

MAST Training: Job Aid

Create a New Request



Objective

To provide users with steps on how to submit general SSD requests in MAST.



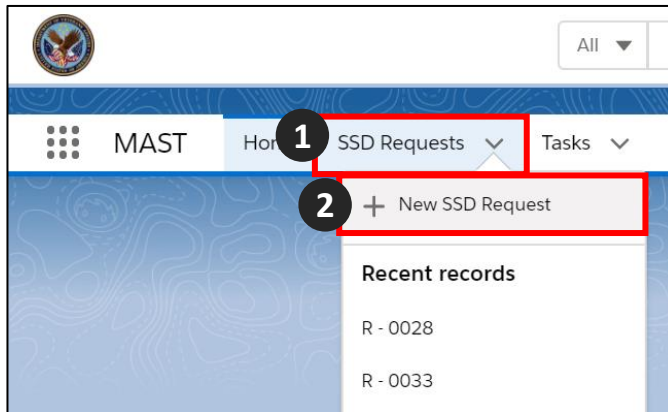
Audience

User: Requestor, Supervisor, Employee, Facilities Manager

Instructions

Pre-Step: Access the **MAST** Homepage via <https://va.my.salesforce.com/>

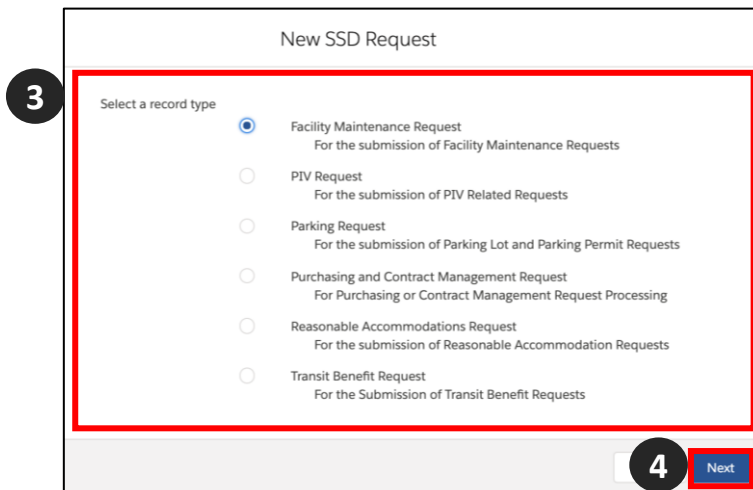
1. Click on the **dropdown arrow** to the right of the **SSD Requests tab**.
2. Select **New SSD Request**.



3. Select the **Type of Request** (*Facility Maintenance, Purchasing, etc.*) from the pop-up listing.

Note: RMO (Records Management Officer), Security, and Safety requests can only be created/viewed by Supervisor and SSD Employee.

4. Click **Next**.



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5. Fill out the **required information** on the request form under the General Request Information.

Note: Information fields will vary depending on request type, however any field marked with a red * is a required field that will need to be completed prior to submitting the request.

- a. **Station:** Select the station for the request.
- b. **Sub-Category:** Select the specific category the request falls under (This will vary for each type of request).
- c. **Description:** Fill out this free form field with any other additional information that adds further detail to the request.
- d. **Facility:** Type in the facility name to search for the facility, or click **Enter** to pull up the list of facilities that match the search words entered. User must select the appropriate facility that the request pertains to.
- e. **Severity Level:** Select the severity level from the drop down that corresponds with the need of the request (Low, Medium, High).
- f. **Comments:** Fill out the free form field with any additional comments the user would like to attach to the request. (Optional)

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General Request Information

* Station --None--	* Facility Search SSD Facilities... <input type="text"/>
Record Type Parking Request	* Sub-Category --None--
* Description <input type="text"/>	Comments <input type="text"/>
* Severity Level --None--	

Note: For all requests other than RMO or Reasonable Accommodations, [skip to step 8](#).

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6. **RMO Requests: Fill out** the required information under the **Processing Information Section** for RMO requests
 - a. **Status:** User selects a status from the dropdown.
 - b. **Sub-Status:** User selects a sub-status from the dropdown.
 - c. **PRAD (Privacy and Records Assessment Division) Sub-Task: Select** the appropriate sub-task from the listed options in the left side box under **“Available”**. **Click the right arrow** to choose the desired sub-task. **Click the left arrow** to remove the selection.
 - d. **PRAD (Privacy and Records Assessment Division) Checklist Sub-Task: Select** the appropriate sub-task from the listed options in the left side box under **“Available”**. **Click the right arrow** to choose the desired sub-task. **Click the left arrow** to remove the selection.

Note: The other fields in the Processing Information section are entered when completing an RMO request.

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Processing Information

Assigned To _____ Due Date _____

Status: View all dependencies

Sub-Status: View all dependencies

*** PRAD Sub-Task**

Available	Chosen
Contracting	
Electronic Records	
File Plan & Inventory	
Records Disposition	
Records Liaisons	

*** PRAD Checklist Sub-Task**

Available	Chosen
Has the facility desi...	
Is the Records Man...	
Are workforce mem...	
Has the facility desi...	
Does facility Manag...	

PRAD Sub-Task Other Comments:

Number of Employees Trained:

Workspace Inspection Number:

Number of Desk Reviews:

Number of Bins Shredded:

Related Work Order:

7. **Reasonable Accommodations Requests:** The **Date Required** and **Desired Locations** fields under the General Request Information section are required when creating this request type.

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* Date Required By:

* Desired Location:

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8. Fill out the **requestor information** on the request form. If the person impacted is same as the requestor, **Check** the **Person Impacted is Same as Requester** box.

Requester Information

Person Impacted is Same as Requester

* Requester Name
Search People...

* Requester Phone

* Requester Email

Person Impacted Name

Person Impacted Phone

Person Impacted Email

9. Select **Submitted** in the drop-down menu under processing information section of the request.
10. Click **Save** to save request as submitted. This will change the status from a draft request to a submitted request, populate a submitted date, and enter the request into the appropriate queue for assignment and processing.

Processing Information

--None--

✓ Draft

Draft - More Information Needed

Submitted

Assigned

Returned

Closed

Assigned Date

Referred Date

Closed Date

Cancel Save & M Save

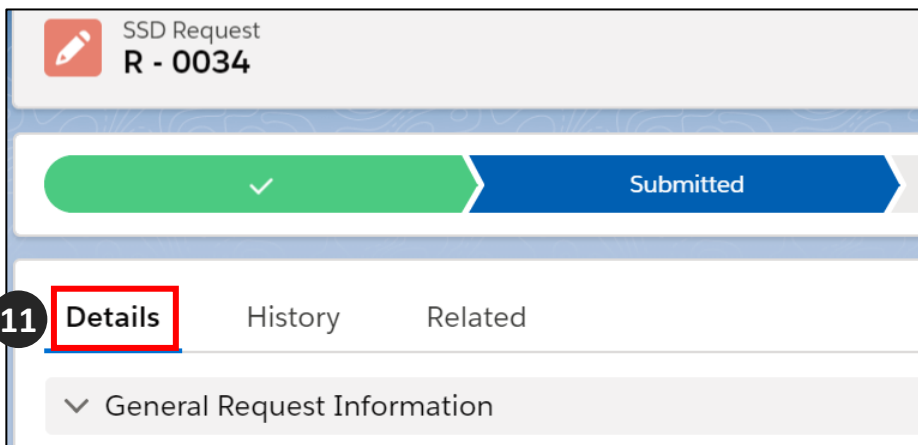
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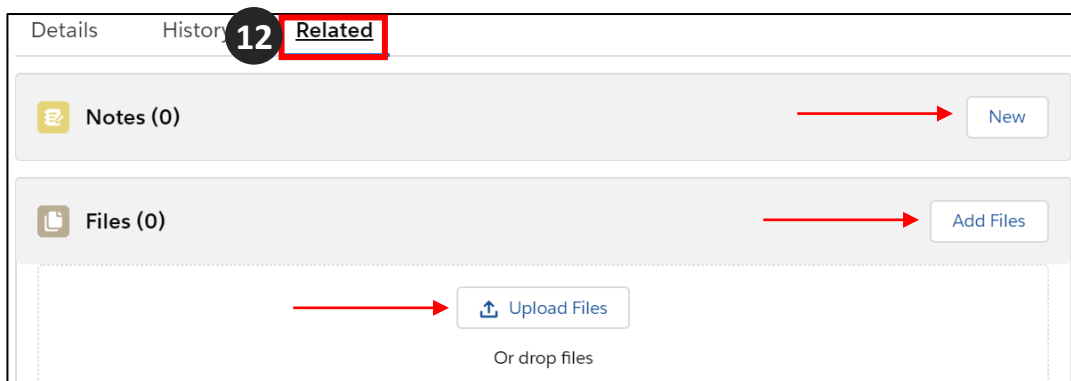
Note: If required fields have not been filled out, the user will receive a banner message stating that errors exist on the page. Fields requiring the user's attention will be listed under the banner and highlighted in red.

Note: If required, user can **Select Draft** in the drop-down menu under processing information section of the request and then **Click Save** to save the request as a draft without submission.

11. Click on the **Details tab** of the request to review the details of the request. (this is an optional step)



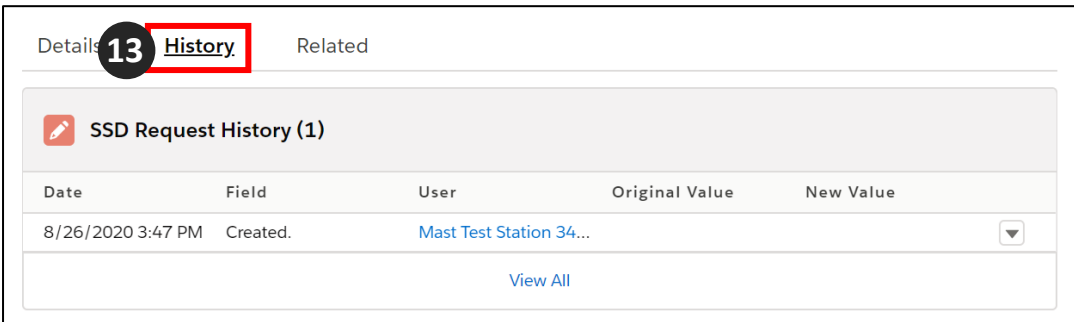
12. Select the **Related** tab to add documents and/or additional notes. (this is an optional step)
 - a. Select **New** to add notes. Write required notes in the pop-up field.
 - b. Select **Done** when finished entering in note text.
 - c. Select **Upload Files** to upload any required files into the request.
 - d. Select **Add Files** when finished uploading files into the request.



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13. Click on the **History** tab to see all previous actions taken on the request. (this is an optional step)



The screenshot shows a web interface with three tabs: 'Details', 'History', and 'Related'. The 'History' tab is selected and highlighted with a red box. Below the tabs is a section titled 'SSD Request History (1)' with a pencil icon. Underneath is a table with the following columns: Date, Field, User, Original Value, and New Value. A single row of data is visible, and a 'View All' link is at the bottom.

Date	Field	User	Original Value	New Value
8/26/2020 3:47 PM	Created.	Mast Test Station 34...		

Post-Step: There are 3 potential post steps:

- (1) Post Step 1: Requester can view currently submitted requests. *(Covered in View Request Status job aid)*
- (2) Post Step 2: Supervisors can review/assign requests to employees. *(Covered in View and Assign Pending Requests job aid).*
- (3) Post Step 3: Employees that are assigned the submitted request can process said requests. *(Covered in View, Manage and Complete all Assigned Requests)*

✓ You have completed creating a new request in MAST!