

Award Details		
Award No:00001	Account No:	Award Status: Restricted - No Postings Allowed
Pl Name: I	Lead Unit:	Sponsor Award Id:
Anticipated Total: \$24,218,764.49	Authorized Total: \$138,227.22	Sponsor: Bill & Melinda Gates Foundation
Obligation Start: 06/10/2014	Obligation End: 06/09/2034	Final Expiration: 06/09/2034
Title:		
Close		

- 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 Activity			
New Child	Distribute Funds	Edits - Award Status	
New Child - Fab Equip	No Cost Extension	Edits - Award Rates	
 New Child - Participant Support 	Sponsor Prior Approval	Edits - Other Award Data	
New Award Received	• Limitation of Funds 🔗	 Modification/Amendment 	POPS category includes Types f
Signature - KC NOA	Change PI/Key Personnel or PI/KP Effort	• Signature - Approval	Kuali Coeus request forms
• New Account in Advance of Signed Award 🔗	Extend Account in Pending-Awaiting funds	Other Post-Award Activity	currently located on kc.mit.edu/forms-requests
POPS			7
New Sponsor	New Address Book	New Subaward Organization	

- 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

arch your ticket ID	٩
eople	
Reporter:	
Trainor, Carole	
OSP Assignee:	
Contract Administrator: *	
Shikes, Kristen A	
Watchers ()	

- **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.

Add Watchers	Add me as a watcher
Current Watchers	
Viejo, Pedro	×

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).

Notify	🗎 Save 🔥 Sub	ubmit 🙁 Delete	
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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).

Submit Service Request				
The Submit action will submit this request. Submitting the request will change the status of this request to "Awaiting CA Review"				
Comment				
Attachment				
Choose Files				
Submit Cancel				

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						
Id	Category	Туре	Subject			
Status	Reporter	OSP Assignee	Contract Administrator			
Award Arrival Date:		Created Date:				
From (MM/DD/YYYY)	To (MM/DD/YYYY)	From (MM/DD/YYYY)	To (MM/DD/YYYY)			
Module Item Key	Account Number	Sponsor	Department			

- 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 <u>ra-help@mit.edu</u>. 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.