

MAST Training: Job Aid

View, Manage, and Complete All Assigned Requests



Objective

To provide steps for employees on how to view, manage, and complete all assigned requests in their queue.



Audience

SSD Employee

Instructions

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

1. Select **SSD Requests** tab located on the MAST Dashboard at the top of the page.
2. Select the **drop-down arrow** on top left-hand side of the SSD Requests dashboard window to view the filters in the list view.
3. Select the **My Assigned Requests** filter in the list view options.

The screenshot shows the MAST dashboard interface. At the top, there is a navigation bar with the MAST logo and several tabs: 'SSD Requests', 'SSD Facilities', 'SSD Mail Trackings', and 'Reports'. The 'SSD Requests' tab is highlighted with a red box and a circled '1'. Below the navigation bar, the main content area is titled 'SSD Requests' and 'My Assigned Requests'. A dropdown arrow is highlighted with a red box and a circled '2'. The dropdown menu is open, showing a search bar and a list of filter options. The 'My Assigned Requests' option is highlighted with a red box and a circled '3'. The list of filter options includes: 'All', 'All Unassigned Requests', 'My Assigned Requests', 'My Closed Requests', 'My Submitted Requests', and 'Recently Viewed (Pinned list)'. Below this, there is a section for 'ALL OTHER LISTS' with options: 'All Closed Requests', 'All On Hold / Referred Requests', 'Assigned / In Progress Requests', and 'Facility Management Requests'.



MAST Training: Job Aid

View, Manage, and Complete All Assigned Requests

4. To **organize** the populated **requests** by numerical and alphabetical order, **click** on the column headers across the top of the requests section.

A. Ex. Clicking on the “Record Type” column header will organize the record types by alphabetical and numerical order.

Note: You may also search for the specific SSD Request by typing in the SSD Request # in the search bar at the top right-hand corner of the screen.

5. **Click** the desired **SSD Request** from the “SSD Request #” column.

Note: Review the information in the request.

SSD Request # ↑	Assigned To	Record Type	Title	Description	Sub-Category	Facility	Severity Level	Status	Due Date	Comments	Clone
1 R - 0159	Mast Test Station 34...	Facility Maintenance...		test	Carpeting	Las Cruces	Medium	Assigned	9/10/2020		Clone
2 R - 0160	Mast Test Station 34...	Facility Maintenance...		test	Facility Lighting	Las Cruces	Medium	Assigned	9/10/2020	test	Clone
3 R - 0161	Mast Test Station 34...	PIV Request		test	PIV Issuance	Las Cruces	Medium	Assigned	9/4/2020		Clone
4 R - 0173	Mast Test Station 34...	Facility Maintenance...		Electrical	Equipment install/r...	Las Cruces	Medium	Assigned	9/15/2020		Clone
5 R - 0174	Mast Test Station 34...	Facility Maintenance...		test	Carpeting	Las Cruces	Medium	Assigned	9/11/2020		Clone
6 R - 0178	Mast Test Station 34...	Facility Maintenance...		Electrical	Equipment install/r...	Las Cruces	Medium	Assigned	9/15/2020		Clone
7 R - 0179	Mast Test Station 34...	Facility Maintenance...		Test	Carpeting	Test Station	Medium	Assigned	9/11/2020		Clone

For Transit Benefit Requests

6. **Click** on the grey **pencil icon** next to the “Debit Card Number/Smart Card Number” field under the Processing Information section.

Processing Information

Assigned To	Due Date
Mast Test Station 340 Employee	9/24/2020
Status	Sub-Status
Assigned	Pending
Transit Sub-Status	
Debit Card Number/Smart Card Number	Debit Card Expiration
Comments to Requester	Related Work Order

MAST Training: Job Aid

View, Manage, and Complete All Assigned Requests

Fill out the following additional information under the **Transit Benefits Request Information** section.

Note: These fields are not available to requestors to view.

7. **Update** the **Status** field under the Processing Information section to **“Closed”**.
8. **Update** the **“Transit Sub-status”** field with the desired transit sub-status *(if applicable)*
9. **Input** the last 4 digits of the debit/credit card in the **“Debit Card Number/Smart Card Number”** field *(if applicable)*
10. **Update** the **“Debit Card Expiration”** field with the pop-up calendar *(if applicable)*
11. **Enter** in any comments the user would like to provide to the requester in the free text **Comments to Requestor** field.
12. **Click** inside the **Related Work Order** field to display a pre-populated list of existing work orders. User can alternatively enter in a request number to automatically search for a specific work order.
13. **Click Save** to save any changes and updates.

Note: Update any fields if applicable.

The screenshot shows the 'Processing Information' section of a form. A red box highlights the fields corresponding to steps 7 through 12. Step 7 points to the 'Status' dropdown menu, which is currently set to 'Assigned'. Step 8 points to the 'Sub-Status' dropdown menu, currently set to 'Pending'. Step 9 points to the 'Transit Sub-Status' dropdown menu, currently set to '--None--'. Step 10 points to the 'Debit Card Expiration' field, which includes a calendar icon. Step 11 points to the 'Comments to Requestor' text area. Step 12 points to the 'Related Work Order' search field, which contains the placeholder text 'Search SSD Requests...'. Step 13 points to the 'Save' button at the bottom of the form. Other visible fields include 'Assigned To' (Mast Test Station 340 Employee) and 'Due Date' (9/24/2020).

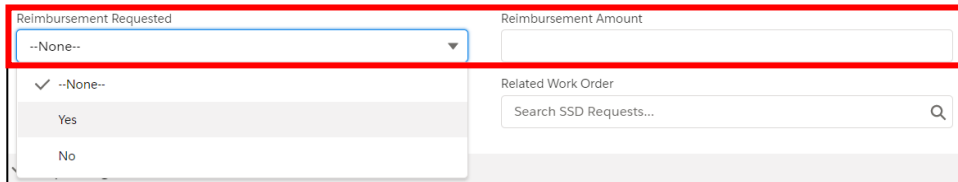
MAST Training: Job Aid

View, Manage, and Complete All Assigned Requests

For **Reasonable Accommodations Request**

14. Enter on information in the **Reimbursement Requested** or **Reimbursement Amount** fields under the Processing Information section.

14



Reimbursement Requested	Reimbursement Amount
--None--	
✓ --None--	Related Work Order
Yes	Search SSD Requests...
No	

For **Purchasing and Contract Management Request**

15. Enter on information in the **Sub-Task** field under the Processing Information section.

15

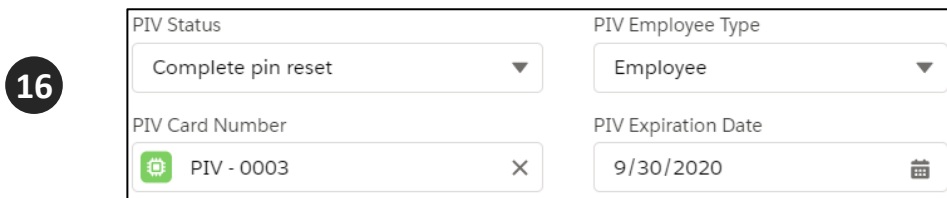


Sub-Tasks
Micro-purchase (Under \$10,000)

For **PIV Requests**

16. Enter on information in the **PIV Status, PIV Employee Type, PIV Card Number, and PIV Expiration Date** field under the Processing Information section.

16



PIV Status	PIV Employee Type
Complete pin reset	Employee
PIV Card Number	PIV Expiration Date
PIV - 0003	9/30/2020

MAST Training: Job Aid

View, Manage, and Complete All Assigned Requests

For **RMO Services Requests**

17. Click on the grey **pencil icon** next to the **“PRAD Sub-Task”** field under the Processing Information section.

Processing Information	
Assigned To Mast Test Station 340 Supervisor	Due Date 9/30/2020
Status Returned	Sub-Status
PRAD Sub-Task Contracting	PRAD Checklist Sub-Task Has the facility designated a Records Manager in writing
PRAD Sub-Task Other Comments	
Number of Employees Trained 0	Workspace Inspection Number 0
Number of Desk Reviews 0	Number of Bins Shredded 0
	Related Work Order

18. Update the **“PRAD Sub-Task”** (Privacy and Records Assessment Division) and **“PRAD Checklist Sub-Task”** items from available to chosen.

A. Ex. **Select** **“Contracting”** in the Available section then use the **right facing arrow** to move it to the Chosen section.

19. Update the **“PRAD Sub-Task Other Comments”** field with any related comments.

20. Update the **“Number of Employees Trained,” “Number of Bins Shredded,” “Number of Desk Reviews,”** and **“Work Inspection Number”** fields with the applicable numbers.

21. Update the **“Related Work Order”** field with the designated SSD Request.

Processing Information	
Assigned To Mast Test Station 340 Supervisor	Due Date 9/30/2020
Status Returned	Sub-Status --None--
View all dependencies	
* PRAD Sub-Task Available Electronic Records File Plan & Inventory Records Disposition Records Liaisons Records Maintenance and Storage	Chosen Contracting
PRAD Sub-Task Other Comments	* PRAD Checklist Sub-Task Available Is the Records Manager a membe... Are workforce members who hav... Has the facility designated an alte... Does facility Management Leader... Does the Records Manager or all...
Number of Employees Trained 0	Workspace Inspection Number 0
Number of Desk Reviews 0	Number of Bins Shredded 0
	Related Work Order Search SSD Requests...

MAST Training: Job Aid

View, Manage, and Complete All Assigned Requests

22. Update the **Status** field under the Processing Information section to “**Closed**”.

23. Update the “**Related Work Order**” field.

24. Click **Save** to save any changes and updates.

Note: Update any fields if applicable

Processing Information

Assigned To: Mast Test Station 340 Employee

Due Date: 9/17/2020

Status: Closed (22)

Sub-Status: --None--

Related Work Order: Search SSD Requests... (23)

Save (24)

25. Update the **Status** field under the Processing Information section to “**Closed**”.

26. Click the **save icon** to save any changes and updates.

Note: Update any fields if applicable.

Processing Information

Assigned To: Mast Test Station 340 Supervisor

Due Date: 9/30/2020

Status: Closed (25)

Sub-Status: --None--

Save (26)

Note: For all other requests, fill out any applicable or required fields and update the status field to closed.

✓ You have completed viewing, managing, and completing all assigned requests in MAST!