

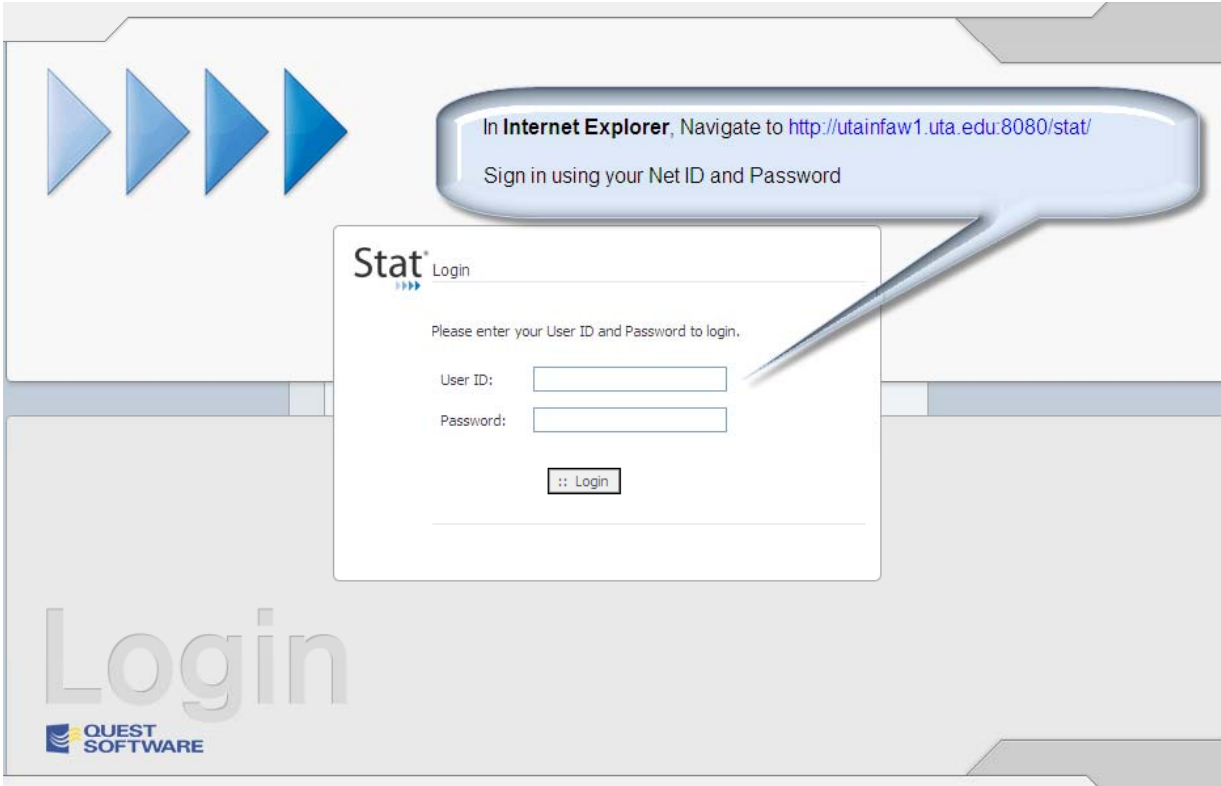
STAT Functional User Training

Keith Halman - EIS

September 10, 2008

Access Stat via the Web

- Currently, Internet Explorer is the only compatible browser



The screenshot shows a web browser window displaying the Stat Login page. In the top left corner, there are four blue right-pointing arrows. A light blue callout box with a pointer to the User ID field contains the text: "In Internet Explorer, Navigate to <http://utainfaw1.uta.edu:8080/stat/> Sign in using your Net ID and Password". The main login form is titled "Stat Login" and includes the instruction "Please enter your User ID and Password to login." Below this are two input fields: "User ID:" and "Password:". A "Login" button is positioned below the password field. At the bottom left of the page, the word "Login" is written in a large, light grey font, and the "QUEST SOFTWARE" logo is visible below it.

In Internet Explorer, Navigate to <http://utainfaw1.uta.edu:8080/stat/>
Sign in using your Net ID and Password

Stat Login
Please enter your User ID and Password to login.

User ID:

Password:

Login

QUEST SOFTWARE

Stat User Home Page

The screenshot shows the Stat User Home Page interface. The top navigation bar includes the Stat logo, a breadcrumb trail "MyStat", and user information "User: Keith Halman" with a "Logout" button. The main content area is divided into three sections: "My CSRs", "My Late CSRs", and "Default CSR Query".

Callout 1: "Always be Sure to Log Out!" points to the Logout button in the top right.

Callout 2: "Use the **Open CSR ID** and **Search** boxes to locate CSRs. Be sure to click on the **Triangle Arrow** to initiate the action." points to the "Open CSR ID" dropdown and the search input field.

Callout 3: "Click on **CSR ID** to open CSR detail." points to the "ACS-50" link in the "Default CSR Query" table.

CSR ID	Title	Created Date	Due Date	Priority	Status
ACS-50	Tenure Status' field value change	30 Sep 2008		70	In Spec Review
ACS-49	CBM014 Facilities Building Inventory Report	20 Sep 2008		80	In Development

From the Home Page, you can:

- Search for CSRs
- Look for Open CSRs
- Create New CSRs

CSR Entry Screen

CSR: ACS-50 - 'Tenure Status' field value change

CSR Information

CSR ID ACS-50

Service Domain UTA - PS CAMUS SOLUTIONS

Title 'Tenure Status' change

Customer Chiu,Chin

Application Institutional R

Environment

Type Customization

Priority 70

Customer Priority High

Project

Queue Technical Lead

Workflow Customization

Status In Spec Review

Tracking Number 200823406

Created Date 10 Sep 2008

Created By Asebedo,Sandra

Due Date 30 Sep 2008

Due Date 30 Sep 2008

Due Date 30 Sep 2008

Due Date 30 Sep 2008

Due Date 30 Sep 2008

Closed Date

CSR Details

Customer Priority: High Tracking #: 200823406

Department: INST RESEARCH, PLANNING & EFF Email Address: CHIU@UTA.EDU

Phone Number: (817)272-5839 Alt. Phone:

Description:

Normal Font Size

B I U [List Icons]

CS - Customization Change Notes

Change Description Required:

<<The 'NT-Accomp' and 'NT-TermDeg' Tenure Status values are no longer being used. Please remove these 2 values from the drop-down box on the Tenure Tracking page. The programming done for OIT project request 200821909 for these 2 values will also need to be removed.

Security Requirements Optional: <>

Enable Links View Source

Resolution:

Normal Font Size

B I U [List Icons]

CS - Customization Resolution

Completion Status: Required: <<>>

Enable Links View Source

Customer Priority follows traditional Critical, High, etc. CSR Priority is a number graded on a scale assigned by Project Mgmt.

Queue denotes group of users

Workflow is based on CSR type

Status is determined by stage of Workflow

Clicking on these items opens different areas of the CSR

Always Remember to CLOSE CSR!

Note the OIT Request# in Tracking# field

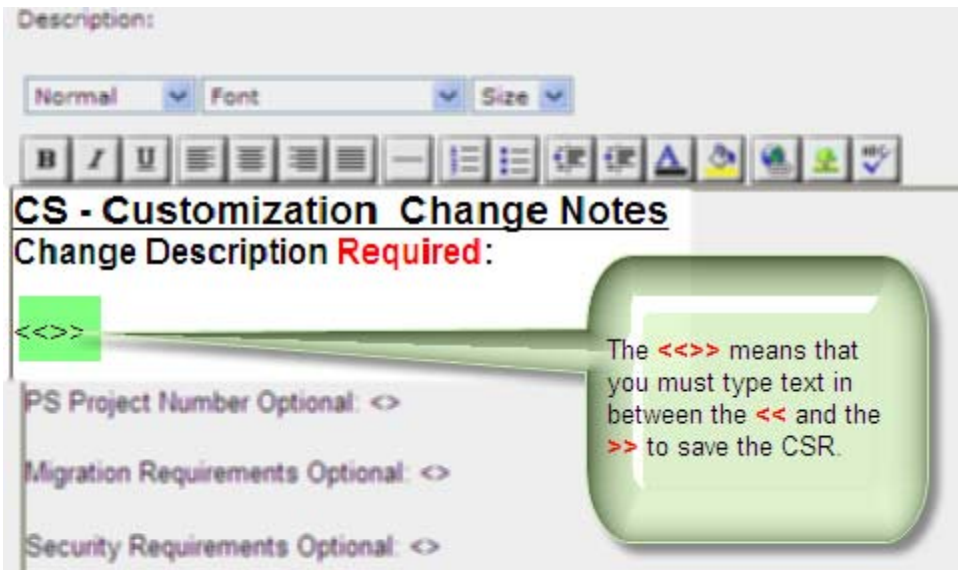
Required Notes must be typed between << >> symbols.

clicking Submit button saves changes to the CSR

Steps for Entering a CSR

1. From the Home Page, Choose [Actions](#) → [Create CSR](#) and select [UTA – Campus Solutions](#). Then Click ▶
2. Specify the CSR Title and Application Area.
3. Once the Application is specified, select the CSR type
4. Set the Queue to Manager and then set the Assign To field to either Keith Halman or Bill Daley
5. Specify the Customer Requesting the project. This typically needs to be the person who will test the results.
6. You can also set the priority field. However, OIT will reset this based on a scorecard methodology (TBD).
7. Change the due date to reflect when the request needs to be in Production by.

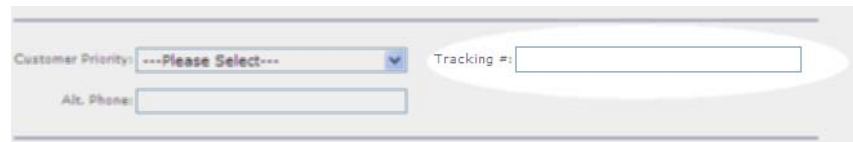
Steps for Entering a CSR (con't)



- Enter a description detailing what you need done.
- Be sure to type your text in between the << >>

CSR Entry Notes

- We will be working in parallel with the OIT Request System
- The Tracking# will record the OIT request#



A screenshot of a web form with a light gray background. It contains three input fields: a dropdown menu labeled 'Customer Priority' with the text '---Please Select---' and a blue arrow; a text input field labeled 'Tracking #' which is highlighted with a white oval; and another text input field labeled 'Alt. Phone'.

- Continue to enter your projects into the OIT Request System for now

Getting Assigned a CSR

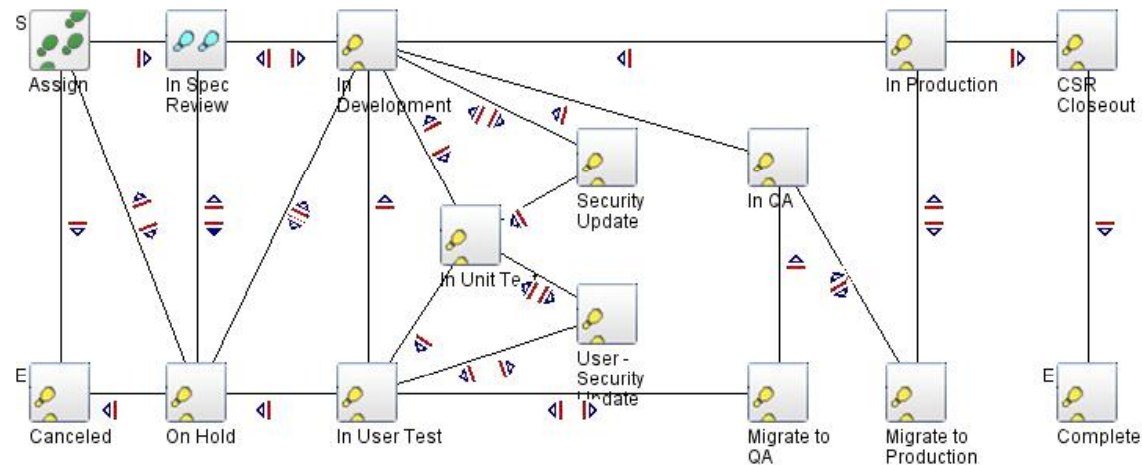
What to Expect

- CSRs have a workflow that changes by CSR type
- You will be assigned to the Functional Users Queue
- As Functional Users, you will be required to:
 - Complete tasks for testing of code
 - Verify that modifications are deployed
 - Forwarding the CSR in workflow
- You can add notes, logs, and attachments to the CSR after it is created.

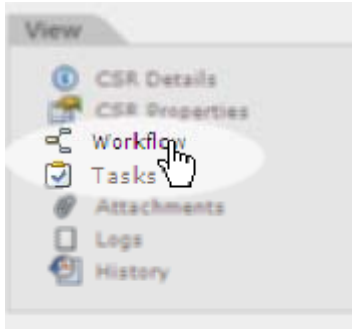
How 'Bout That Workflow?

- The Status of the CSR = Current Step of Workflow assigned
- The Blue Arrows indicate which step can occur next
- Some steps will have tasks that must be completed before advancing
- The Blue Feet indicate the current step

Graphical Workflow Display



Changing the Status



- Choose the Radio Button to Advance the Workflow
- Status Steps with ⚠ indicate more work to do.

Workflow

Change Status From: None

Current Status: Assign

Change Status To:

	Tasks Complete	Right	
<input checked="" type="radio"/> In Spec Review	✓	Yes	[view details]
<input type="radio"/> On Hold	✓	Yes	[view details]
<input type="radio"/> Canceled	✓	Yes	[view details]

Selecting the radio button sets the status of the CSR.

Click here to view the specific tasks that must be completed before advancing workflow.

[Graphical Workflow Display]

Click here to see the workflow for the particular CSR type.

Save

Changing Status (Con't)

Change Status From: None

Current Status: Assign

Change Status To:

	Tasks Complete	Rights	
<input checked="" type="radio"/> In Spec Review	✓	Yes	[view details]
<input type="radio"/> On Hold	✓	Yes	[view details]
<input type="radio"/> Canceled	✓	Yes	[view details]

Queue
Technical Lead

Assigned To
Please select assigned user
Please select assigned user
Asebedo, Sandra
Chen, Ruth
Hill, George
Holekamp, Joy
Lok, Sharon
Montgomery, Robert

After selecting the next Status values and saving the CSR. You will be required to select the Queue and person the CSR should be assigned to.

[Graphical Workflow Display]

Save

- Select the queue and user.
- The workflow restricts available queues and users listed.

Completing Tasks

- Transfer Rules are tasks to be done before going to the next step.

Workflow : Transfer Rules From Assign To In Spec Review

Type	Subtype	Subtype Value	Approver Name	Status	Complete	Minimum Approvals	Required	Last Update Date	By
In Queue	N/A	N/A	Manager		✓	N/A	true		

Email

Override Status Change Right: Yes
Change Status Right: Yes
Override Transfer Approval Right: Yes
Change CSR Queue Right: Yes
Change CSR Assigned User Right: Yes

This page allows you to see what tasks must be completed before proceeding to next step in workflow.

Clicking on a task will take you to the task detail.

Back to Workflow

Completing Task Detail

Tasks

Activity Type: Spec Review Start Date: 10 Sep 2008 10:23 AM
Title: Spec Review Due Date: 17 Sep 2008 12:34 PM
Assigned to: Asebedo, Sandra

% Complete: 0 Estimated Hours: 0.0
 Complete Auto Update % Complete
Completed Date: Actual Hours: 0.0

Billed Hours: 0.0 Bill Rate: 0.0

Comments:

Update Cancel Delete

Time Entries

Date	User	Hours	Notes
10 Sep 2008	Halman, Keith	0.00	

- Task Detail allows you to record:
 - Estimated Hours
 - Time Entry Logs
 - % Complete
 - Date/Time Completed
 - Notes about the task
- Tasks must be 100% complete before advancing workflow.
- Some Transfer Rules require multiple tasks be completed.
- Tasks can be assigned to multiple users.

Entering Time Spent on Tasks

Tasks

Activity Type: Start Date:

Title: Due Date:

Assigned to:

% Complete: Estimated Hours:

Complete Auto Update % Complete: Actual Hours:

Completed Date: Bill Rate:

Billed Hours: Comments:

Time Entries

Date	User	Hours	Notes
21 Apr 2009	Halman, Keith	0.5	
22 Apr 2009	Halman, Keith	1.0	

Apr 2009

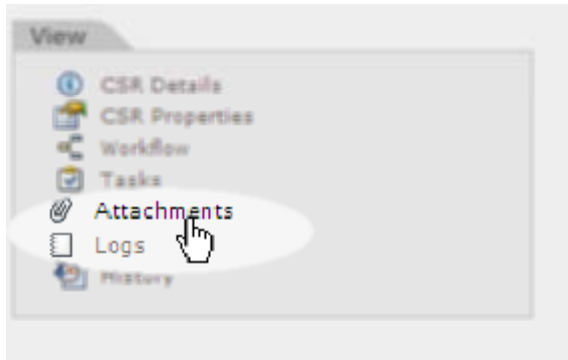
For Each Task You work on:

Enter the time spent on the task at the bottom of the task entry screen.

Be sure to click the box with the check mark in it to add the time to the **Actual Hours** total.

Click the **Update** button

Add Attachments to CSR



- Use to attach specifications
- Test Plans & Results
- Any other document of interest

Attachments

✕ Delete Selected

<input type="checkbox"/>	File Name	Comments	Submitter	Date Submitted	Size
No attachments found.					

File Comments:

Add

Cancel

Choosing a CSR Type

- Choose *9.0 Upgrade: XXXX* during upgrade
- Regular Work Flows will be re-directed to 9.0 after upgrade project

What About Other Requests?

- Reporting
- Departmental Apps
- Web Apps
- Will be coming online soon