



IT
DIRECT™

ITDirect™
User Manual
Requester

Version 2.0
SchoolDude.com, Inc.

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Requester Guidelines

I. So You're a Requester! Now What? (Getting started with MySchoolBuilding.com.)

MySchoolbuilding.com is where you as a Requester will go to make all of your new incident requests. There are two ways that a Requester can be entered into the system:

- The ITDirect Administrator can add the Requester into the system.
- The Requester can add their self into the system.

If you are a new Requester (you haven't been entered into the system before), follow these steps to set up your Requester name and enter yourself into the system:

1. Go to www.myschoolbuilding.com.
2. You will see the following page:

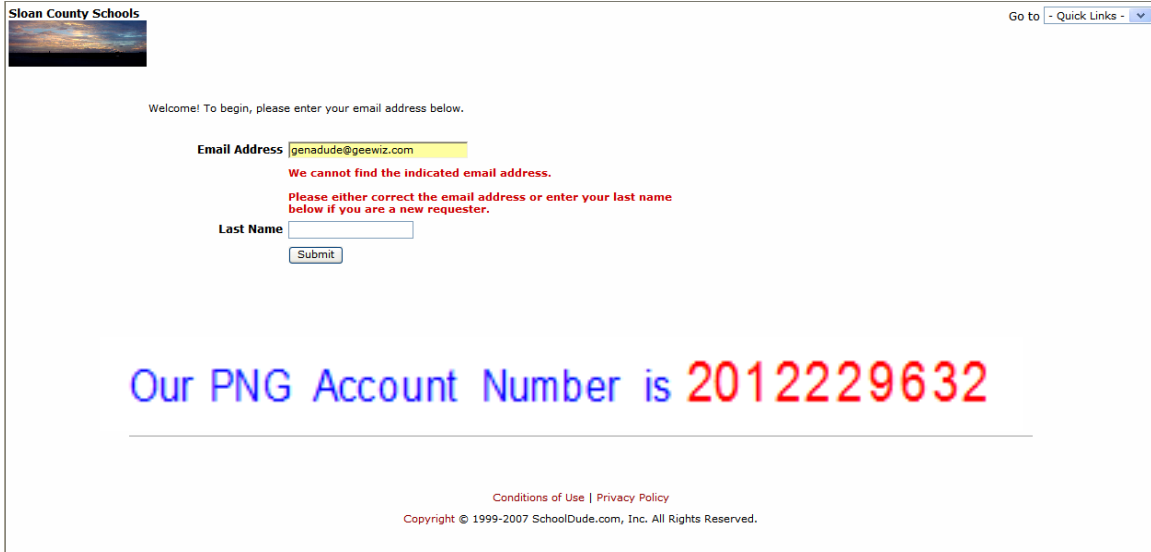


The screenshot shows the login page for Sloan County Schools. In the top left corner, there is a logo for Sloan County Schools. In the top right corner, there is a blue button labeled 'MD LOGIN'. The main content area contains the text 'Welcome! To begin, please enter your email address below.' followed by a label 'Email Address' and a yellow input field. Below the input field is a 'Submit' button. At the bottom of the page, there are links for 'Conditions of Use' and 'Privacy Policy'.

This is the MySchoolBuilding.com login page for your educational facility. You will see your facility's name and/or logo in the top left-hand corner and the words "MD Login" in the top right. See below:

3. Enter your **email address** in the space provided.
4. Click **Submit**.

5. As you are a new Requester, you will then see the following page:



Sloan County Schools

Go to [Quick Links](#)

Welcome! To begin, please enter your email address below.

Email Address

We cannot find the indicated email address.
Please either correct the email address or enter your last name below if you are a new requester.

Last Name

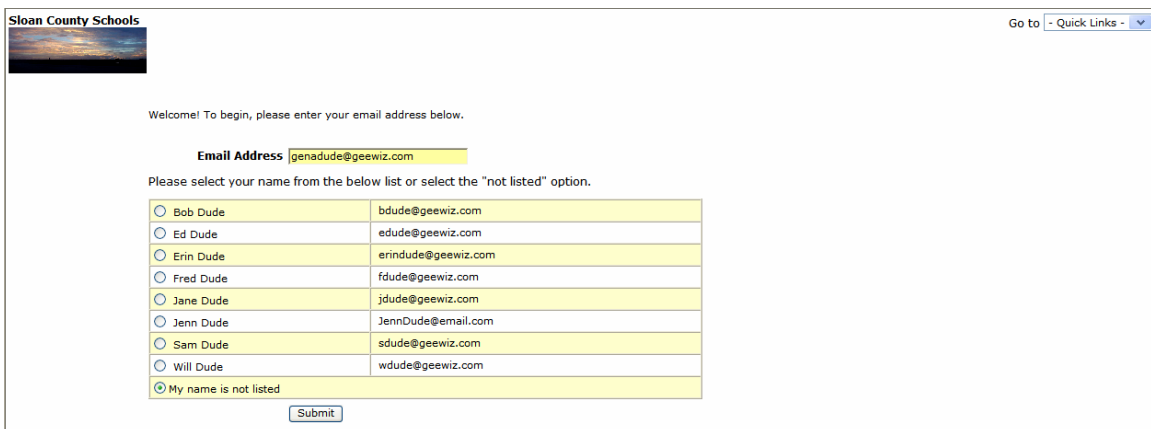
Our PNG Account Number is 2012229632

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SCHOOLDUDE SAYS: If this page doesn't come up when you enter your email address and you see an entirely different page with the word "Welcome" at the top, followed by a form with some of your info already in it, skip ahead to step 14.

6. Enter your **last name** into the box provided.
7. Click **Submit**.
8. Next, you should see the page below:



Sloan County Schools

Go to [Quick Links](#)

Welcome! To begin, please enter your email address below.

Email Address

Please select your name from the below list or select the "not listed" option.

<input type="radio"/> Bob Dude	bdude@geewiz.com
<input type="radio"/> Ed Dude	edude@geewiz.com
<input type="radio"/> Erin Dude	erindude@geewiz.com
<input type="radio"/> Fred Dude	fdude@geewiz.com
<input type="radio"/> Jane Dude	jdude@geewiz.com
<input type="radio"/> Jenn Dude	JennDude@email.com
<input type="radio"/> Sam Dude	sdude@geewiz.com
<input type="radio"/> Will Dude	wdude@geewiz.com
<input checked="" type="radio"/> My name is not listed	

9. Your email address should already be entered into the box provided. If it's not correct, however, enter it correctly. Make sure that the circle next to "My name is not listed" has been clicked and contains a green dot.
10. Click **Submit**.
11. The page you see next should look something like this:

The screenshot shows a web browser window with the title "Sloan County Schools" and a "Go to - Quick Links -" dropdown menu. Below the header, there is a red checkmark icon followed by the text "Indicates required information." The form contains the following fields:

- First Name** (required): Input field containing "Bob".
- Last Name** (required): Input field containing "Dude".
- Email Address** (required): Input field containing "genadude@geewiz.com".
- Phone Number**: Input field containing "919-555-9999".
- Cellular Phone**: Input field containing "919-555-8888".
- Pager**: Empty input field.

A "Submit" button is located at the bottom of the form.

12. Your last name and email address should already be filled in. Fill in the remaining fields (first name is the only one required) if you wish.
13. Click **Submit**.
14. The next page you are taken to should look something like this (see next page):

Sloan County Schools Go to - Quick Links - LOGOUT HELP

Work Request Schedule Request Inventory Request Trip Request My Requests Settings Help

ASSIGNMENT SEARCH KNOWLEDGE BASE HELP

Welcome

To submit your request complete the following form.

Indicates required information.

Step 1 Please be yourself, click here if you are not Gena Dude


First Name	Last Name	Email
gena	Dude	genadude@geewiz.com
Phone	Pager	Cellular Phone
919-555-8282		919-555-3221

Step 2 Location

-- Select Location --
Area -- Select Area -- **Area/Room Number**


Yes, remember my area entries for my next new request entry.

Step 3 Select Problem Type:



Maintenance Help Desk

OR



Technology Help Desk

Maintenance Help Desk:
 Click here for Maintenance Emergency Contacts
 Click on the problem type below that best describes your issue.

Athletic Fields	Audio/Visual	Cafeteria	Carpentry
Climate Control	Custodial	Electrical	Food Services
Heating/Ventilation /Air Conditioning	Lighting	Office Supplies	Plumbing
Windows			

Maintenance Emergency
 Check here if this is an emergency or call any of the emergency contacts below.

Contact Name	Contact Phone
No contacts listed.	

Technology Help Desk:
 Click here for Technology Emergency Contacts
 Click on the problem type below that best describes your issue.

Alarm Bell	Antenna Work	Audio / Visual	Blackboard
CD Drive	Closed Circuit TV Systems	Data Repair	Email
Fire Alarm Systems	Laptop	Network Application	Projector (Data/Computer)
Support Desk	TV / Television		

Technology Emergency
 Check here if this is an emergency or call any of the emergency contacts below.

Contact Name	Contact Phone
No contacts listed.	

Step 4 Please describe your problem or request.

Step 5 Requested Completion Date

(A valid date is required. Text is not accepted, but you may leave it blank. Click here for assistance in date entry.)

Step 6 Submittal Password

[Forgot Password?](#)

Submittal Password is ndn

Step 7

15. This is the point where all Requesters start once they are in the system: the Work Order/IT Incident Request form. Welcome aboard!

II. You Are Here: The Incident Request Page.

Once you've visited www.myschoolbuilding.com and logged in using your email address, you will be taken directly to the incident request page. This serves as your Home page for MySchoolBuilding.com and should look something like this:

Work Request | Schedule Request | Inventory Request | Trip Request | My Requests | Settings | Help

ASSIGNMENT | SEARCH KNOWLEDGE BASE | HELP

Welcome
To submit your request complete the following form.

Indicates required information.

Step 1 Please be yourself, click here if you are not Gena Dude



First Name	Last Name	Email
<input type="text" value="Gena"/>	<input type="text" value="Dude"/>	<input type="text" value="genadude@geewiz.com"/>
Phone	Pager	Cellular Phone
<input type="text" value="919-555-8282"/>	<input type="text"/>	<input type="text" value="919-555-3221"/>

Step 2 Location














-- Select Location --
Area
-- Select Area --
 Yes, remember my area entries for my next new request entry.

Area/Room Number

Step 3 Select Problem Type:

 **Maintenance Help Desk** OR  **Technology Help Desk**















Maintenance Help Desk:
Click here for Maintenance Emergency Contacts
Click on the problem type below that best describes your issue.

 Athletic Fields	 Audio/Visual	 Cafeteria	 Carpentry
 Climate Control	 Custodial	 Electrical	 Food Services
 Heating/Ventilation /Air Conditioning	 Lighting	 Office Supplies	 Plumbing
 Windows			

Maintenance Emergency
 Check here if this is an emergency or call any of the emergency contacts below.

Contact Name	Contact Phone
No contacts listed.	

Technology Help Desk:
Click here for Technology Emergency Contacts
Click on the problem type below that best describes your issue.


 Alarm Bell	 Antenna Work	 Audio / Visual	 Blackboard
 CD Drive	 Closed Circuit TV Systems	 Data Repair	 Email
 Fire Alarm Systems	 Laptop	 Network Application	 Projector (Data/Computer)
 Support Desk	 TV / Television		

Technology Emergency
 Check here if this is an emergency or call any of the emergency contacts below.

Contact Name	Contact Phone
No contacts listed.	

Step 4 Please describe your problem or request.

Step 5 Requested Completion Date


(A valid date is required. Text is not accepted, but you may leave it blank. Click here for assistance in date entry.)

Step 6 Submittal Password

[Forgot Password?](#)

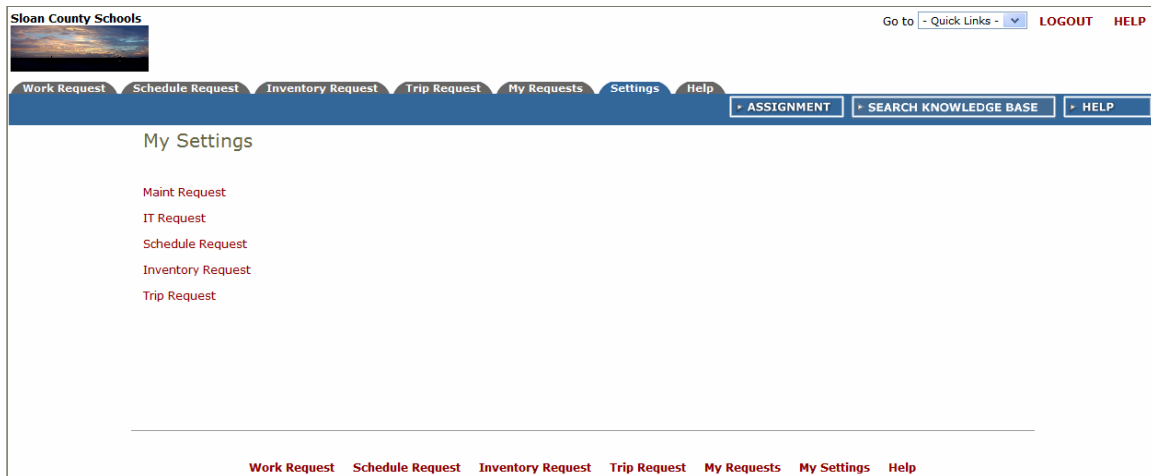
Step 7

Across the top of the page, you'll notice several tabs, depending on which SchoolDude products your facility uses. The tabs shown above are labeled "**Work Request**" (for MaintenanceDirect and ITDirect clients), "**Schedule Request**" (for FSDirect clients), "**Inventory Request**" (for InventoryDirect clients), "**Trip Request**" (for TripDirect clients), "**My Requests**", "**Settings**", and "**Help**". These tabs are how you navigate to the information that you need. In the following sections, we'll show you around MySchoolBuilding.com and each tab will be explained. You'll see what they contain and how to use them. (We'll get into the actual incident request a little further along.)

III. The Settings Page: Your Information in a Nutshell.

Before we get started in a bit with making incident requests, let's take a moment to check out the **Settings** page, which contains your information as entered by the Administrator during the Account Setup process. If you set up your own account, this page will show the information you entered earlier. Use this page to edit your information.

If your facility uses more than one SchoolDude product, you'll see this page when you click the **Settings tab**:



- Simply click on the type of requests you'll make for the product you're using. In this case, click the **IT Request link**. You'll be taken to the **Settings** page for IT Direct users.

The Settings page looks like this:

Sloan County Schools MD LOGIN LOGOUT HELP

Work Request Schedule Request Inventory Request Trip Request My Requests Settings Help

ASSIGNMENT SEARCH KNOWLEDGE BASE HELP

My Settings

Please be yourself, click [here](#) if you are not Gena Dude

Indicates required information.

First Name **Last Name**

Email Address

Phone Number Pager

Cellular Phone

Use these generic email notification settings.

- Send Requester Incident Request Receipt Notification? [Sample](#)
- Notify Requester of Incident Request Assignment? [Sample](#)
- Notify Requester of Incident Request Change in Status? e.g. On-hold, Void, Duplicate Request, Waiting Parts, etc. [Sample](#)
- Notify Requester of Incident Request Completion? [Sample](#)
- Notify Requester of Incident Request Closure? [Sample](#)
- Notify Requester of Incident Request Void? [Sample](#)
- Notify Requester of Incident Request Duplicate? [Sample](#)
- Notify Requester of Incident Request Declined? [Sample](#)

I prefer these email notification settings.

- Send Requester Incident Request Receipt Notification? [Sample](#)
- Notify Requester of Incident Request Assignment? [Sample](#)
- Notify Requester of Incident Request Change in Status? e.g. On-hold, Void, Duplicate Request, Waiting Parts, etc. [Sample](#)
- Notify Requester of Incident Request Completion? [Sample](#)
- Notify Requester of Incident Request Closure? [Sample](#)
- Notify Requester of Incident Request Void? [Sample](#)
- Notify Requester of Incident Request Duplicate? [Sample](#)
- Notify Requester of Incident Request Declined? [Sample](#)

Password

- Make any changes you wish to make, enter your password at the bottom

OR

- To continue without making any changes, simply click the **Back** button at the top of your page or click the **Tab** of the page you wish to go to next.
- Enter your **password** in the space provided.
- Click the **Submit** button.

If you have made changes, the page will refresh to bring up the same screen only now, the words “My Settings Saved” will appear in red at the top of the page (see below). That’s it! Proceed by clicking the **Tab** of the page you’d like to go to next, up near the top of the screen.

Sloan County Schools [RD LOGIN](#) [LOGOUT](#) [HELP](#)

Work Request Schedule Request Inventory Request Trip Request My Requests **Settings** Help

[ASSIGNMENT](#) [SEARCH KNOWLEDGE BASE](#) [HELP](#)

My Settings

Please be yourself, [click here](#) if you are not Gena Dude

My Settings Saved.

Indicates required information.

First Name <input checked="" type="checkbox"/>	Last Name <input checked="" type="checkbox"/>
Gena	Dude
Email Address <input checked="" type="checkbox"/>	
genadude@geewiz.com	
Phone Number	Pager
(919) 555-8282	
Cellular Phone	

IV. The IT Incident Request: ITDirect in Action

Now that you've logged in and checked out your settings page to make sure that all of your information is correct, we'll move on to what you're really here for: making incident requests.

The Work Request page (reached by clicking the **work request tab** near the top of the page from wherever you are in MySchoolBuilding.com) displays the form you'll fill out each time you want to request that work be done. Those fields marked with a red checkmark in a box () are required and can't be skipped. The rest, you should just fill in as you are able to make the incident request as detailed and helpful to those processing it as possible (this can speed the process up a bit).

Here again is a view of the incident work request page (see the next page):

Welcome

To submit your request complete the following form.

Indicates required information.

Step 1 Please be yourself, click here if you are not Gena Dude

First Name	Last Name	Email
<input type="text" value="Gena"/>	<input type="text" value="Dude"/>	<input type="text" value="genadude@geewiz.com"/>
Phone	Pager	Cellular Phone
<input type="text" value="(919) 555-8282"/>	<input type="text"/>	<input type="text"/>

Step 2 Location

-- Select Location --

Area	Area/Room Number
-- Select Area -- <input type="button" value="v"/>	<input type="text"/>

Yes, remember my area entries for my next new request entry.

Step 3 Select Problem Type:



Maintenance Help Desk

OR



Technology Help Desk

Maintenance Help Desk:

Click here for Maintenance Emergency Contacts
Click on the problem type below that best describes your issue.

- Athletic Fields
- Audio/Visual
- Cafeteria
- Carpentry
- Climate Control
- Custodial
- Electrical
- Food Services
- Heating/Ventilation /Air Conditioning
- Lighting
- Office Supplies
- Plumbing
- Windows

Maintenance Emergency

Check here if this is an emergency or call any of the emergency contacts below.

Contact Name	Contact Phone
No contacts listed.	

Technology Help Desk:

Click here for Technology Emergency Contacts
Click on the problem type below that best describes your issue.

- Alarm Bell
- Antenna Work
- Audio / Visual
- Blackboard
- CD Drive
- Closed Circuit TV Systems
- Data Repair
- Email
- Fire Alarm Systems
- Laptop
- Network Application
- Projector (Data/Computer)
- Support Desk
- TV / Television

Technology Emergency

Check here if this is an emergency or call any of the emergency contacts below.

Contact Name	Contact Phone
No contacts listed.	

Step 4 Please describe your problem or request.

Step 5 Requested Completion Date

(A valid date is required. Text is not accepted, but you may leave it blank. Click here for assistance in date entry.)

Step 6 Submittal Password

[Forgot Password?](#)

Step 7

Follow these steps to fill out the form (It'll only take a minute or two!):

- **Step 1:** Be yourself. Make sure that it's your information in the contact spaces provided. If not, click the word "here", shown in red, to log in as yourself.
- **Step 2:** Enter your Location, Area, and Area Number.
- **Step 3:** Select the **Problem Type** that best describes your issue: Maintenance Help Desk or Technology Help Desk. Since we're working with ITDirect, click the ITDirect Technology Help Desk icon. This will bump you past the maintenance issues and down to the technology ones. Some examples are Audio/Visual, Email, Laptop, etc. These problem types were specifically selected by the Administrator of your account for use at your facility.
- Once you click on a problem type, the page will refresh and your problem type will be highlighted with a red circle that says "OK".
- If this is an emergency, check the **Technology Emergency box** below the problem types list.
- **Step 4:** **Describe** your problem or request.
- **Step 5:** Enter the **Requested Completion Date**. Click the **calendar icon** next to the date field to choose a date from the calendar.
- **Step 6:** Include any attachments, if necessary.
- **Step 7:** Enter your **submittal password**. This password will be the same for all Requesters.
- **Step 8:** Click **Submit**.
 - You will then be taken to the **My IT Requests** page, which will show listed among other requests, the new incident request you just made. We will cover this page in more detail in the next section.

V. My Requests: Keeping Track of Your Requests.

The **My Requests** page gives you a look at all the work requests you've made in ITDirect. You can reach the **My Maint Requests** page by clicking on the **tab** at the top of the **Home** page. It should look something like this, depending on how many requests you've submitted:

Sloan County Schools

MD LOGIN LOGOUT HELP

Work Request Schedule Request Inventory Request Trip Request My Requests Settings Help

ASSIGNMENT SEARCH KNOWLEDGE BASE HELP

My Maint Requests | My IT Requests | My Schedule Requests | My Inventory Requests | My Trip Requests |

My Maint Requests

Note: Once the request is assigned to someone for approval, you no longer can edit the request. You can click on the current assigned person name to send email and request changes on your request.

Request Totals
0New Request

Search for "

Search this results for: GO Show All

1 - 0 of total 0 listed

Status	Location	Action Taken	Complete Date
WOID	Description	Request Date	
Area		Type	
Area Number			

No requests found for your email account genadude@geewiz.com.

Work Request Schedule Request Inventory Request Trip Request My Requests My Settings Help

Conditions of Use | Privacy Policy | Help

As you've probably noticed, this page is labeled for maintenance requests and will show all of any requests you've made in SchoolDude, for any products you work with. To specify IT Requests, click the **My IT Requests** link near the top of the page, shown in red. See below:

Sloan County Schools

Work Request Schedule Request Inventory Request Trip Request My Requests Settings Help

My Maint Requests | My IT Requests | My Inventory Requests | My Trip Requests |

My Maint Requests

Request

The My IT Requests page looks very similar to the last page we were on. The only difference is that now, you'll only see IT incident requests you've made. See below:

Sloan County Schools MD LOGIN LOGOUT HELP

Work Request Schedule Request Inventory Request Trip Request My Requests Settings Help

ASSIGNMENT SEARCH KNOWLEDGE BASE HELP

My Maint Requests | My IT Requests | My Schedule Requests | My Inventory Requests | My Trip Requests |

My IT Requests

Note: Once the request is assigned to someone for approval, you no longer can edit the request. You can click on the current assigned person name to send email and request changes on your request.

Request Totals
1 New Request

Search for "

Search this results for: [GO](#) [Show All](#)


1 - 1 of total 1 listed

Status	Location	Action Taken	Complete Date
Incident ID Area Area Number	Description	Request Date Type	
New Request 127 Auditorium	Sloan High School Laptop won't connect with the internet.	No Action Note 8/20/2007 12:05:08 PM Laptop	

[Previous 10](#) [Next 10](#)

[Print](#) [Previous 10](#) [Next 10](#)

Work Request Schedule Request Inventory Request Trip Request My Requests My Settings Help

- Each request you make will be added to this list, where you can check its current status, who it's been routed to, the date you submitted it, and any Action notes that have been made.
- You can print your requests using the **Print icon** near the bottom left-hand corner of the page:

- To search your requests, enter a key term in the **Search** field, located just above your request list, then click **Go**. To show all requests (after searching for work orders), click the **Show All link**.
- To view only requests of a certain status, click the **number** next to the status under the "Request Totals" section (near the top, right-hand corner).

VI. Search Knowledge Base: Answers to Frequently Asked Questions.

The purpose of the Knowledge Base is to assist all users of ITDirect by giving the answers to recurring questions to see if they can correct the current issue on their own. The Administrator of your account has the ability to enter frequently asked questions, along with their answers, which you can then search to find the answers you need. You can even search by answer!

Get started by clicking the [Search Knowledge Base link](#), shown near the top, right-hand side of your page.

It will look something like this, depending on how much information your Administrator has entered to this point:

The screenshot shows the 'Knowledge Base Search' page for Sloan County Schools. The page has a blue header with navigation links: 'Work Request', 'Schedule Request', 'Inventory Request', 'Trip Request', 'My Requests', 'Settings', and 'Help'. On the right side of the header, there are buttons for 'MD LOGIN', 'LOGOUT', and 'HELP'. Below the header, there are buttons for 'ASSIGNMENT', 'SEARCH KNOWLEDGE BASE', and 'HELP'. The main content area is titled 'Knowledge Base Search' and includes a tip: 'Tip: To select multiple choices in each list box use the Ctrl key to select. Top 10 frequent used KB'. There are six dropdown menus for filtering: 'Project' (options: Include All Projects, Blank, Playground Refurbishment), 'Purpose' (options: Include All Purposes, Blank, Upgrade), 'Problem Type' (options: Include All Problem Types, Blank, Alarm Bell, Antenna Work, Audio / Visual, Blackboard, CD Drive, Closed Circuit TV Systems, Data Repair, Email), 'Custom Category' (options: Include All Custom Category, Blank), 'Classification' (options: Include All Classifications, PC), and 'Type' (options: Include All Types, Dell). Below the filters are text input fields for 'Question', 'Keywords', and 'Answer'. At the bottom, there is a 'Sort By' dropdown set to 'Question' and radio buttons for 'Ascending' (selected) and 'Descending'. A 'Search NOW' button is at the bottom center.

In the boxes provided, select the following from the options given:

- Project
- Purpose
- Problem Type
- Custom Category
- Classification
- Type

Next, enter:

- Your **question**.
- **Answer**.
- Any **Keywords** you wish to include.
- Choose your “**Sort By**” category: Question, Answer, Keyword, Project, Purpose, Problem Type, Custom Category, Classification, or Type.
- Then choose whether to sort by ascending or descending order.
- Click the **Search Now button**.

If a question fitting your criteria has been entered into the system, you'll be taken to the **Knowledge Base Search Results** page, which looks like this:

Sloan County Schools MD LOGIN LOGOUT HELP

Work Request Schedule Request Inventory Request Trip Request My Requests Settings Help

ASSIGNMENT SEARCH KNOWLEDGE BASE HELP

Legend: Click to sort table by that column.

Knowledge Base Search Results

1 - 3 of total 3 listed

Project Classification Type	Problem Type Purpose	Keywords Custom Category	Question Answer
PC	Support Desk Upgrade		Sample question 1? Sample answer 1.
			Sample question 3 sample answer 3
PC	Support Desk Upgrade		Sample question 2. Sample answer 2.

Print This! Print to Excel

Work Request Schedule Request Inventory Request Trip Request My Requests My Settings Help

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VII. The Help Tab: Where to Go With Your Questions.

We know that sometimes you have questions or issues that you need to speak with someone about specifically. For that reason, we've provided the **Help** page (reached by clicking the **tab** at the top of the page), which looks like this:

Sloan County Schools

MD LOGIN LOGOUT HELP

Work Request Schedule Request Inventory Request Trip Request My Requests Settings Help

ASSIGNMENT SEARCH KNOWLEDGE BASE HELP

HELP

MaintenanceDirect and ITDirect

1) For questions or problems contact or call:
Contact Name Contact Phone
No MaintenanceDirect contacts listed.

2) Download MD & ITD Requester Manual

FSDirect

1) For questions or problems contact or call:
Contact Name Contact Phone

2) Download FSD Requester Manual

InventoryDirect

1) For questions or problems contact or call:
Contact Name Contact Phone

2) Download IND Requester Manual

TripDirect

1) For questions or problems contact or call:
Contact Name Contact Phone
Melissa Dude 919-555-9999

2) Download TD Requester Manual

Work Request Schedule Request Inventory Request Trip Request My Requests My Settings Help

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On this page, you'll see contact information for each of the SchoolDude products you have access to. These contacts are people at your facility that you can call directly with any questions or concerns you may have. Also provided are the manuals for each separate product.