

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 the Office of Sponsored Programs for awards with existing accounts in Quali Coeus. **Note:** the following post-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

Via the Roles Database, the **Financial Primary Authorizer** for the department assigns the OST roles for administrative staff. There are two Department roles:

- **OST DEPT SPECIFIC ADMIN KC** → Authorized rights at the assigned unit only.
- **OST DEPT ADMIN KC** → Authorized rights 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>. Users must have a valid Kerberos ID to access the system.

Note:*OST uses Touchstone to authenticate users. Internet Explorer is not a supported web-browser for OST or other MIT web-based tools.

OST Dashboard

When you open OST, the **OST Dashboard** will display. Use the Dashboard to create requests, view active requests, and search for resolved requests.

My Requests will list all of the active requests that you have created or have been assigned as Watcher. Once a request is resolved, it will no longer display (but you can search for it using Advanced Search).

- By default, list is sorted by Id number with the most recent items listed first (highest number).
- Re-sort the list by clicking any column headings, i.e. *Type*, *Status*, etc.
- Click the assigned **Id** number to open the request Details.

The screenshot shows the MIT OSP Service Tracker dashboard. At the top, there is a navigation bar with the MIT logo, the text "OSP Service Tracker", and the user name "User : Trainor, Carole". Below the navigation bar, there is a section titled "MY REQUESTS" with a "Create" button and an "Advance Search" button. A search input field is present with the placeholder text "Search your ticket by ID". Below the search bar, there is a table of active requests. The table has columns for Id, Type, Subject, Status, Department, Reporter, Assignee, and Updated. Two requests are listed: one with Id 3115 and another with Id 2985. At the bottom of the dashboard, there is a "Send Feedback" link and a copyright notice: "Copyright © 2016, MIT OSP Service Tracker".

Id	Type	Subject	Status	Department	Reporter	Assignee	Updated
3115	New Child Account fo ...	6936614 - LoveProject2 Manalis	At OSP	Office of the Provost	Trainor, Carole	Viejo, Pedro	10-Dec-2017
2985	Question about repor ...	Help me NOW	At DLC	Office of the Provost	Trainor, Carole	Viejo, Pedro	28-Nov-2017

All Requests: Based on your authorization, you may see an *All Requests* tab in addition to *My Requests*. All Requests lists all active service requests in the departments where you are an OST administrator.



1. **Create** – Click to create a new service request
2. **Advance Search** – Click to search resolved tickets by status, award number, request type, etc. Select multiple fields to narrow your search. You may also use the asterisk wildcards * 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 if you are an assigned Watcher.

Create a Service Request

Click the **Create** button on the dashboard to build a new Service Request.

Complete the required fields (marked with red asterisk *) and enter Description

1. **Type** – click to select an option from the pop-up list. Be sure to select the correct *Type* as requirements in the Description will be based on your selection.

Select the type of Request	
Post Award	
Signatures on KC NOA	Change PI/Key Personnel
New Child Account	Change Award Status
New Child Account for Fab Equip	Correct Award Rates
New Child Account for Participant Support	Correct Other Award Data
Distribute Funds to/from existing child acct(s)	Limitation of Funds Notice
No Cost Extension Request	Question about allowability
Extend Account in Pending - Awaiting funds	Question about reports
Modification/amendment	Question: other
Sponsor Prior Approval	Other Post-award activity
Change PI Effort	Signatures/ Approvals

- Department** – Defaults to your home unit, but allows you to select other departments where you have an OST admin role.
- Reporter** – Defaults to user creating the request.
- Assignee** – Defaults to the OSP Contract Administrator for the selected department. When appropriate, you may select another OSP Administrator by clicking [Change](#), then clicking in the *Select an assignee* textbox and typing his/her name.

- Subject** – Enter a subject for this request that will be useful to you when viewing the request in the Dashboard or searching (for example, as *Type* already displays in the Dashboard, you may want to use the Account number, PI or other helpful descriptor).
- Award** – Select the radio button for **Active** (default) or **All**. Start typing any award data (i.e., Award number, Account number, PI name, Award Title, Department Name and Department Number – use a comma to search by multiple Award descriptors) and the drop down will display available options for selection.

Select the award for which you want to submit a request.

Note: If the displayed options do not match the award that you are looking for, you may override the field by manually entering data to complete your request.

Award ID	Description
0248	
024848-00002	: 2747270 Medard, Muriel Participant Support Costs - REU Supplement 267300 : RLE-Patterson/Coary Team
024801-00015	: 6933281 Sodini, Charles G B-1: Non-invasive Intracranial Pressure Estimation Towards a Fully Noninvasive Bedside Monitoring Device - SODINI
060600	: Microsystems Technology Laboratories
024878-00005	: 6933131 Palacios, Tomas MURI Palacios 060600 : Microsystems Technology Laboratories

- Description** – Based on the request *Type*, the Description field 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.
- Attachments** – Add attachments to this request, as appropriate.
- Priority** – Select the urgency of the request by clicking the radio button (Minor, Major or Critical). Criteria of urgency is at the discretion of the Reporter.
- Click **Submit** to complete the request. A pop-up window will prompt you to confirm that you want to submit the request. Click **Yes**.

A Pop-up window will indicate that the request was successfully submitted. Click **OK**

The system will automatically send a notification to the OSP Assignee.

View / Edit Service Request Details

Access the request Details from the OST dashboard by clicking on either the *ID number* of a request or the link provided in any of the OST notifications sent to you by email. The Details screen displays the request data and history, and provides options for further actions.

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

1 General - Displays request ID #, Subject, Type, Priority, Department, Status, Award Details, Description and Attachments.

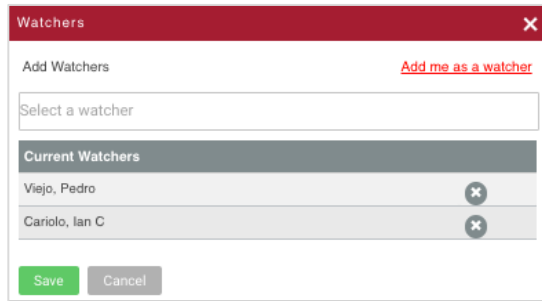
- **Status:** *At OSP* or *At DLC* indicates with whom the request currently resides. When a request is submitted, the initial status is “At OSP”. Length of time the request has been in that state displays in parentheses.
- **Attachments:** Click the **+ Add** icon to upload attachments and enter comments at any time.

2 Comments/History - displays actions and comments entered on the request in chronological order with the username and timestamp related to each action.

- **Comments:** click the ‘Pencil’ icon on the right and the *Comments* textbox will display. Enter text and click Submit. A notification with comments will be sent to the assigned OSP Administrator without changing the status of the request.

- **History:** click this tab to view actions that have been taken (without comments).

- 3 **People:** Displays *Reporter* (creator of the request), current *Assignee* (OSP Administrator) and *Watchers* (number in parentheses). 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 OSP* status and *Total time in DLC* status.

“Show history” link displays a list of the status, the user who took the action, action taken that changed the status, and the duration that the request remained in that particular status.

Action buttons appear in the red bar above the main *Detail* fields, and above the *Comments/History* section in the middle of the screen. The actions available to Department Administrators are:

- **Return:** When status is *At DLC*, use to send a notification to the OSP Assignee, thereby updating the Status to *At OSP*.
- **Notify:** Use to send an email to specified individuals. Recipients will receive an email with a link to view the details on this request. (Recipients must have a valid Kerberos ID to access the system.). Comments in the Notification are not incorporated in the request history, but the person’s name will display as a Watcher.
- **Edit:** Use to make changes to the general fields of the request.
- **Reopen:** Use to request additional work on a “Resolved” request. Reopening a request makes it active, returning it to the list of open items under “MY REQUESTS”. The status will be “At OSP”

Email Notifications

Actions taken in the OST system (create, return, add attachments, add notes, resolve, re-open, etc.) generates notifications to the individuals listed in the request and to its Watchers.

Email notifications provide a brief description of the action taken and a link to open the 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.



Help / Feedback

For questions or problems using OST, email ra-help@mit.edu. In your email, please include your Name and Contact Information. Please use the “[Send Feedback](#)” link at the bottom of the screen to alert us of issues or to send us suggestions.