

# ORSP SERVICE CENTER USER TUTORIAL

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- Accessing the Service Center
- Creating a Ticket
- Completing and Submitting a Ticket
- Listing Tickets
- Ticket Comments
- Grant Manager Directory
- Action Categories and Types

# ORSP SERVICE CENTER

## ACCESSING THE SERVICE CENTER

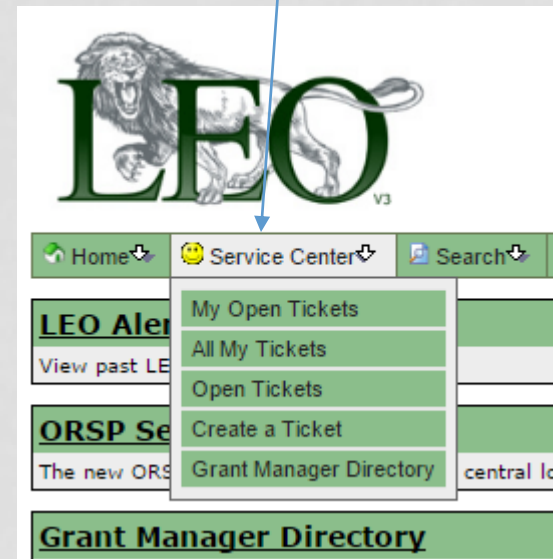
From the LEO Home Page



The screenshot shows the LEO Home Page with a navigation menu at the top containing Home, Service Center, Search, Transmittals, and Compliance. Below the menu are several sections: LEO Alerts, ORSP Service Center (highlighted with a blue arrow), Grant Manager Directory, Transmittal System, and Departmental Guarantee Memorandum.

OR

From the menu



The screenshot shows the LEO Home Page with the Service Center menu open. The menu options are: My Open Tickets, All My Tickets, Open Tickets, Create a Ticket, and Grant Manager Directory. A blue arrow points to the Service Center menu item.

# ORSP SERVICE CENTER

## ACCESSING THE SERVICE CENTER

This is the ORSP Service Center Main Page



[Home](#) [Service Center](#) [Search](#) [Transmittals](#) [Compliance](#) [Extensions](#) [Awards](#) [Funding](#) [Save PDF](#) [LogOut \(straw\)](#)

## Welcome to the ORSP Service Center

### **My Open Tickets**

View all open tickets where you are listed as an originator or PI/PD. You are currently listed on 1 open tickets.

### **My Tickets**

View all tickets where you are listed as an originator or PI/PD.

### **Open Tickets**

View all currently open tickets you can access. This includes:

- Tickets where you are listed as an originator or PI/PD
- Tickets associated with a UT or eTF you're named on

### **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](mailto: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: [spurrier@ohio.edu](mailto:spurrier@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

**Welcome to the ORSP Service Center**

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

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

**Open Tickets**  
View all currently open tickets you can access. This includes:  
• Tickets where you are listed as an originator or PI/PD  
• Tickets associated with a UT or eTF you're named on

**All Tickets**  
View all tickets that you can access.

**Create a Ticket**

If you have any questions or need any help, email [orsp@ohio.edu](mailto: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: [spurrier@ohio.edu](mailto:spurrier@ohio.edu))  
[Click here for a directory of all grant managers.](#)

**LEO**

Home Service Center Search

LEO Alerts  
View past LE

ORSP Service Center  
The new ORSP

My Open Tickets  
All My Tickets  
Open Tickets  
Create a Ticket  
Grant Manager Directory central lo

**Grant Manager Directory**

OR...

# ORSP SERVICE CENTER

## CREATING A TICKET

You can create a new ticket from a Transmittal or UT

From a UT, select "View Tickets"

Space	
<b>On Campus Space</b>	
<b>Room Number</b>	<b>Building Name</b>
104, 106, 109, 121, 200, 207, 210A, 210B	Building 22, The Ridges
115, 215	Building 21, The Ridges
<b>Associated Tickets</b> <a href="#">Create a New Ticket</a>	
<b>Routing Table</b> If you notice that the routing table is not correct please contact Mike Bump at 593-2858 with reference to transmittal number: 32247.	
<b>Faculty/Staff Queue</b>	

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

Return To Search   <a href="#">View Proposals</a>   <a href="#">View Comments</a>   <a href="#">View Files</a>   <a href="#">View Budget</a>   <a href="#">View Expenditures</a>   <a href="#">View Space</a>   <a href="#">View Tickets</a>			
<b>Uniterm Headers</b>			
<b>Uniterm Number:</b>	19915		
<b>Project Title:</b>	Redistricting 2021		
<b>Project Sponsor:</b>	Ohio Legislative Service Commission		
<b>Faculty:</b>	Barber-Delach, Robert		
<a href="#">Create a New Ticket</a>			
<b>Ticket Number 1265</b>			
<b>Subject:</b>	General Question	<b>Received:</b>	12/05/2016 09:09:00 AM
<b>Originator:</b>	Pauwels, Jennifer	<b>Action Category/Type:</b>	Award Negotiation and Setup / Departmental Guarantee Account
<b>Assignee:</b>	Spurrier, Bethany	<b>Status:</b>	Completed
<b>Files:</b>	<a href="#">DGM 19915.msg</a>		
<b>Ticket Number 1253</b>			
<b>Subject:</b>	please start a new ticket for Redistricting 2021 DGM request	<b>Received:</b>	12/02/2016 01:01:00 AM
<b>Originator:</b>	Finney, Michael	<b>Action Category/Type:</b>	Award Negotiation and Setup / Departmental Guarantee Account
<b>Assignee:</b>	Spurrier, Bethany	<b>Status:</b>	Completed
<b>Files:</b>	<a href="#">please start a new ticket for Redistricting 2021 DGM request.msg</a>		


Then "Create a New Ticket"

# 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.






# ORSP SERVICE CENTER

## COMPLETING AND SUBMITTING A TICKET

### Welcome to the ORSP Service Center

This is your assigned ticket number **Ticket Number 1468 (New)** Current ticket status

Created 01/11/2017 at 2:57 PM by Wayne Strav

<b>PI/PD:</b> PI's name <input type="checkbox"/> I am the PI	<b>Email:</b> PI's email address	<b>Phone:</b> PI's phone number
<b>*Source:</b> LEO	<b>*Date/time received:</b> 01/11/2017 at 2:59 PM	<b>eTF:</b> Transmittal ID  
<b>*Action Category:</b> <input type="text"/>	<b>Due Date:</b> <input type="text"/> 	<b>UT:</b> UT Number  
<b>*Action Type:</b> Select Category First <input type="text"/>		<b>Files:</b>  Add files to ticket
<b>*Subject:</b> <input type="text"/>		
<b>*Description:</b> <input type="text"/>		

Fields are explained on the following slides

Send update notifications to:  Me  PI/PD Save And Close Submit to Service Center Cancel Ticket Exit Without Saving

**New Comment:**

If you have any questions or need any help, email [orsp@ohio.edu](mailto: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: [spurrier@ohio.edu](mailto:spurrier@ohio.edu))

[Click here for a directory of all grant managers.](#)

# 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 is closed
  - Cancelled: Ticket was closed without action



# 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)**

# 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

# ORSP SERVICE CENTER

## COMPLETING AND SUBMITTING A TICKET

### TICKET BUTTONS

Send update notifications to:  Me  PI/PD

Save And Close

Submit to Service Center

Cancel Ticket

Exit Without Saving

- 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](#)

**If you have any questions or need any help, email [orsp@ohio.edu](mailto: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: [spurrier@ohio.edu](mailto:spurrier@ohio.edu))

[Click here for a directory of all grant managers.](#)

# ORSP SERVICE CENTER

## LISTING TICKETS

All Ticket lists will appear in a table like this:

Use the buttons to activate or deactivate columns. Click a column heading to sort by that column. You can also search using the search box or filter by using the pulldown lists at the bottom of each column.

[Reset Filters](#)

Created	Received	Completed	Due Date	Subject	Action Category	Action Type	eTF	UT	Creator	Originator	PI/PD	Assigned To	Status	Search:							
▲	#	◆	Received	◆	Due Date	◆	Action Category	◆	Action Type	◆	eTF	◆	UT	◆	PI/PD	◆	Assigned To	◆	Status	◆	
	1470																			New	
	1469	01/11/2017 3:28 PM			Closeout	Record Retention	32247	19915	Finney, Michael	Spurrier, Bethany										Completed	
	1468	01/11/2017 3:39 PM																			Cancelled
	884																				New
	659	09/15/2016 11:02 AM					32256	19796	Hibbard, Timothy												Cancelled
	617	09/12/2016 5:05 PM			Unknown	Unknown															Cancelled
	598	09/12/2016 1:23 PM																			Cancelled

Showing 1 to 7 of 7 entries Previous 1 Next

[Export to Excel](#) [Export to PDF](#)

- 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)

Created 01/11/2017 at 3:26 PM by Wayne Straw

<p><b>*Originator:</b> Straw, Mike <b>PI/PD:</b> Finney, Michael <b>*Source:</b> LEO <b>*Action Category:</b> Closeout <b>*Action Type:</b> Record Retention <b>*Subject:</b> Record retention extension <b>*Description:</b> Please extend the retention on this UT for 10 years.</p>	<p><b>*Email:</b> straw@ohio.edu <b>Email:</b> finney@ohio.edu <b>*Date/time received:</b> 01/11/2017 at 3:28 PM <b>Due Date:</b> <b>Assignee:</b> Bethany Spurrier</p>	<p><b>Phone:</b> (740)593-1043 <b>Phone:</b> (740)593-4389 <b>eTF:</b> 32247 <b>UT:</b> 19915 <b>Files:</b></p>
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Send update notifications to:  Originator  PI/PD

[View Comments](#)

[Add Comment](#) [Exit](#)

**New Comment:**

## Enter Comment Here

Click to save

If you have any questions or need any help, email [orsp@ohio.edu](mailto:orsp@ohio.edu) or contact the ORSP Service Center at (740) 597-6777.  
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# ORSP SERVICE CENTER

## GRANT MANAGER DIRECTORY

- Your Grant Manager is listed at the bottom of all Service Center pages

If you have any questions or need any help, email [orsp@ohio.edu](mailto: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: [spurrier@ohio.edu](mailto:spurrier@ohio.edu))

[Click here for a directory of all grant managers.](#)

- 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.

# ORSP SERVICE CENTER

## GRANT MANAGER DIRECTORY

- 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:

Locate by Faculty Member:

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

# 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](mailto: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:

Locate by Faculty Member:

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

# 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

# ORSP SERVICE CENTER

## ACTION CATEGORIES AND TYPES

- 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)

# ORSP SERVICE CENTER

## ACTION CATEGORIES AND TYPES

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

# 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

# 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



# ORSP SERVICE CENTER

## ACTION CATEGORIES AND TYPES

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