

Division of Research Ticketing System: User Guide

Introduction

The Division of Research Ticketing/Tracking system is available for researchers and other users of the Division of Research to submit inquiries, request help, and request information in regards to their proposals, IRB applications, IACUC applications, COI, or Niner Research in general. This document is intended to provide an overview of how to submit a ticket and use Smartsheet Dynamic View to interact with your tickets. Sections describe:

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Submitting a New Ticket

To submit a new ticket to the Division of Research navigate to the ticket submission form located on the DR website or from this link <https://app.smartsheet.com/b/form/c757152971644cb8afc1e8910a217333>

The ticket submission form can be filled out and submitted on someone's behalf. If submitting on someone's behalf, be sure to include both your's and their @uncc.edu email address in the UNC Charlotte Email(s) field on the form. This will allow both you and the person you are submitting for to view the ticket in Dynamic View. The information requested on the form is as follows:

Required Information

1. Fill out form with all required information

NOTES: If submitting on someone's behalf:

- A. Enter the PI's NinerNET username into the UNC Charlotte User Name field.
- B. Enter the PI's name (First and Last) into the Name field.
- C. Enter the PI's @uncc.edu email address into the UNC Charlotte Email(s) field.
 - a. You can add multiple emails to this field if necessary
- D. Select the PI's Department/Center

Submitter Information

Note: If you are filling out this form on someone's behalf be aware that only the individual(s) who's email is entered into the "UNC Charlotte Email(s)" field will receive update requests and have access to view, edit, or comment on this ticket in Dynamic View.

UNC Charlotte User Name *
NinerNET user name of submitter

Name *
First and last name of the submitter

UNC Charlotte Email(s) *
Please use your @uncc.edu email address. Using your @charlotte.edu email address may result in you not being able to view your ticket in Dynamic View.

Emails added to this field will have access to view this ticket in Smartsheet Dynamic View and will be included on any automated messages sent by Smartsheets.

Include the submitters email (**Required**) and **one** other correspondence email if applicable. (**No more than 2 emails total**)

Must be a uncc.edu email address. **Do not use alias email**

If adding more than one email use this format (xxxxxx@uncc.edu, xxxxxx@uncc.edu)

College/Center *

3. Fill out required ticket information
 - a. Ticket Summary: One line summary of the ticket (Title)
 - b. Choose a ticket category:
 - i. Proposal Development
 - ii. Award Management
 - iii. Contracting
 - iv. Research Compliance
 - v. Niner Research Technical issue

- c. Sub-topic the ticket pertains to (This field is not required to submit the form but must be chosen before the ticket can be routed correctly)
- d. Full Description of the ticket being submitted

Ticket Information

Summary *
Please provide a one line summary of the ticket

Ticket Category *

Proposal Development Topic
Optional: Select a sub-category if known. Leave blank if unsure.

Description *
Provide a detailed description of the ticket

Provide the full description of the ticket (issue, question, requested information, etc.) that is being submitted.

Optional Information

The “Record identification” section of the form is not required for submission of the ticket but is helpful if the ticket pertains to a specific record in Niner Research.

If applicable:

1. Enter the Record number for the record the ticket pertains to
2. Enter the records PI’s name
3. Upload any documents that would be helpful for the ticket

Record Identification
This section is intended to help identify the record the ticket pertains to if applicable.

Record Identifier
If applicable: Provided the record number of the proposal or application this ticket pertains to.

(Ex: IPF23-0001 or IRB-23-0001)

Project PI Name
If applicable: Provide the first and last name of the PI for this record

File Upload
Please attach any document you have related to your ticket request

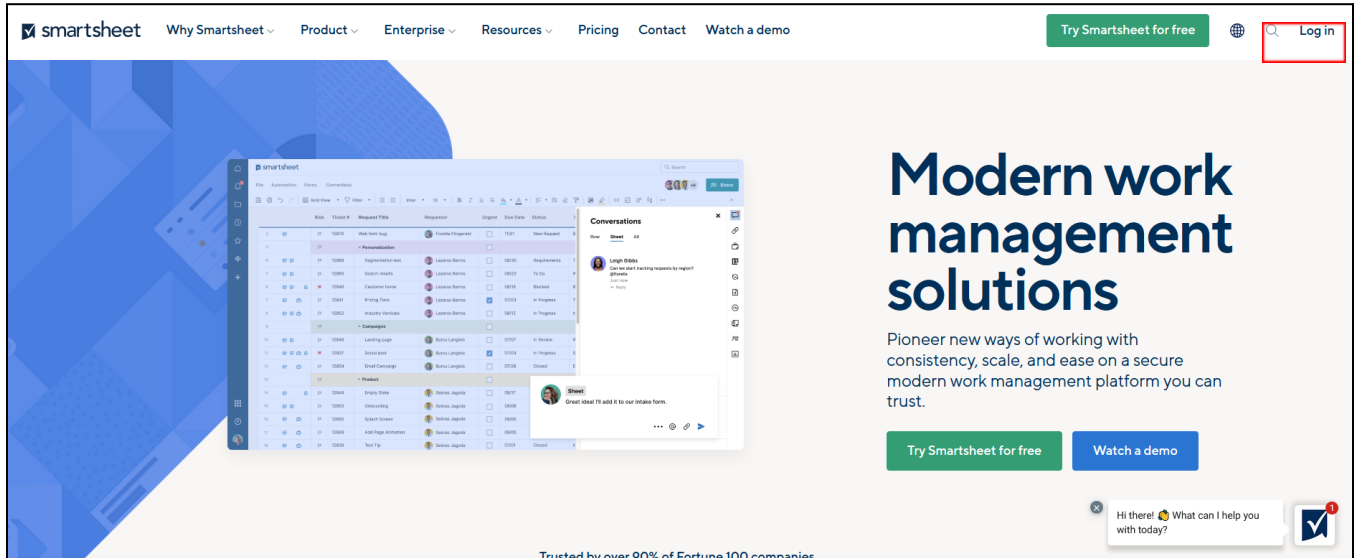
Drag and drop files here or [browse files](#)

Logging to Smartsheet

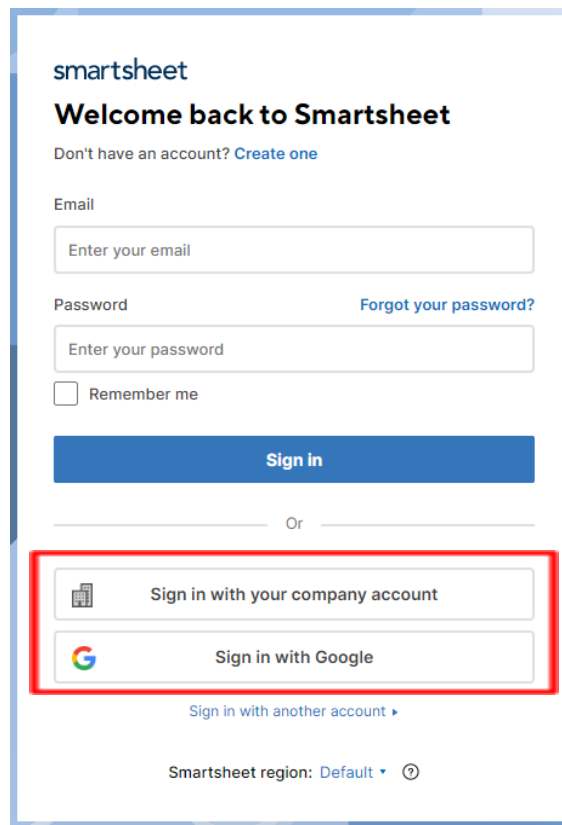
Overview: To use Smartsheet Dynamic View you must first create a free Smartsheet account using your UNC Charlotte credentials.

How to create a free Smartsheet account

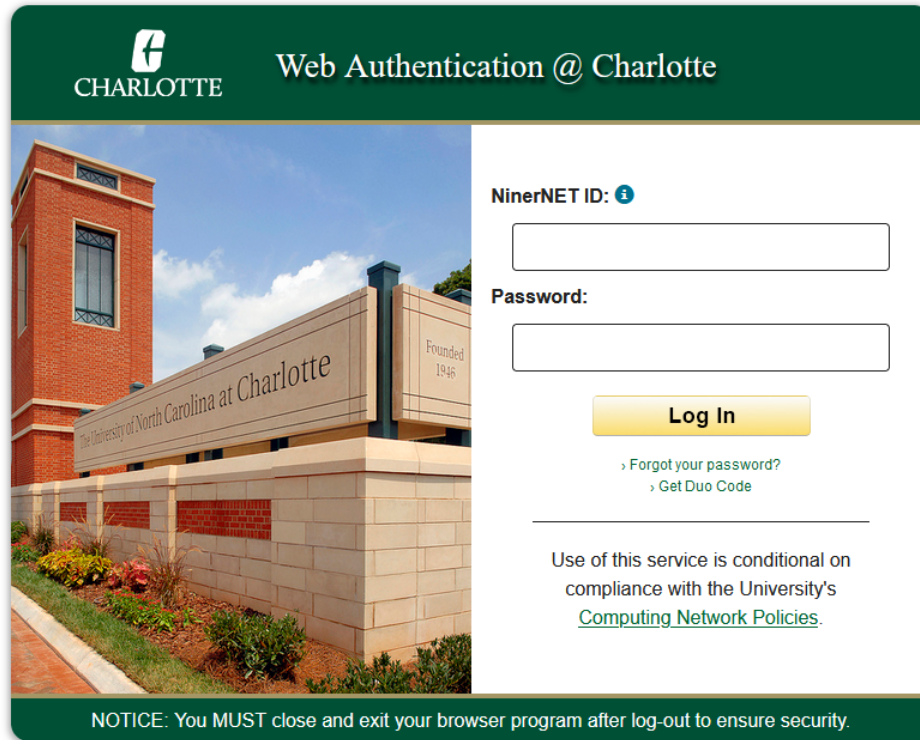
1. Open Smartsheet using the URL <https://www.smartsheet.com/>
2. Click “Login” located at the to right of the page



3. Choose either “Sign in with your company account” or “Sign in with Google”



4. Enter your @uncc.edu email address into the “Email or phone” field. **DO NOT** use an alias email, the email **MUST** be your original @uncc.edu email address.
5. If done correctly, you will be redirected to the Web Authentication@Charlotte login page.



webauth02

6. From here, login using your UNC Charlotte credentials

You have now created a free Smartsheet account and are connected to the UNC Charlotte Smartsheet domain.

IMPORTANT:

Smartsheet will have a message at the top of the screen that reads “You have limited access to Smartsheet. Upgrade to use premium features”. You **DO NOT** have to upgrade to a premium account to use the DR - Ticketing system.

Navigate to DR Ticketing system in Dynamic View


Once you have a free smartsheet account you can access the “DR - Division of Research Ticket Submissions” view in Smartsheet Dynamic View. The DR - Division of Research Ticket Submissions view allows you to see all the tickets you have submitted or are associated with.

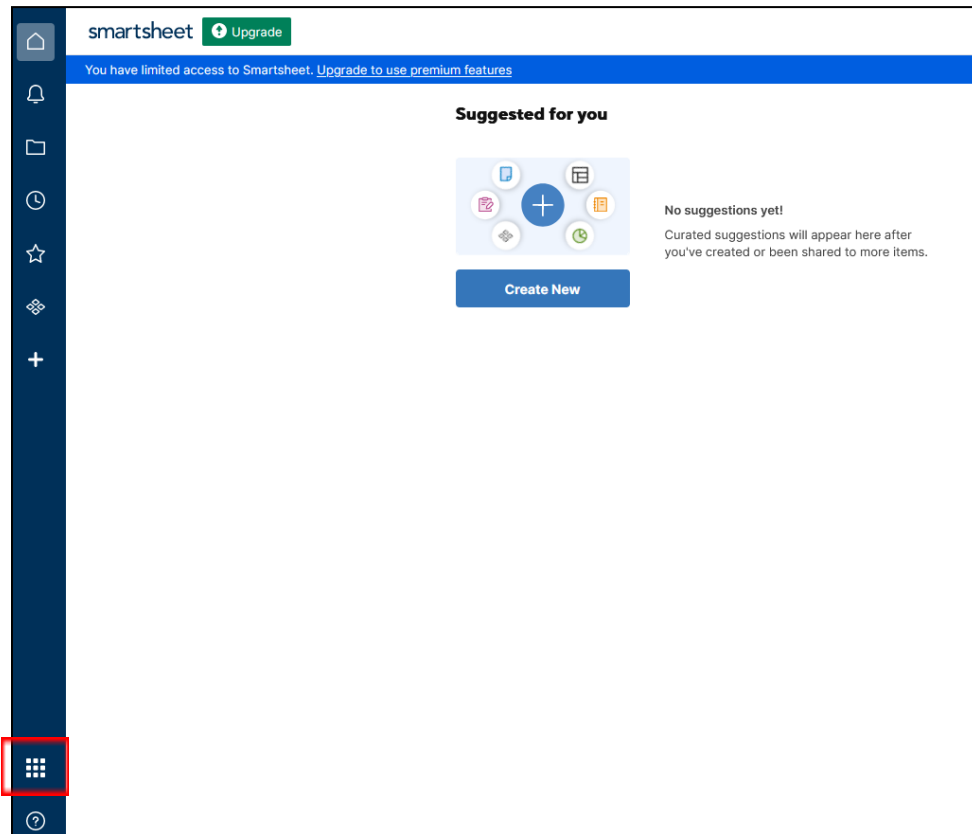
The ability to view a ticket is determined by the email address(s) entered into the UNC Charlotte Email(s) field when filling out the ticket submission form.

You can access Dynamic View either by logging into smartsheet and navigating to Dynamic View from the Home page or by accessing Dynamic View directly using this link <https://dynamicview.smartsheet.com/>

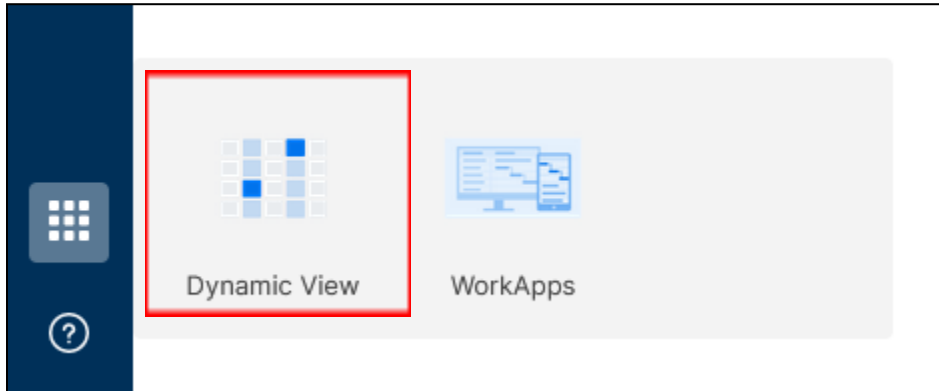
Navigating to Dynamic View from the Smartsheet home page

To access Dynamic View via the Smartsheet Home page:

1. Click on the “Launcher” icon  located on the left hand toolbar of the home page.



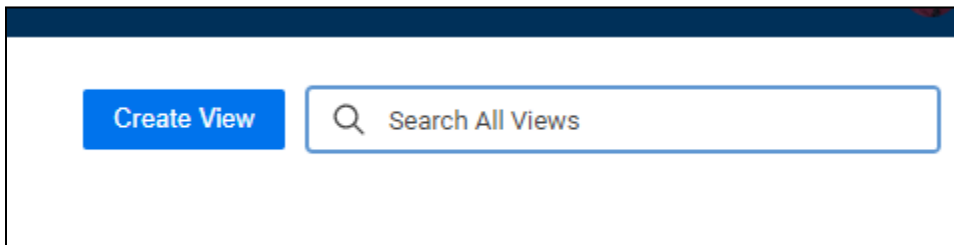
2. Select “Dynamic View” from the menu options



Accessing the “DR - Division of Research Ticket Submissions” View

There are many views in the UNC Charlotte Dynamic View domain. To view your DR tickets you must access the “DR - Division of Research Ticket Submissions” View. To access this view:

1. Search for DR - Division of Research Ticket Submissions in the “Search All Views” box located at the top right of the page



All Views Create View				
Any views that you have access to appear here.				
Name	Owner	My Permission	Last Opened by Me	View Description
DR - Division of Research Ticket Submissions	Michael Braham	Owner	May 11, 2023	This is a list of all tickets you have submitted to the Division of Research. Keep track of status updates, look at co...

2. Clicking on the “DR - Division of Research Ticket Submissions” View will open the view and show all tickets you are associated with.

NOTE: You will only see tickets where your email was included in the UNC Charlotte Email(s) field on the ticket form

Using the DR Ticketing System Dynamic View

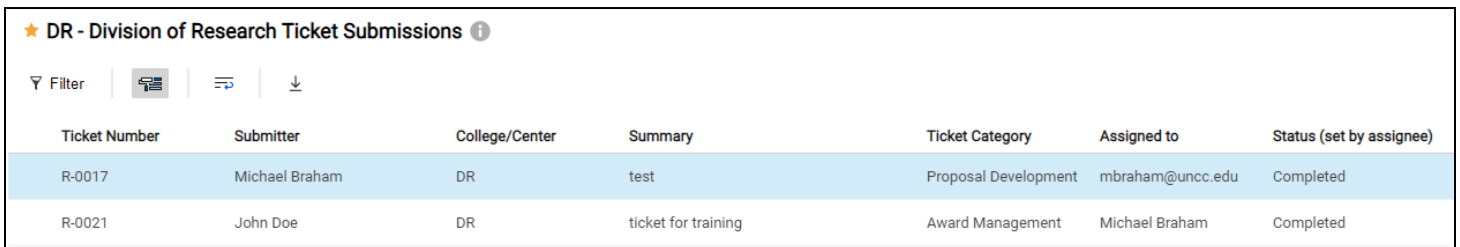
The “DR - Division of Research Ticket Submissions” view allows users to:

- View the status of there tickets
- View who is assigned to thor tickets
- View the information included in their tickets
- Add and reply to comments related to their tickets
- Add and view attachments related to their tickets

Basic Ticket Information

The initial ticket view shows basic information on all your tickets, Such as:

- Submitter Information (Name, Associated College)
- Summary (Ticket Title)
- Ticket Category
- Who the ticket is currently assigned to
- Current Status of the ticket



The screenshot shows the 'DR - Division of Research Ticket Submissions' interface. It features a table with columns for Ticket Number, Submitter, College/Center, Summary, Ticket Category, Assigned to, and Status (set by assignee). Two tickets are listed: R-0017 (Michael Braham, DR, test, Proposal Development, mbraham@uncc.edu, Completed) and R-0021 (John Doe, DR, ticket for training, Award Management, Michael Braham, Completed).

Ticket Number	Submitter	College/Center	Summary	Ticket Category	Assigned to	Status (set by assignee)
R-0017	Michael Braham	DR	test	Proposal Development	mbraham@uncc.edu	Completed
R-0021	John Doe	DR	ticket for training	Award Management	Michael Braham	Completed

Detailed Ticket Information

If you click on a specific ticket an detailed view of the ticket will open on the right side of the page. This detailed view shows some of the same basic information along with other information included with this ticket.

Additional fields show in the detail view include:

- Email associated with the ticket
- Description
- Identified records
- Days in progress

- Date submitted
- Date completed

Details

Data Attachments (0) Comments (0)

Submitter

Michael Braham

Associated UNCC emails

Smartsheet accounts whose email is listed here will be able to view, edit, and communicate on this ticket.

M mbraham@uncc.edu x
P pszanton@uncc.edu x

Summary

Title of ticket

Example Ticket

Description

Detailed description of the issue

This ticket is an example for training purposes.

Ticket Category

Proposal Development x

Proposal Development Topic

Application Preparation and Submission x

Identifier

Record identifier if applicable

NA

Project PI Name

Record PI if applicable

NA

Days in Progress

Number of days this ticket has been in process. Count will stop once ticket is closed/completed.

1

Date submitted

05/01/23

Date completed

MM/dd/yy

Adding Comments to a Ticket

Dynamic View allows the user to add or reply to comments related to their tickets. To interact with comments for a ticket:

1. Access the Detailed view of a ticket by clicking on the desired ticket
2. Choose the “Comments” tab located at the top of the “Details” view



3. Type your comment into the “Add a comment” box at the bottom of the Comments tab



4. Click the blue arrow ➤ to submit your comment

NOTE: All comments will be visible to the user, including internal comments between DR staff.

Adding Attachments to a Ticket

Dynamic View allows the user to add or view attachments related to their tickets. To add or view an attachment:

1. Access the Detailed view of a ticket by clicking on the desired ticket
2. Choose the “Attachments” tab located at the top of the “Details” view



3. To add a new attachment, click on the “Attach a File” button located at the bottom of the attachments tab



4. Choose the file or document you want to attach to the ticket