



IssueTrak

End User Documentation

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Preface

IssueTrak software was purchased by Southside Virginia Community College in May 2009. Implementation of select areas of the software was in June 2009. We decided to proceed with the purchase of this product in order to better provide adequate audit trails and remove unnecessary paper pushing. This will attempt to open up lines of communication and promote sufficient documentation. Training is being provided starting in late July for full implementation of all areas by late July 2009. We will continue to build and develop the system as time permits.



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Accessing and Logging In

1. The website for IssueTrak is <https://southside.issuetrak.com>
2. Input your username (firstname.lastname)
3. Input your password
4. Click the Sign In button

IssueTrak's login page: <https://southside.issuetrak.com>



SOUTHSIDE VIRGINIA COMMUNITY COLLEGE

Please Sign In

User ID:

Password:

[Forgot your password?](#)

5. You will be brought to the welcome page.



SOUTHSIDE VIRGINIA COMMUNITY COLLEGE

Main Menu

Home - Issues for Test, Southside

Home

printer friendly

My SVCC

Global Issues

No Global Issues found.

My Issues

My Settings

Change Password

Submit Issue

Search Issues

Lookup Issue #

Log Out

Show Open Issues

- As Submitter (0)

My Reports

[Hide Shared Reports](#)

Sample Open Issues by Issue Type *
Sample Open Issues by Priority *

(S) Saved Search

* Shared



Change Password

It is suggested that you change your password from the default. Changing your password makes sure that IssueTrak is secure and safe.

- Step 1: Click on My SVCC
- Step 2: Click on Change Password

The screenshot shows the 'Change Password' page for a user named 'Test, Southside'. At the top left is the Southside Virginia Community College logo and name. Below it is a dark red navigation bar with 'Main Menu' and 'Change Password for Test, Southside'. On the left is a sidebar menu with options: Home, My SVCC (highlighted), My Issues, My Settings, Change Password (highlighted), Submit Issue, Search Issues, Lookup Issue #, and Log Out. The main content area has two input fields: 'New Password:' and 'Retype New Password:'. Below these is a 'Change Password' button. The text 'printer friendly' is visible in the top right corner.

- Step 3: Input your new password
- Step 4: Retype your new password
- Step 5: Click Change Password button

Forgotten Password

If you forget your password, please use the link on home page. Your password will be emailed to you.

The screenshot shows the 'Please Sign In' page. At the top left is the Southside Virginia Community College logo and name. Below it is a dark red navigation bar with 'Please Sign In'. The main content area has two input fields: 'User ID:' with the value 'SouthsideTest' and 'Password:'. Below these is a 'Sign In' button. At the bottom, there is a link that says 'Forgot your password?'.



My SVCC menu option

You will be brought to a home page each time you log into the system. Your home page may look similar and may not have as many options as noted below.

The screenshot shows the user interface for Daniel, Robin. At the top, there is a navigation bar with 'Main Menu' and 'Home - Issues for Daniel, Robin'. Below this, a sidebar menu lists various options including 'My SVCC', 'My Issues', and 'Submit Issue'. The main content area is divided into sections: 'Global Issues' (currently showing 'No Global Issues found'), and 'Show Open Issues' which lists several roles with their respective counts: Summary (134), As Submitter (134), As Enterer (153), As Assignee (307), As Assignee - Next Action Mine or Blank (304), As Next Action (207), and As Task Assignee (2988). There is also a 'printer friendly' link and a 'last login attempt: 07/22/2009' timestamp.

Global issues


Global Issues will be used to notify you of any problem that we are experiencing at one campus/location or all locations. If you see your problem listed here, you will not be required to submit a ticket for this issue. For instance, if there is a network outage or if any software application (SIS, Blackboard, Student Email, etc.) are completely down or experiencing extremely slow response times, this will be considered high priority and a global issue for us.

Show Open Issues

Show Open Issues displays an outline of all issue roles you are allowed to have and the number of open issues for each of those roles. Please note for tasks, this is the number of open tasks assigned to an individual not the open issues that have been assigned.




To access open assignments, click the desired item. You will be brought to a summary page of all items. Then you can click on the link to access the ticket.



SOUTHSIDE VIRGINIA COMMUNITY COLLEGE

Main Menu **Home - Issues for Daniel, Robin**



last login attempt: 07/22/2009
printer friendly 

Home

My SVCC

- Dashboard
- Dashboard Settings
- My Issues**
- My Settings
- Change Password
- Submit Issue
- Search Issues
- Lookup Issue #
- Unassigned Issues
- Knowledge Base
- Projects
- Reports
- Administration
- Important Links
- Unpaid Student List
- Log Out

Welcome to Southside Virginia Community College

Display Issues: 
 

Press shift key when clicking links to open in a new window.

| Task | Issue # | Subject | Assigned On | Assigned To |
|--|---------|---|-------------|---------------|
| Run merge process | 5 | Multiple Emplid: Group # 2043 | 05/11/2009 | Daniel, Robin |
| After merge - Run audit report | 5 | Multiple Emplid: Group # 2043 | 05/11/2009 | Daniel, Robin |
| After merge - Run Transcript | 5 | Multiple | | |



Submitting Issues

You will use the submit issue link to report issues or make requests. Depending on the issue type selected; the screen will format for that particular request. You will only be able to access issues that you have permission to access. You will have access to quick picks and standard issue types. If a quick pick is available for your issue, please use it before selecting an issue type.

Quick Picks

Quick picks can be used to select items quickly. To select one, click the drop down box. For a complete listing, please see Appendix A.

Issue Type and Subtypes

Issue types and subtypes are available for use when quick picks are not available. For a complete listing, please see Appendix B.

Depending on which Issue Type you select, different fields will be required. Required fields are marked with asterisk. Please provide as much information as possible in the description to help us solve your problem. If you need to set a deadline by which action needs to be taken on your issue, use the Required By Date Box. The Icons for the calendar and Clock allow you to easily select the deadline.

Once you have finished filling out the IssueTrak form for your issue click on the submit button. You will be given an issue number at the top and this will be added to your home page under Open Issues by Submitter.



Adding Notes

You can add notes to your ticket by selecting your issue. You may add notes by clicking the Add Note button or Add Note menu item. You can type additional text for the support person to review.

Adding Attachments

You can add attachments by clicking the Add attachment checkbox when submitting your issue. You will receive a window that allows you to browse to find your file on your local computer.

Priority

We have 4 priorities to choose from in the selection box.

1. Critical: Should only be used for complete system outage.
2. High: If it an urgent priority that has a time sensitive deadline. You should provide a required by date if this option is selected and available.
3. Medium: Standard for most issues.
4. Low: You need to make us aware of the issue but doesn't need to be completed prior to other open tickets.

Tasks

Working with tasks is simple. You will be assigned a particular task to complete. Most tasks are Yes/No tasks that allow you just to click on the task itself to say whether it is completed. The task is time/date stamped with your sign on name placed within the ticket. *Please note: You are not required to close the issue when working with tasks.*

Knowledge Base

The knowledge base contains important information about the systems to help support you. All SIS supporting documents, procedures and business practices, will be stored in this area for ease of access. The unpaid list has been added as a menu option for accessibility.



Who will have access to IssueTrak?

IssueTrak accounts will be setup for: administrators, classified staff, 9/12 month faculty, adjunct faculty, and wage employees. Student assistants, tutors, and workstudy's will not be setup with a username and a password to the system. Noncredit adjunct (Restricted) instructors will not be granted access to the system either.



Terminology

Southside Definitions

| | |
|-------------|---|
| Hardware: | Considered to be any of the following: CPU (box), monitor, laptop, keyboard, and mouse. |
| Software: | Any package that is running on your system, such as, the operating system, internet explorer, Microsoft Office Products (Word, Excel, Access, Powerpoint), etc. |
| Printer: | A device that prints text or graphics. |
| Peripheral: | Auxiliary device, such as a USB drive, external hard drive, modem, that works in conjunction with the computer. |

IssueTrak Definitions

| | |
|-----------------|--|
| IssueTrak: | A web-based application designed to capture any requests, questions, suggestions or problem that you might have. |
| Issues: | The main items tracked through IssueTrak. |
| Subject: | Short statement or title describing the issue. |
| Description: | A full description and/or addition information about the issue. |
| Issue Type: | A descriptive category the issue fits into, such as AIS, eVA, Employee Email, SIS, computer problems, etc. |
| Subtypes: | Detailed sub-categories that sort the issue within its issue type. |
| Notes: | Other additional information and/or comments related to the issue. |
| Attachments: | supporting documents stored in electronic format. |
| Workflow: | Additional activities involved in the addressing of issues. |
| Next action: | Delegation of the next general activity within an issue to a user or group that may or may not be the issue assignee. |
| Tasks: | Specific activities that need to be completed and/or require approval within an issue before it can be closed. |
| Issue Roles: | How different users are related to an issue. |
| Submitter: | The user who submitted the issue. |
| Enterer: | The user who entered the issue into the system. |
| Assignee: | The user responsible for addressing the issue. |
| Next Action: | The user responsible for the next action on the issue. |
| Task Assignee: | The user responsible for a task on the issue. |
| Quick Picks: | Common issues that can be selected from a drop-down list on the Submit Issue screen which populate basic information required to address the issue. This can include the Subject, Description, Issue Type/Subtype(s), Attachment(s), Assignee, Priority, Tasks, etc. |
| Knowledge Base: | A virtual library of information which may include answers to frequently asked questions, standard procedures, know resolutions, etc. |



Appendix A: Southside's Quick Picks

Everyone has access to these:

1. Blackboard: I need a course shell created
2. Blackboard:Needs sdnts enrolled in my seated crse
3. Blackboard:Stdnts not showing enrolled-online/hybrid
4. SIS_Multiple Emplid Request

Supervisors & Designees have access:

1. HR: Outprocessing Checklist - Full-time: CHR
2. HR: Outprocessing Checklist - Full-time: DAN
3. HR: Outprocessing Checklist - StdAsst/Wkstdy/Tutor
4. HR: Outprocessing Checklist - Wage/Adjunct
5. HR_NewWageEmployee
6. HR_NewAdjunctEmployee
7. HR_NewAdministrator
8. HR_NewClassifiedEmployee
9. HR_NewFaculty(9/12)
- 10.HR_NewStdntAsst/Tutor

Student Services, off campus that Program/Plan Place and Admissions:

1. StdntServices_PlanChangeRequest
2. StdntServices_Program Placement

Students:

1. Blackboard:Access to courses that not enrolled in
2. Blackboard:Can log-in, unable to access course(s)
3. I am having a problem with my student email
4. I am having trouble applying online for admission
5. I don't know my username and/or password
6. I don't remember my password
7. I need access to my transcript



Appendix B: Southside's Issue Types and Subtypes

Issue Type and Subtypes are available for use when quick picks are not available. For a complete listing, please see appendix A.

1. AIS (Administrative Info System)
 - a. Misc/Type Undetermined
 - b. Functional
 - c. Technical
 - d. Security/Access Issues
 - i. Data Owner Audit
2. Blackboard
 - a. Course Shells
 - b. Enroll Students
3. Computer Problem
 - a. Hardware Failure
 - b. Software Failure
4. Employee – add or update
 - a. New Hire
 - i. Adjunct
 - ii. Administrator
 - iii. Classified Staff
 - iv. Full-time Faculty (9/12 mo)
 - v. Student Assistant/Tutor
 - vi. Wage
 - vii. Workstudy
 - b. Update Personnel
 - i. Additional Access
 - ii. Name Change
 - iii. Reduce Access
 - iv. Role Change/Internal Transfer
 - v. Suspend Access
5. Employee – Exit
 - a. Full-time
 - i. Administrator
 - ii. Classified Staff
 - iii. Faculty (9/12 Month)
 - b. Part-time
 - i. Adjunct
 - ii. Administrator
 - iii. Student Assistant/Tutor
 - iv. Wage
 - v. Workstudy
6. Employee Email
7. eVA
 - a. Access/Security Changes
8. Installation Requests
 - a. Hardware
 - b. Peripherals
 - c. Printer
 - d. Software
9. IssueTrak
 - a. Request for New tasks
 - b. Request for New IssueTypes
10. Mainframe Applications (CIPPS, CARS)
 - a. Password Issues
11. Misc. Type unknown



12. MySVCC (Single Signon for AIS, BB, SIS, Stu Email)
 - a. Password
 - b. Request for Change of username
13. Network Connection Problem
 - a. Cannot log in to computer
 - b. No access to H: drive
 - c. No access to internet
 - d. No access to network share
14. Phone Problem
 - a. Cannot make call
 - b. Fax problem
 - c. Hardware failure
 - d. Voicemail Problem
15. Printer Problem
 - a. Printer Cartridge Request
 - b. Printer Maintenance
16. Records Request
 - a. Request for a Plan Change
 - b. Request for an Advisor Change
 - c. Program Placement
17. SIS (Student Information System)
 - a. Misc/type undetermined
 - b. Multiple Emplid
 - i. Groups for Deletion - Request VCCS
 - ii. Request to Other College
 - iii. Weekly Review
 - iv. Low Activity
 - c. Academic Advising
 - i. Subs not applying correctly
 - ii. New plan setup
 - d. Admissions
 - i. Online Application issue
 - e. Archived Data
 - i. Request Retrieval of data
 - f. Campus Community
 - i. Events
 - ii. External Orgs
 - iii. Add Person into SIS
 - g. Class Scheduling
 - i. Grade Roster Missing
 - ii. Add/Reactivate Course
 - iii. Change Credits after students enrolled
 - iv. Change Grading basis after students enrolled
 - v. Processing
 1. Dynamic Date
 2. Class Fee setup
 - vi. Business Process revision
 - vii. Daily query to update web
 - viii. Publication
 1. Files to Marken
 2. Note to webmaster to post the link for the schedule
 3. Reminder – Schedule Due
 - h. Financial Aid
 - i. Mass Change
 - ii. Setups
 - iii. Processes



1. Disbursement
2. Authorization
3. ISIR
4. Student Groups
- i. Security
 - i. Change SISCOPYID
 - ii. Request for SISCOPYID
 - iii. Run Security Process
 - iv. Access Audits
- j. Student Financials
 - i. Tuition Calc
 1. Error message
 2. Not correct balance
 - ii. Third Party Contracts
 - iii. Invoicing
 1. Request Student Invoices
 - iv. Payment Plans
 - v. Setups
 1. Tree Maintenance
 2. Term Setups
 3. New Item Type
 - vi. Refunding
 1. Credit Cards
 2. Financial Aid
 3. State Refund
 4. Noncredit
 5. Process Manual check
 - vii. Processing
 1. Table Validation
 2. GL
 3. Tuition Calculation
 4. Enrollment Cancellation
- k. Student Records
 - i. No matching buffer
 - ii. Repeat issue – Individual Student
 - iii. Graduation posting issue
 - iv. Request for Student Drop date
 - v. Transfer Credit posting issue
 - vi. Transfer Credit PROJECT
 - vii. Setups
 1. Academic Calendar
 2. Term Calendar
 3. Holiday Calendar
 4. Turn on Calendar
 - viii. Processing
 1. Discontinuation
 2. NSLC Submissions
 3. Term activation
 4. Repeat
 5. Honors/Awards
 6. Drop purge
 7. Create grade rosters
 8. QAS Address Cleanup
- l. Workforce Development
 - i. Add Org for Limited Enrollment Process
 - ii. Setups
 1. Academic Calendar



- 2. Term Calendar
 - 3. Holiday Calendar
 - iii. Middle College
 - 1. Verification of Students
 - 2. CRC data
 - iv. Workforce Web Registration
 - v. Motorcycle
 - 1. Process file transfer
 - vi. Drop Issues
 - m. Technical
 - i. Database update of files
 - n. Reporting
 - i. VCCS
 - 1. Graduation – gcard
 - 2. Handicap – hcard
 - 3. VCCS Enrollment Extract – vee
 - 4. Room inventory
 - 5. Room utilization
 - 6. WDS Annual report
 - 7. CSAP File
 - 8. Annual Financial Aid file
 - ii. SCHEV
 - 1. Annual course data file
 - 2. Degrees conferred
 - 3. Early enrollment
 - 4. Institution catalog survey
 - 5. Financial aid
 - a. CSAP
 - b. SCHEV S1/S2 Report
 - 6. Fall headcount
 - 7. Fall cohort
 - iii. Southside
 - 1. Fin Aid Reports
 - 2. NSLC
 - 3. Misc/Type undetermined
 - 4. FTE report
 - 5. Unpaid Tuition
 - 6. Query request – Creation and Move
 - 7. PTK
 - 8. Tek-XAM
 - 9. Workforce development
 - 10. Middle college
 - 11. Class # report for BB admin (course shells)
 - iv. Training Request
 - 1. Adjunct
18. Student Issue
 - a. Password
 - b. Blackboard
 - c. Email
 - d. SIS
 - e. Online application
 - f. Other



References

IssueTrak, Inc. (July 2009). *User Manual IssueTrak Version 9.0.1*. Virginia Beach, VA.