ORSP SERVICE CENTER
USER TUTORIAL

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• Accessing the Service Center
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• Grant Manager Directory
• Action Categories and Types

For questions or support, contact ORSP at orsp@ohio.edu; 740.597.6777
ORSP SERVICE CENTER
ACCESSING THE SERVICE CENTER

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ORSP SERVICE CENTER
ACCESSING THE SERVICE CENTER

This is the ORSP Service Center Main Page

Welcome to the ORSP Service Center

My Open Tickets
View all open tickets where you are listed as an originator or PI/PO. You are currently listed on 1 open ticket.

My Tickets
View all tickets where you are listed as an originator or PI/PO.

Open Tickets
View all currently open tickets you can access. This includes:
- Tickets where you are listed as an originator or PI/PO
- Tickets associated with a UF or XI if you're in PI mode

All Tickets
View all tickets that you can access.

Create a Ticket
Create a New Ticket

If you have any questions or need any help, email orsp@ohio.edu or contact the ORSP Service Center at (740) 597-6777.
Your unit's Grant Manager is Bethany Spurrier (Telephone: (740) 593-9750; Email: spurrer@ohio.edu)
Click here for a directory of all grant managers.
ORSP SERVICE CENTER
CREATING A TICKET

You can create a new ticket from the ORSP Service Center or the LEO menu.

For questions or support, contact ORSP at orsp@ohio.edu; 740.597.6777
You can create a new ticket from a Transmittal or UT.

From a UT, select “View Tickets” and then “Create a New Ticket”.

On a Transmittal Review page, you can see any associated tickets, or create a new one by selecting “Create a New Ticket”.

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ORSP SERVICE CENTER
CREATING A TICKET

You can also create a new ticket based on a previous ticket.

Welcome to the ORSP Service Center
Ticket Number 1894 (Completed)

Click this icon. A new ticket will be created with all the same information as this one.
Welcome to the ORSP Service Center

- This is your assigned ticket number
- Current ticket status

Fields are explained on the following slides

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ORSP SERVICE CENTER
COMPLETING AND SUBMITTING A TICKET
TICKET FIELDS

• Ticket Status: The current status of the ticket
  • New: Created but hasn’t been sent to the Service Center
  • Queued: In the Service Center’s Queue but not assigned
  • Assigned: Assigned to a Manager
  • Returned: Returned from a Manager to the Service Center for further action
  • Completed: All actions completed; ticket it closed
  • Cancelled: Ticket was closed without action

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ORSP SERVICE CENTER
COMPLETING AND SUBMITTING A TICKET
TICKET FIELDS

• PI/PD Name/Email/Phone: The PI or PD associated with the project (optional).
  • Selecting “I am the PI” will fill in this information automatically from your HR record

• eTF: The electronic Transmittal ID associated with this ticket (will be automatically filled in if you create a ticket from a Transmittal)

• UT: The Uniterm number associated with this ticket (will be automatically filled in if you create a ticket from a UT)

(Clicking the first icon next to the eTF/UT field will allow you to search for a transmittal or UT. Clicking the second icon will display the transmittal or UT identified in the corresponding field)

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ORSP SERVICE CENTER
COMPLETING AND SUBMITTING A TICKET
TICKET FIELDS

• Due Date: The date by which this action needs to be completed
• Action Category: The Category of action to be taken for this ticket
• Action Type: The type of action to be taken for this ticket (A complete list of Action Categories and Types is at the end of this presentation)
• Subject: A short, descriptive subject for the ticket
• Description: Explain clearly and in as much detail as necessary what action(s) you are requesting from the manager
• Comment: This is placed into a comment log and is used to document progress and updates to the ticket over time

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Send update notifications: If these boxes are checked, the corresponding person/people (you and/or the PI) will receive email updates as the ticket progresses.

Save and Close: Save your changes on this ticket, but don’t submit it to the Service Center (nobody will see this ticket until after it’s submitted)

Submit to Service Center: Save your changes and send it to the Service Center for action

Cancel Ticket: Cancel this ticket and don’t send it (the number will be used up, but it won’t show up on any of your pages)

Exit Without Saving: Exit this page without saving any changes (it will remain accessible by you, but nobody else)
ORSP SERVICE CENTER
COMPLETING AND SUBMITTING A TICKET

• Once you submit the ticket, you’ll see the following acknowledgement page:

Welcome to the ORSP Service Center

Ticket number 1469 has been submitted to the ORSP Service Center. You should receive a response within two business hours.

- View your ticket
- View all your open tickets
- View all your tickets (including closed and cancelled tickets)
- Create another ticket
- Exit the Service Center

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Your unit’s Grant Manager is Bethany Spurrier (Telephone: (740) 593-9750; Email: spurrier@ohio.edu)
Click here for a directory of all grant managers.
All Ticket lists will appear in a table like this:

<table>
<thead>
<tr>
<th>Created</th>
<th>Received</th>
<th>Completed</th>
<th>Due Data</th>
<th>Subject</th>
<th>Action Category</th>
<th>Action Type</th>
<th>PI/PID</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1470</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1469</td>
<td>01/11/2017 3:25 PM</td>
<td>Closeout</td>
<td>Record Retention</td>
<td>32247</td>
<td>19915</td>
<td>Finney, Michael</td>
<td>Sournier, Bethany</td>
<td>Completed</td>
</tr>
<tr>
<td>1468</td>
<td>01/11/2017 3:39 PM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>804</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>659</td>
<td>09/15/2016 11:02 AM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>617</td>
<td>09/12/2016 5:05 PM</td>
<td>Unknown</td>
<td>Unknown</td>
<td>32256</td>
<td>19796</td>
<td>Hibbard, Timothy</td>
<td></td>
<td>Cancelled</td>
</tr>
<tr>
<td>500</td>
<td>09/12/2016 1:23 PM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- The buttons at the top can be used to display or hide various fields
- The pull-down lists at the bottom can be used to filter for data in each field
- The search field at the top will search all fields for whatever you type (not case-sensitive)
- Click on any column header to sort by that column
- Click on the magnifying glass to view that ticket
ORSP SERVICE CENTER
LISTING TICKETS

• My Open Tickets
  • Shows all open tickets where you are listed as the Originator or PI/PD

• My Tickets
  • Shows all tickets (open, completed, cancelled) where you are listed as the Originator or PI/PD
ORSP SERVICE CENTER
LISTING TICKETS

• Open Tickets
  • Shows all submitted, open tickets that you have access to
  • Does not include new tickets that haven’t been submitted
  • Includes tickets where you are the Originator or PI/PD
  • Includes tickets associated with a UT or eTF you are
    associated with
  • If you are a delegate, includes all tickets for your unit(s)

• All Tickets
  • Shows all tickets that you can access, regardless of status
  • Includes all the categories listed above under “Open
    Tickets”
  • This list may take a long time to load
ORSP SERVICE CENTER
TICKET COMMENTS

- Comments can be added to any open ticket you’re able to access
- Comments will be sent via email to the assigned manager (if it isn’t assigned yet, all comments will be sent when a manager is assigned)

Welcome to the ORSP Service Center
Ticket Number 1469 (Queued)

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Your unit’s Grant Manager is Bethany Spurrier (Telephone: (740) 593-9750; Email: spurrier@ohio.edu)
Click here for a directory of all grant managers.
Your Grant Manager is listed at the bottom of all Service Center pages.

You can also find any individual’s or unit’s Grant Manager by clicking the link in this box or selecting “Grant Manager Directory” from the Service Center menu or the LEO home page.
You can also find any individual’s or unit’s Grant Manager by clicking the link in this box or selecting “Grant Manager Directory” from the Service Center menu or the LEO home page.

Welcome to the ORSP Service Center
Grant Manager Directory

Enter a unit or faculty member’s name. The assigned manager will appear below.

Locate by Unit: Clear
Locate by Faculty Member: Clear

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ORSP SERVICE CENTER
GRANT MANAGER DIRECTORY

• Start entering a name, and options will be displayed to select

Welcome to the ORSP Service Center
Grant Manager Directory

Enter a unit or faculty member’s name. The assigned manager will appear below.
Locate by Unit: [ ]
Locate by Faculty Member: [ ]

If you have any questions or need any help, email orsp@ohio.edu or contact the ORSP Service Center at (740) 597-6777.

• After you select the Unit or Faculty Member name, the Grant Manager will be displayed

Welcome to the ORSP Service Center
Grant Manager Directory

Enter a unit or faculty member’s name. The assigned manager will appear below.
Locate by Unit: Voinovich School
Locate by Faculty Member: [ ]

Voinovich School: Bethany Spurrier, Phone: (740) 593-9750, Email: spurrier@ohio.edu

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ORSP SERVICE CENTER
ACTION CATEGORIES AND TYPES

- Generating Your Idea
  - Grant Writing and Development
  - Internal Funding Opportunities
- Funding Opportunities
  - Funding Opportunities (PIVOT)
  - Gift vs. Grant
  - Grants
  - Contracts
  - Limited Submissions Process
  - Designated Advancement Primacy Sponsors
  - Subsidiaries
  - Core

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• Proposal
  • PI/PD Eligibility
  • Intent to Submit
  • Proposal forms/format/package prep
  • Review and interpret proposal guidelines
  • Budget
  • Compliance
  • Contract Preview
  • Research Incentive Distribution
  • Space
  • Subrecipients
  • Intellectual Property (IP) and Tech Transfer (TT)

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ORSP SERVICE CENTER
ACTION CATEGORIES AND TYPES

- Proposal Submission
  - Transmittal Form for Proposal Review and Approval
  - Electronic Systems
  - Authorized Organizational Representative (AOR)
  - Contract Submission

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ORSP SERVICE CENTER
ACTION CATEGORIES AND TYPES

• Award Negotiation and Setup
  • Just-in-time requirements
  • Departmental Guarantee Account
  • Contract Negotiation
  • Notice of Award
  • New Sponsor/Customer Setup
  • Terms and Conditions
  • Subcontracting
  • Purchased Service
  • Signature Authority
  • Account Setup
  • Payment Terms and Billing Requirements
  • Award Acceptance
  • Compliance

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ORSP SERVICE CENTER
ACTION CATEGORIES AND TYPES

- Award Management
  - Audits
  - Modification
  - Equipment Inventory Management
  - Monitor expenditures
  - Report
  - Renewal proposals/awards/continuations
  - Time and Effort Reporting
  - Cash Management
  - FOIA or Open Records Request
  - Research Incentive (RI) Distribution
  - Student Stipends
  - Procurement

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ORSP SERVICE CENTER
ACTION CATEGORIES AND TYPES

- Closeout
  - Closeout
  - Relinquishments
  - Terminations
  - Record Retention
- Infrastructure
  - Service Center
  - LEO
  - Record Management
  - Communications
  - Training Program
- Unknown
  - Unknown

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