



FLORIDA
POLYTECHNIC
UNIVERSITY

REQUEST DESK USER'S GUIDE

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OFFICE OF INSTITUTIONAL RESEARCH & EFFECTIVENESS

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1 INTRODUCTION

The OIRE Request Desk User's Guide contains all essential information for the requester/user to make full use of the electronic data/information request system. This manual includes a description of the system and step-by-step procedures for system access and use.

1.1 Purpose and Scope

The purpose of this document is to serve as an instructions guide for internal and external users to how utilize the Florida Polytechnic University (the University) Office of Institutional Research and Effectiveness (OIRE) electronic data request form, also known as Request Desk.

1.2 Organization of User's Guide

The Request Desk User's Guide is organized in three sections: Introduction, Using Request Desk, and Glossary.

Introduction section provides the purpose and scope for both this guide and the Request Desk. In addition, the section includes OIRE point of contacts and discussion of business perspective of the user's and OIRE staff primary responsibilities

Using Request Desk section explains how to access the system, assists users on how to complete and submit the electronic data request form from a desktop and mobile platform, and how to navigate thru the user portal.

Glossary section will provide a definitions for general terms used by OIRE in regard to data requests.

1.3 Points of Contact

If a user were to encounter any difficulty and/or needs technical support with Request Desk, OIRE should be contacted via phone or email. OIRE will respond to any user's technical support within a business day of OIRE being notified by the requester. OIRE staff contact information is as follows:

Name	Role	Email	Phone
Kevin Calkins	Director of OIRE	kcalkins@flpoly.org	863.874.8545
Jhojana Infante	Data Analyst	jinfante@flpoly.org	863.874.8543

Florida Polytechnic IT Helpdesk should not be contact for technical support unless difficulty is related to software installations or computer hardware.

1.4 Business Responsibilities

Both OIRE and users will have responsibilities when using the Request Desk. As stated on the OIRE Operations Manual, data and information requests should be inquired "via the office official electronic request form". Nonetheless, at OIRE staff discretion, any emails and/or phone calls received by the office will be entered onto the Request Desk system as a request/ticket by OIRE staff or the requester will be instructed to do so.

It is the user's responsibility to:

- a. Provide all required, detailed, and necessary information when requesting data and/or information from the office. Instructions on how to provide such information will be describe later in this guide.
- b. Use data/information requested as properly described in the purpose section of the request and any intent of publication inside or outside the University should be notified to OIRE staff.
- c. Notify OIRE staff of any technical issues encountered while using the system.

It is the OIRE staff's responsibility to:

- a. Assigned an agent to work on a specific request. Agent must send a personal response to requester within 24 to 48 hours of assignment.
- b. Update user on the status of the request. Agent must provide all data as it was specified in the request and resolve the data request within three (3) to five (5) business days, depending on data availability and request priority.
- c. Provide all needed technical support. If it is not possible for a request form to be completed electronically due to systems difficulties, OIRE will take data request via phone or email until system issues get resolved.



All communications and requests will be saved and archived by Request Desk system. Those will be available for both parties and can be used for future reference.

2 USING REQUEST DESK

This section explains how to access the system, provides the user with step-by-step instructions on how to complete and submit an electronic request for desktop and mobile users, and how to navigate and manage the user's account through the portal once it is created. Request Desk can be accessed from any internet browser (Internet Explorer, Google Chrome, Safari, or Firefox Mozilla)

2.1 Desktop User

Desktop users can accessed the OIRE Request Desk via the following URL:

<https://floridapolyoire.freshdesk.com/support/login>

There are three (3) way to submit a data request, by simply clicking on "New support ticket" button on the screen, by user sign up, and by user login.

2.1.1 "New support ticket" button

Steps to submit a data request using the "New support ticket" button are:

- 1) Access Request Desk via URL address
<https://floridapolyoire.freshdesk.com/support/login>
- 2) Click "New support ticket" button located in the lower mid-section of the website
- 3) For instructions in completing the request form read section 2.1.4 of this guide or [click here](#)

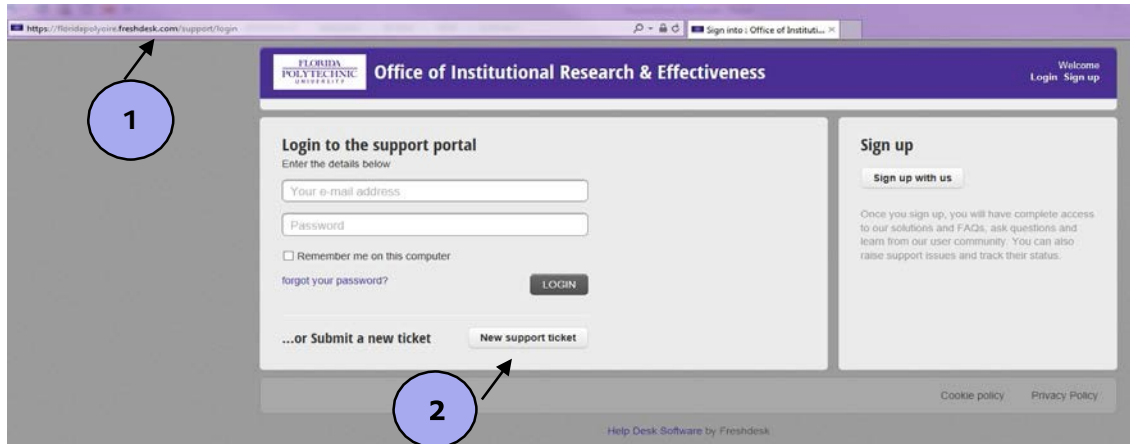


Figure 1: "New support ticket" to submit request

2.1.2 User Sign Up

When a user signs up for OIRE Request Desk, it facilitates tracking of the user's open and/or closed requests, check status of a request, obtain OIRE contact number, and more. Steps to Sign up for OIRE Request Desk and submit a data request are:

- 1) Access Request Desk via URL address
<https://floridapolyoire.freshdesk.com/support/login>
- 2) Click "Sign up with us" button on the right-hand of the screen or "Sign up" link located in the upper right-hand corner of the screen

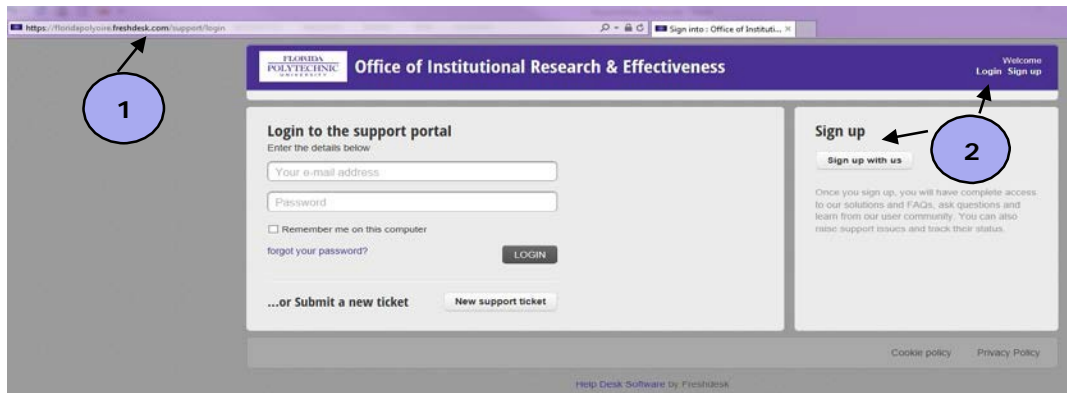


Figure 2: User Sign up option

- 3) In new screen, enter Full Name, email, and authentication code shown (reCAPTCHA picture)
- 4) Click "Register" button

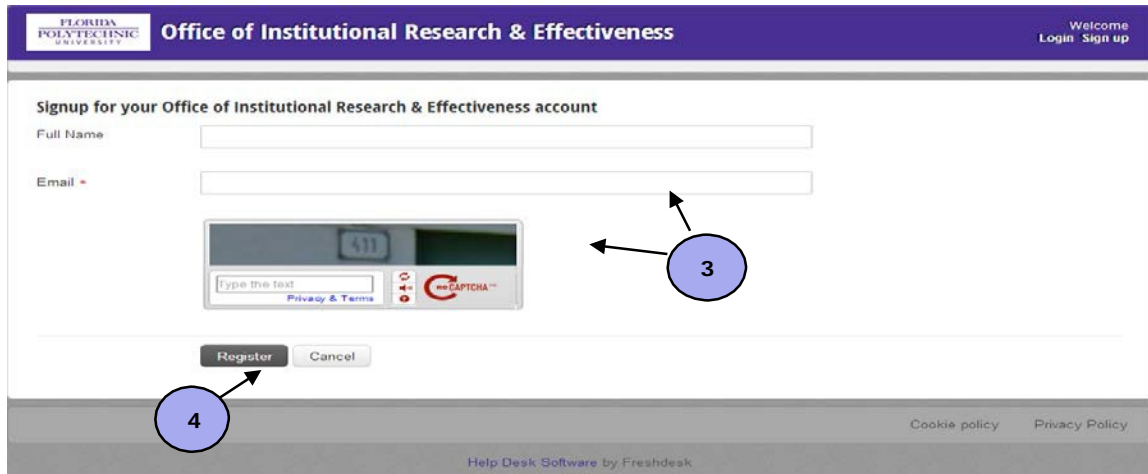


Figure 3: User sign up screen

- 5) Requester will receive an email with instructions to activate the account and select a password
- 6) After clicking on link from email user, a browser screen will open, and user must type Full Name, Password, and Confirm Password
- 7) Click "Activate & login" button

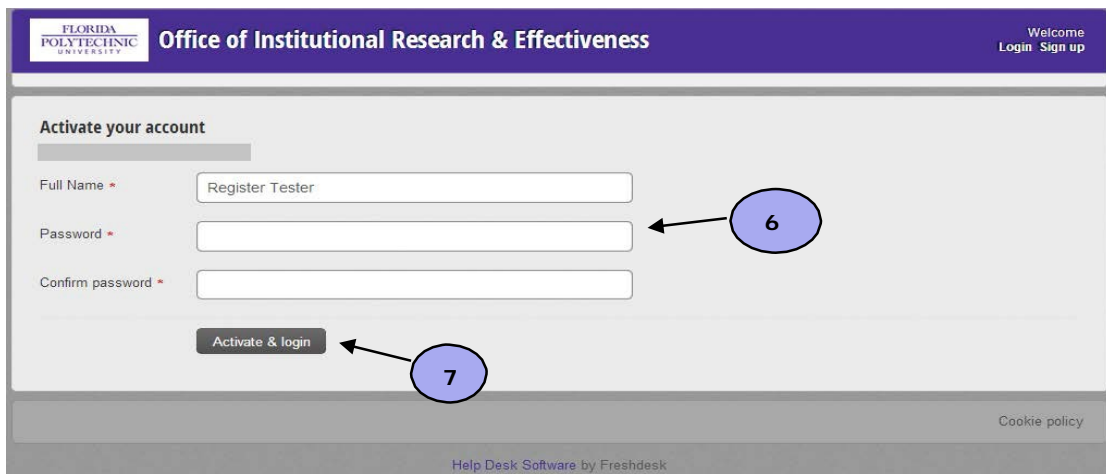


Figure 4: User account activation screen

- 8) In new screen, click "New support ticket" link located in the upper right-side of the website next to "How can we help today?" section
- 9) For instructions in completing the request form read section 2.1.4 of this guide or [click here](#)

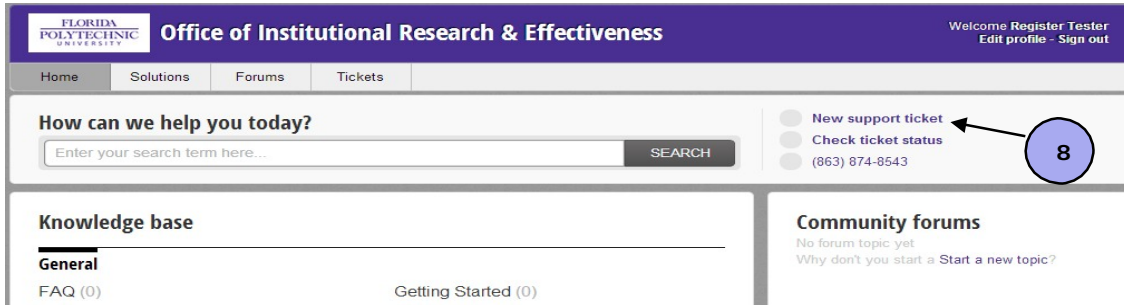


Figure 5: New Request after sign up

2.1.3 User Login

Steps to Login and submit a data request are:

- 1) Access Request Desk via URL address <https://floridapolyoie.freshdesk.com/support/login>
- 2) User must enter email address used for sign up or email address entered when a request has been previously submitted
- 3) Enter password and click on "Login" button

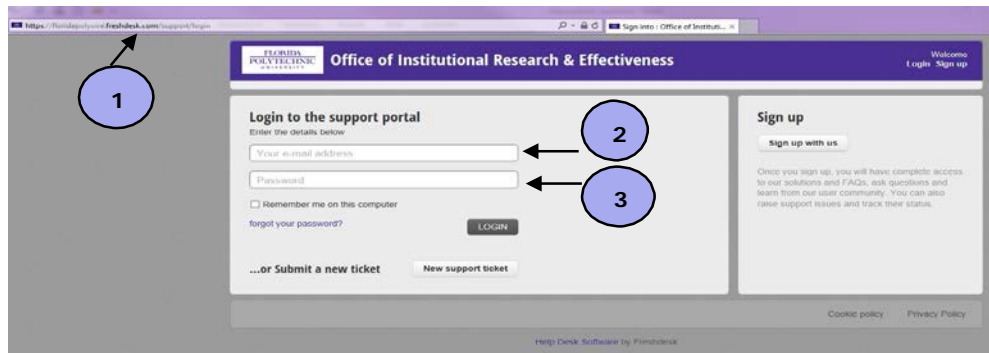


Figure 6: User Login

- 4) In new screen, click "New support ticket" link located in the upper right-side of the website next to "How can we help today?" area

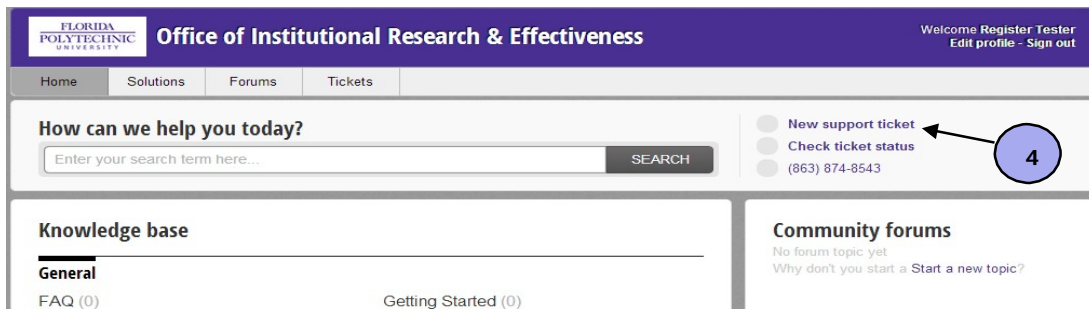


Figure 7: New Request after login

- 5) For instructions in completing the request form read section 2.1.4 of this guide or [click here](#)

- If requester/user forgets password:
- 1) Click on "forgot your password?" link

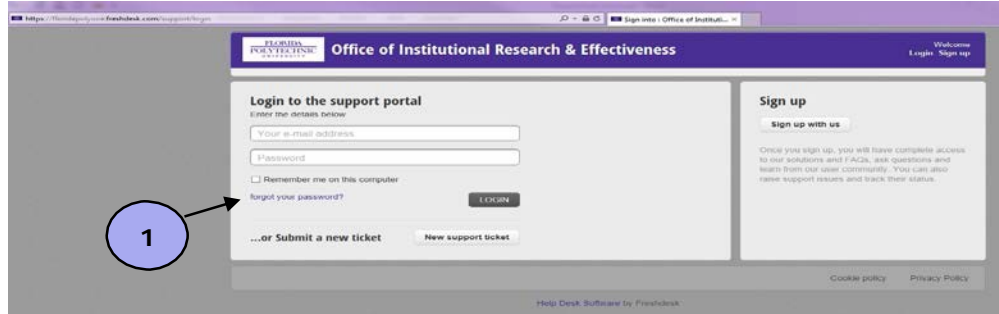


Figure 8: Reset your password link

- 2) Enter email address used for sign up or email address entered when a request has been previously submitted
- 3) Click "Reset my password" button

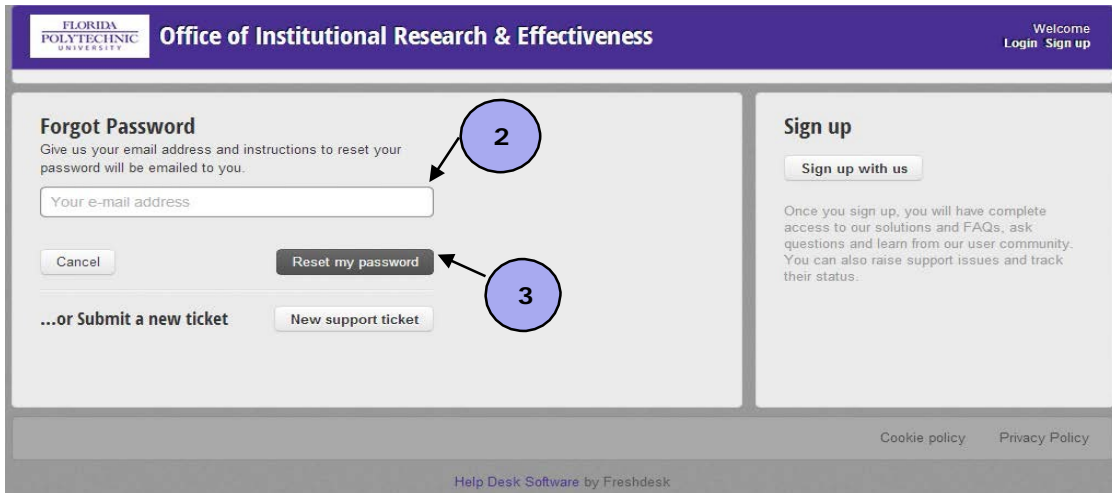


Figure 9: Reset password prompt screen

- 4) Requester/User will receive an email with instructions to reset the account password

2.1.4 Request Form Instructions

Steps to complete and submit an OIRE electronic data request form are:

- 1) Type requester/user's email. For first time requesters, once email address is entered at text box automatically appears to type requester's name
- 2) Type requester/user's department and/or Institution
- 3) Enter requester/user's phone number
- 4) Enter Subject of data/information request. Similar to an email subject line field
- 5) Type date when request is needed by in m/dd/year format (i.e. 8/7/2014)
- 6) Requester **MUST** provide a purpose of why the data/information is being requested. Memo letter and/or additional document(s) can be attached to the request in this area by clicking on "Attach a file" (Mozilla & Chrome) or "Browse" button (Internet Explorer) located below the "Purpose of Data Request" text box.
- 7) Requester **MUST** provide details on what metrics or information is being inquired (i.e. enrollment, retention rates, student to faculty ratio)
- 8) Enter data time period requested. For example, Fall 2014, Academic Year 2014-2015, etc.
- 9) Specify how data must be sorted and/or displayed for request (i.e. student level, residency status, gender, etc.)
- 10) Once request form is completed, click "Submit" button on the lower side of the screen



*Steps 1,2,4,6 and 7 are required to submit a request otherwise requester/user will receive an error and request will not be submitted. Figures 10 and 11 shows steps listed above and required fields captions have a *.*



Request Desk will save any attachment submitted with a request or sent by an OIRE agent when request/ticket gets resolved. Such documents will be available for the user and OIRE agents in future searches. Contact OIRE staff when submitting documents containing confidential or law-protected information.

The screenshot shows the 'Office of Institutional Research & Effectiveness' web page. The main heading is 'Submit a ticket'. The form contains the following fields and callouts:

- 1**: Requester Email & Name * (Email input field)
- 2**: Your Name (input field)
- 3**: Requester Department/Institution * (input field)
- 4**: Phone Number (input field)
- 5**: Subject * (input field)
- 6**: Request Needed by Date: (input field)
- 6**: Purpose of Data Request (i.e. data for proposal, assessment): * (Rich text editor with a toolbar and a text area)
- 7**: Attach a file (link)
- 7**: What Metrics to Include? (i.e. enrollment, admissions, graduation/retention rates) * (input field)
- 8**: Specify data time period (i.e. Fall 2014, academic year 2014-2015) (input field)
- 9**: How should data be displayed/sorted? (i.e. by gender, student level, ethnicity) (input field)

Figure 10: OIRE electronic data request form

This close-up shows the bottom of the form. It features a 'Submit' button and a 'Cancel' button. A callout **10** points to the 'Submit' button. At the bottom of the page, there are links for 'Cookie policy' and 'Privacy Policy', and a footer that reads 'Help Desk Software by Freshdesk'.

Figure 11: Submit electronic data request form

2.2 Mobile User

The system give flexibility for users to submit data request to the University's OIRE from any mobile device (smartphone, iPad, iPod touch, etc.) Screens functionality is the same as in desktop mode and documents can be attached as well.

System access to mobile users is the same as for desktop users, via URL address <https://floridapolyoire.freshdesk.com/support/login>. Similar to desktop users, mobile users can complete a data request form by using "New support ticket" button, sign up, and Login options. Different from desktop screens, login and sign up buttons in the device's screen are located on the upper side of the screen below the site title "Office of Institutional Res..." or as shown in Figure 12.

Electronic data request submission from a mobile device does not differ from Desktop submission either. To read step-by-step instructions of request/ticket submission(s) refer to the previous section (section 2.1) or [click here](#). Figure 13 shows the screen and defines the function for buttons in the upper gray area once user completes login.

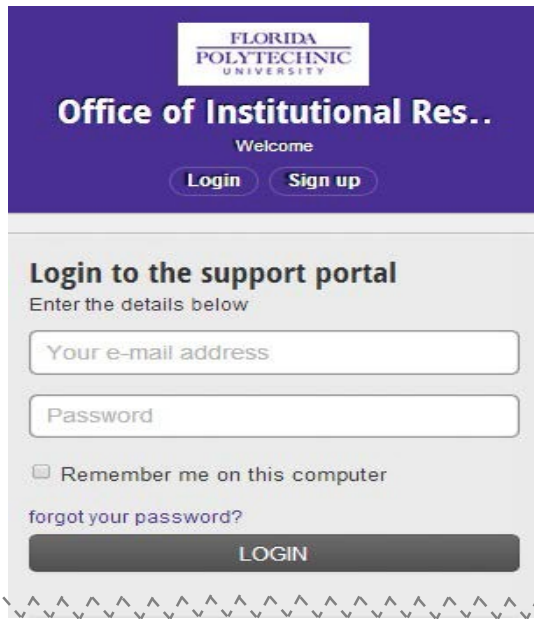


Figure 12: Request Desk mobile screen

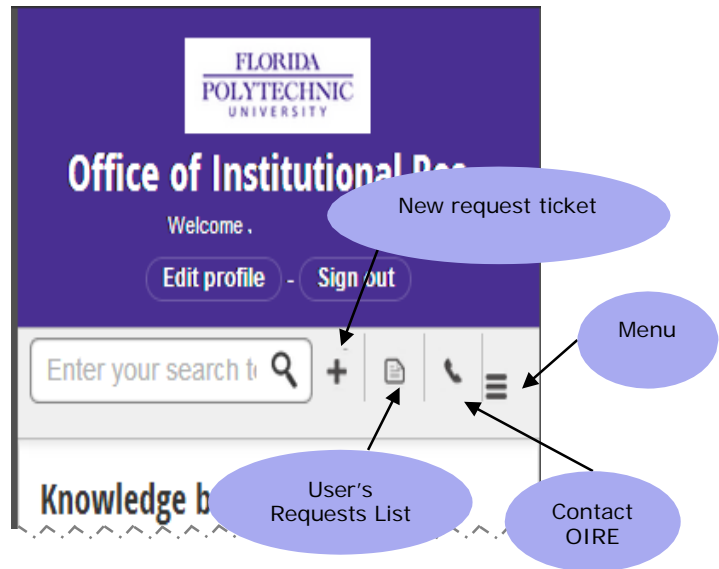


Figure 13: Mobile screen buttons

2.3 Navigating Your Request Desk Account

Creating an account with Request Desk facilitates the user to submit and monitor requests, search previous requests, view documents attached to requests, and communicate to the University OIRE.

The Request Desk portal has three section that allows the user to edit his/her profile, search and monitor requests submitted, submit new data requests, obtain OIRE contact information, and access reference documents and publications. There are three tabs: Home, Solutions, and Tickets. The following sections provides detail on how to manage the user's profile, as well as describes each tab in the portal.



User can search for a specific word, access the data request form, check the status of a request/ticket, and obtain OIRE contact number from any tab selected.



Edit update and sign out link are located at the upper right corner of the screen in all tabs.

2.3.1 Edit Profile

User information can be updated by clicking on "Edit profile" link located on the upper right corner of the screen. User can change the account password in this section. However, to update email address associated with the account the user must submit a request/ticket to OIRE with new information.

A picture can be added to the profile, by simply clicking on the "Choose File" button (on the left side of the screen under "A profile image" area). OIRE does not have a tweeter account, therefore the office does not recommend adding it in the user's profile.

2.3.2 Home & Solutions Tabs

Home and Solutions tabs will contain documents and additional resources that the OIRE will consider informative to all account holders. Examples of documents include this user's guide and Fall Student Profile report.

This area gives the user an opportunity to search for data and information before submitting a ticket. Additional OIRE publications can be found in the office website at <https://floridapolytechnic.org/all-academics/institutional-research-and-effectiveness/>

2.3.3 Tickets Tab

Tickets tab is the section where the user can review all tickets submitted to OIRE via Request Desk and ticket that agents have entered in the system on their behalf. User has the flexibility to select status type of request/tickets to view (all tickets, open, pending, resolved, and closed), as well as sort request/tickets by Date Created, Last Modified, and Status, in an ascending or descending order.

3 GLOSSARY

Agent – OIRE staff member that gets assigned by the office to respond and resolve a data request.

Metric – quantifiable measurement that is used to track and assess the performance of a business or a specific area in the business. It is also defined as a way to determine an organization's behavior.

OIRE (Office of Institutional Research) – Florida Polytechnic University's unit which main purpose is to provide reliable, systematic, and timely information to academic and administrative units in support of the University's policy and decision-making.

Request – Also known as a ticket. Electronic method used by the user to obtain data and/or information from OIRE.

Request Form – it is an electronic form that is filled by the user to request any data and/or information from OIRE. It contains required fields that provides OIRE staff details to consider while responding and resolving to a ticket.

Request/Ticket Status: describes state or position with the Request Desk system of a request previously submitted by a user. There are four request status:

- Open – request that has been submitted by user and agent has not been assigned to request or agent is currently working on the request.
- Pending – request in which the agent is waiting for data and/or information from user or any other internal/external customer.
- Resolved – Agent has completed the request and all information or any report has been sent to the user. The system will automatically change the status of a ticket to "Closed" within 24 hour of agent changing ticket status.
- Closed – Requests that have been completed and resolved.