

Creating an IS Work Order

To submit a support request for Information Systems, create an IS Work through **HSIDB Unity Client**. This can be found on your computer desktop.

Within **HSIDB Unity Client**, click the **HSI CM** tab. This is also where a **Facility Request** can be created. You can now complete the form which will automatically send a notification to the appropriate group.



A blank IS Work Order will open:

A screenshot of a blank IS Work Order form titled '318498 - Review'. The form has a blue header bar with 'Info' and 'Details' tabs. Below the header, there is a 'Summary' section with a 'Short Description of Issue/Request*' field. A callout box points to this field with the text: 'The Short Description field is used to give a brief description of your issue/request.' Below the 'Short Description' field is an 'Emergency' checkbox with the text '(Check this only if your issue is stopping you from doing your job)'. A callout box points to this checkbox with the text: 'The Emergency box should only be checked when you're experiencing an issue that prevents you from completing your job functions or if your request is urgent.' Below the 'Emergency' checkbox is a 'Category*' dropdown menu. The form also has a 'Statement of Work' section with a large text area. The top of the form has a toolbar with various icons for actions like 'Save', 'Add to', 'Refresh', 'Send Email', 'Copy Hyperlink', 'History', 'Documents', 'Compose', 'Upload', 'Discussions', 'Start a Discussion', 'Print', 'Print Preview', and 'Navigation'.

****Please note, all Emergency IS Work Orders are triaged and will receive a response within 5 minutes. When submitting an Emergency IS Work Order, it should be for a situation that requires immediate attention and you are unable to work such as your computer system being down, login issues, or a business impact to the company.****

The screenshot shows the 'IS Work Order' form in a web browser. The title bar indicates '318498 - Review'. The form has a top navigation bar with tabs for 'IS Work Order', 'Tasks', and 'Developer'. Below this is a toolbar with various actions like 'Save and Close', 'Add to', 'Notifications', 'Send Email', 'Copy Hyperlink', 'History', 'Folders', 'Documents', 'Compose', 'Upload', 'Discussions', 'Start a Discussion', 'Print', 'Print Preview', and navigation buttons. The main form area is titled '318498 - Review' and includes a 'Created By: RYAN ASIK' and '5/2/2016 12:52:22 PM' timestamp. The 'Summary' section contains a 'Short Description of Issue/Request*' field with the text 'Application is crashing' and an 'Emergency' checkbox. The 'Category*' dropdown menu is open, showing options: 'My Hardware/Software/Network', 'Enterprise Solutions', 'Telco / Mobile Devices & MiFi', and 'Security'. Two callout boxes provide additional information: one points to the 'Category*' dropdown stating 'The Category field is used to direct your Work Order to the correct team within IS.', and another lists the categories: 'Hardware/Software/Network' (includes PC and Software issues), 'Enterprise Solutions' (includes specific Internal Systems), 'Telco/Mobile Devices & MiFi' (includes issues with cellular devices), and 'Security' (includes Security applications and incidents).

IS Work Order Tasks Developer 318498 - Review

Save Save and Close Add to Notifications Send Email Copy Hyperlink History Folders Documents Compose Upload Discussions Start a Discussion Print Print Preview First Object Previous Object Next Object Last Object

Info Details 318498 - Review Created By: RYAN ASIK 5/2/2016 12:52:22 PM

Summary

Short Description of Issue/Request*

Application is crashing

☐ Emergency (Check this only if your issue is stopping you from doing your job)

Category*

My Hardware/Software/Network
Enterprise Solutions
Telco / Mobile Devices & MiFi
Security
< None >

The Category field is used to direct your Work Order to the correct team within IS.

Hardware/Software/Network – includes PC and Software issues as well as other hardware used within Hyland

Enterprise Solutions – includes specific Internal Systems used within Hyland *Note: You will need to pick a subsystem*

Telco/Mobile Devices & MiFi – includes issues being experience with desk phones, mobile phones and other cellular devices

Security – includes issues specific to Security applications as well as Security incidents

It is important that the proper **Category** and **System** be selected so that the correct group is engaged in your request. For general PC or Application issues, always choose **Hardware/Software/Network**. For Telco issues, choose the **Phones/Mobile Devices & MiFi** system. For issues relating to **HSIDB**, choose **Enterprise Solutions** under **Category** and **HSIDB** under **System**.

The screenshot shows the 'System' dropdown menu in the 'IS Work Order' form. The 'Category*' dropdown is set to 'Enterprise Solutions'. The 'System (Optional: Please select the system if you know it)' dropdown is open, showing a list of systems: '< None >', 'HSIDB', 'Database Reports', 'RSS', 'Online Opportunity Management', 'Online Quote and Order', 'Mindshare', 'SharePoint', and 'Concur'.

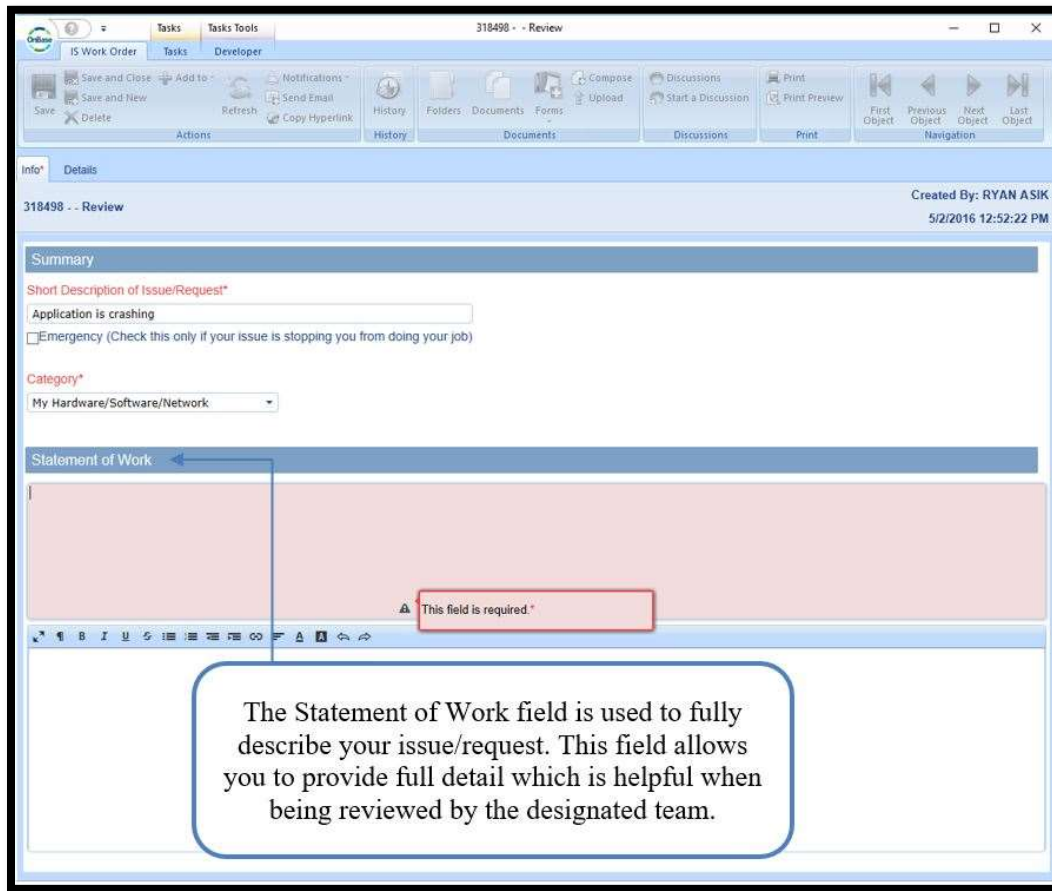
Category*

Enterprise Solutions

System (Optional: Please select the system if you know it)

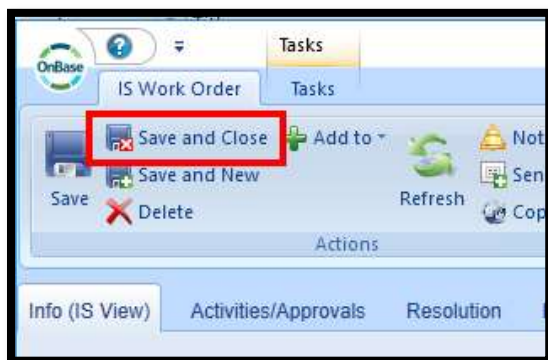
< None >
HSIDB
Database Reports
RSS
Online Opportunity Management
Online Quote and Order
Mindshare
SharePoint
Concur

The **Statement of Work** should contain as much information as you can provide on the issue you are having. The more description, the more effectively a resolution can be found.



The screenshot shows the OnBase IS Work Order form in 'Review' mode. The form has a top navigation bar with 'Tasks' and 'Tasks Tools' tabs. Below this is a toolbar with various icons for actions like 'Save and Close', 'Save and New', 'Delete', 'Refresh', 'Send Email', 'Copy Hyperlink', 'History', 'Folders', 'Documents', 'Forms', 'Upload', 'Compose', 'Discussions', 'Start a Discussion', 'Print', 'Print Preview', and 'Navigation'. The main form area is divided into sections: 'Info' (showing '318498 - Review' and 'Created By: RYAN ASIK' on '5/2/2016 12:52:22 PM'), 'Details', 'Summary', and 'Statement of Work'. The 'Summary' section contains a 'Short Description of Issue/Request*' field with the text 'Application is crashing', an 'Emergency' checkbox, and a 'Category*' dropdown menu set to 'My Hardware/Software/Network'. The 'Statement of Work' section is a large text area with a red border and a red error message 'This field is required.*' at the bottom. A callout box points to this field with the text: 'The Statement of Work field is used to fully describe your issue/request. This field allows you to provide full detail which is helpful when being reviewed by the designated team.'

Once you have completed all fields of the IS Work Order, click **Save and Close**, which will create the IS Work Order within HSIDB. *The information entered will not be saved until clicking **Save and Close**.*



The screenshot shows the OnBase IS Work Order form in 'Review' mode. The 'Save and Close' button is highlighted with a red rectangle. The button is located in the 'Actions' section of the form, which also includes 'Save and New', 'Save', and 'Delete' buttons. The 'Info (IS View)' tab is selected at the bottom of the form.

The IS Work Order form will close and you will receive an email notification to your Hyland email confirming your Work Order has been created along with who is assigned to it.

If you are unable to access **HSIDB Unity Client** to create an IS Work Order, email helpdesk@onbase.com

To view your submitted IS Work Orders, see [Find my IS Work Order](#)