

HART Tasking 101

Sept 2022



Key Contacts – H40 Engineering



Program Manager

Derek Orban – dorban@harttech.com

Contract Support Staff

Ashton Minor – aminor@harttech.com – Admin

IT Support

- For assistance with any IT issues related to HART systems and equipment, file a support ticket in the WfM Tasking Portal:
<https://h40.hart-tasking.com/support/newticket>
- If you are unable to log in, please reach out to supportteam@harttech.com for assistance

Key Contacts – H30 Engineering



Program Manager

Patrick Chesnut – pchesnut@harttech.com

Contract Support Staff

Kathryn Truslow – ktruslow@harttech.com

IT Support

- For assistance with any IT issues related to HART systems and equipment, file a support ticket in the WfM Tasking Portal:
<https://h30.hart-tasking.com/support/newticket>
- If you are unable to log in, please reach out to supportteam@harttech.com for assistance

How To – Status Reporting



Contract Reporting Requirements

- **Contract Requirement:**

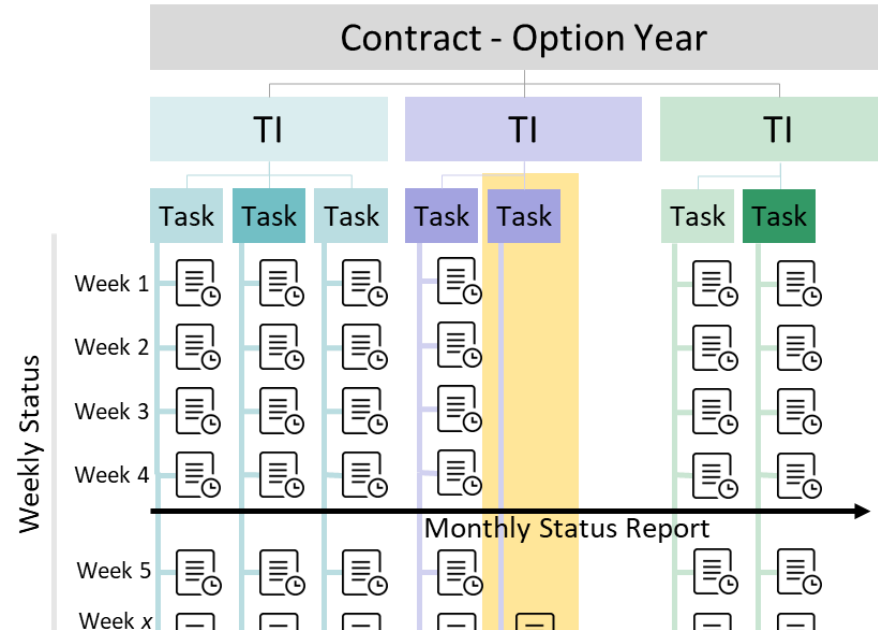
Monthly Report of **funding** and **technical** support by Task Instruction (TI)

- **Weekly Status Reports are:**

- OFFICIAL records
- Gathered for Monthly Reporting
- Tie work to funding, contract requirement

Focus reports on:

- Project Highlights and Contributions
- Performance of Requirements
- High level status
- Relevant Contract Support Activities (e.g. “Attended mandatory lithium battery training”)



Do not include:

- Airing of the grievances
- Minutiae of daily operations (e.g. “Checked e-mail”)
- Non-Chargeable activities (e.g. “Attended corporate party”)

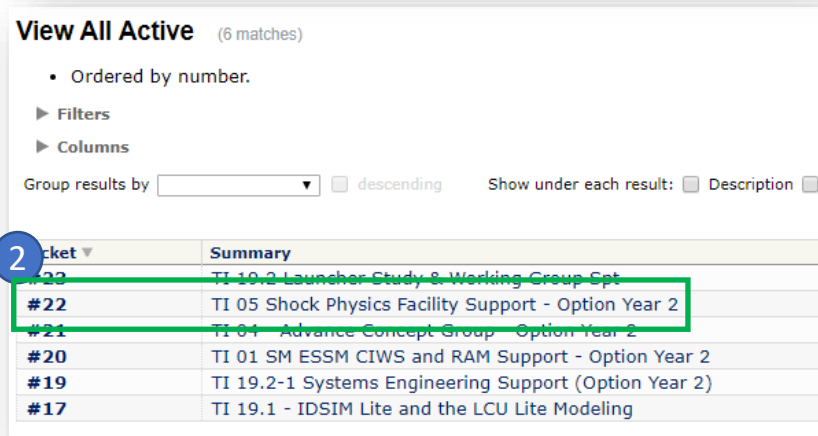
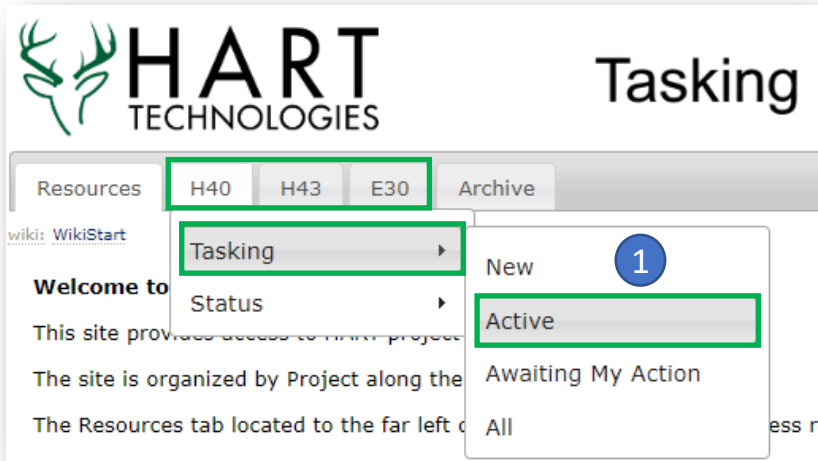
DO NOT include *Classified* information in Status Reports

Weekly Reporting – How To (H40 Engineering)



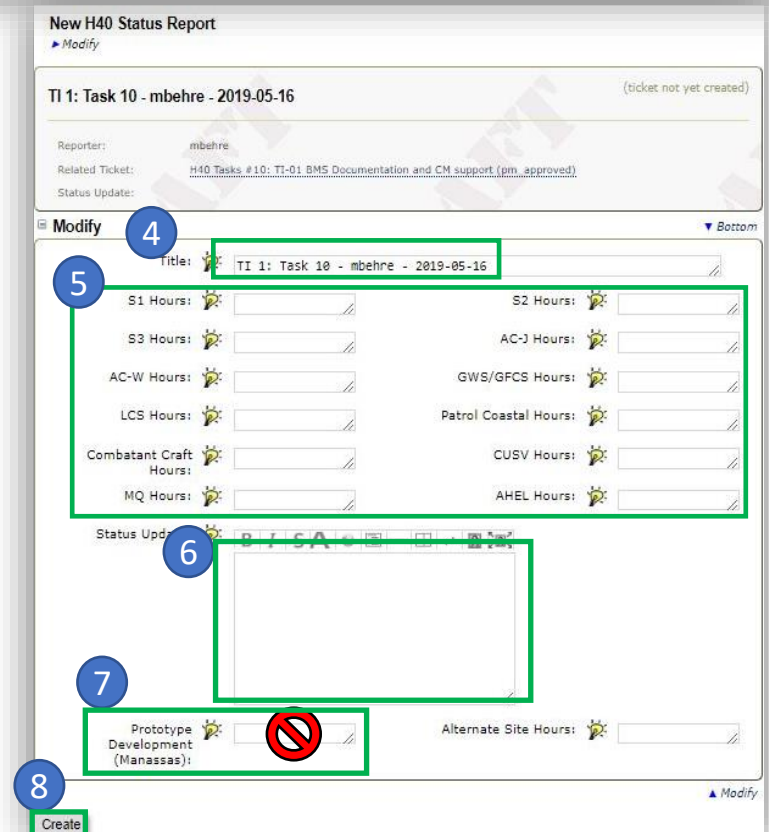
H40 Tasking : <https://h40.hart-tasking.com>

Status Support: h40status@harttech.com



Reporting Steps

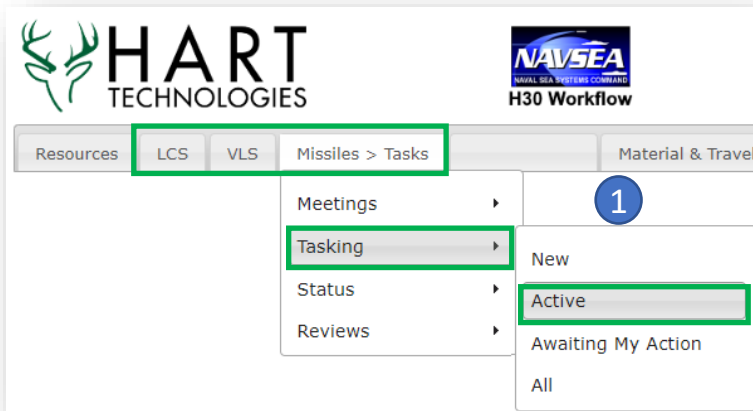
- 1 Open Active Tasking
- 2 Select Ticket Number
- 3 Click on Status Report
- 4 Correct Auto-Generated Date in Title
- 5 Enter Project Hours
- 6 Enter Status Update
- 7 Do not complete Prototype Development
- 8 Click 'Create'



Weekly Reporting – How To (H30)

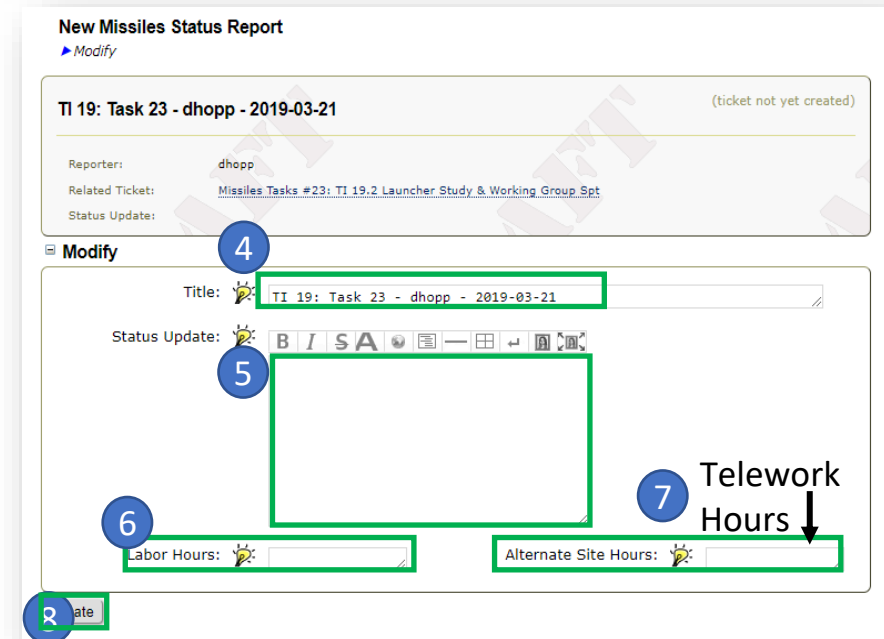
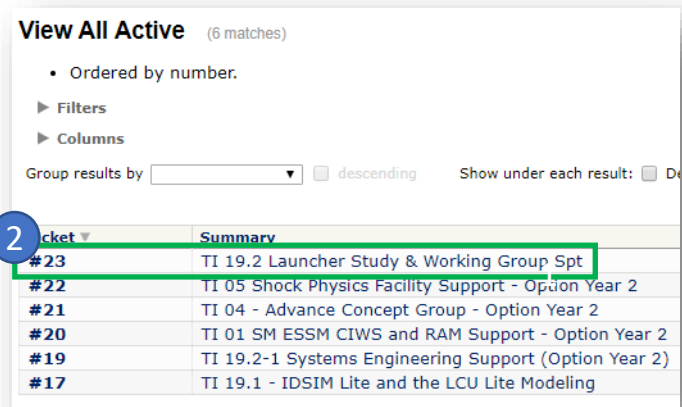
H30 Tasking: <https://h30.hart-tasking.com>

Status Support: h30status@harttech.com



Reporting Steps

- 1 Open Active Tasking
- 2 Select Ticket Number
- 3 Click on Status Report
- 4 Correct Auto-Generated Date in Title
- 5 Enter Status Update
- 6 Enter Labor Hours
- 7 Enter Telework Hours
- 8 Click 'Create'

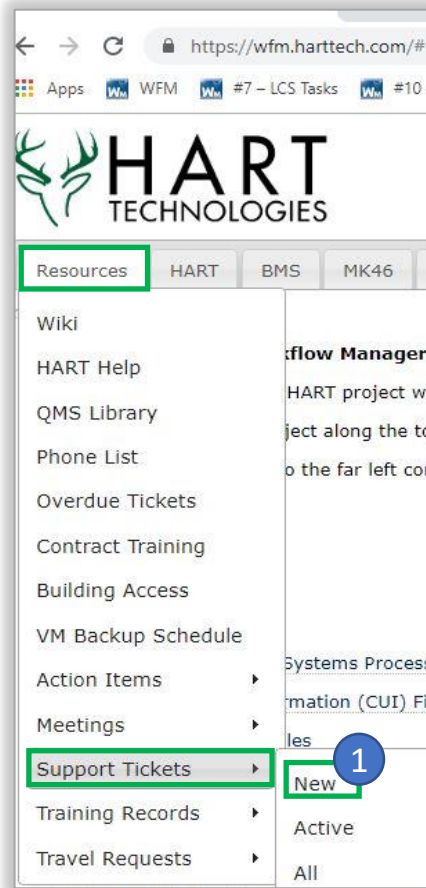


How To – Support Tickets

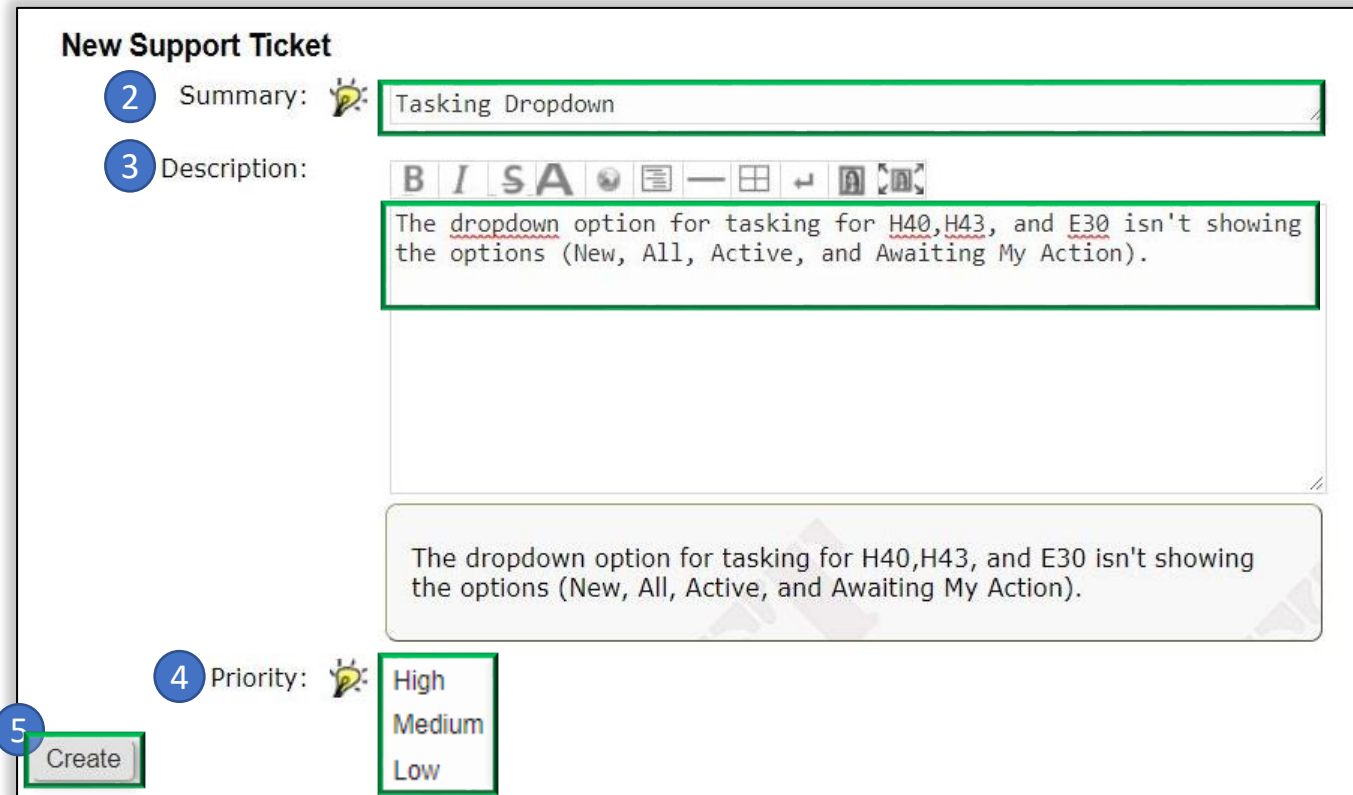


Support Tickets –Part 1 -- Creation

Log into your project tasking site to file support tickets



- 1 Under Resources, scroll to Support Tickets and click New
- 2 Summary: 2-6 Word Description
- 3 Description: Detailed explanation of need and impact
- 4 Priority:
 - ❖ Low (non-urgent with workaround)
 - ❖ Medium (non-urgent without workaround)
 - ❖ High (urgent without workaround)
- 5 Click 'Create' to save the New Ticket



A screenshot of the 'New Support Ticket' form. The 'Summary' field contains 'Tasking Dropdown'. The 'Description' field contains the text: 'The dropdown option for tasking for H40, H43, and E30 isn't showing the options (New, All, Active, and Awaiting My Action)'. The 'Priority' dropdown is set to 'High'. A blue circle with the number '5' is placed over the 'Create' button.

If you are unable to log in the tasking server, you can e-mail: supportteam@harttech.com to request assistance

Support Tickets –Part 2 -- Submission

Once created, the system will immediately load the ticket you just filed. However, at this stage the ticket **IS NOT SUBMITTED**, and the IT team will not be notified of your issue.

Change history / Assignments / Add a comment / History / Home

Requesting SolidWorks 2022 for Task Opened Friday, September 9, 2022 (3 day)
Last modified Friday, September 9, 2022 (2 day)

[Work Order](#) [NCR](#) [Action Item](#)
[Print View](#)

Reporter: Ryan Mowery (rmowery)
Description: Need most recent version of solidworks to open files for CR1019 .
Priority: High Assigned To: Christen Lunsford (clunsford)
Resolution: Logged in remotely and installed

Submitted Date: 09/09/2022
Assigned Date: 09/09/2022
In Work Date: 09/09/2022
Recommend to Close Date: 09/09/2022
Child Tickets:

1

Once your ticket is loaded, review the contents of the yellow ticket area to ensure you're satisfied with the request

Change History

Actions

Save changes
 Transition to 'submitted'
 Transition to 'on_hold'
 Transition ticket to 'closed'
 Forward this ticket

[Apply](#)

2

When you're satisfied, select "Transition to Submitted" and then click the "Apply" button at the bottom of the page to initiate the support process

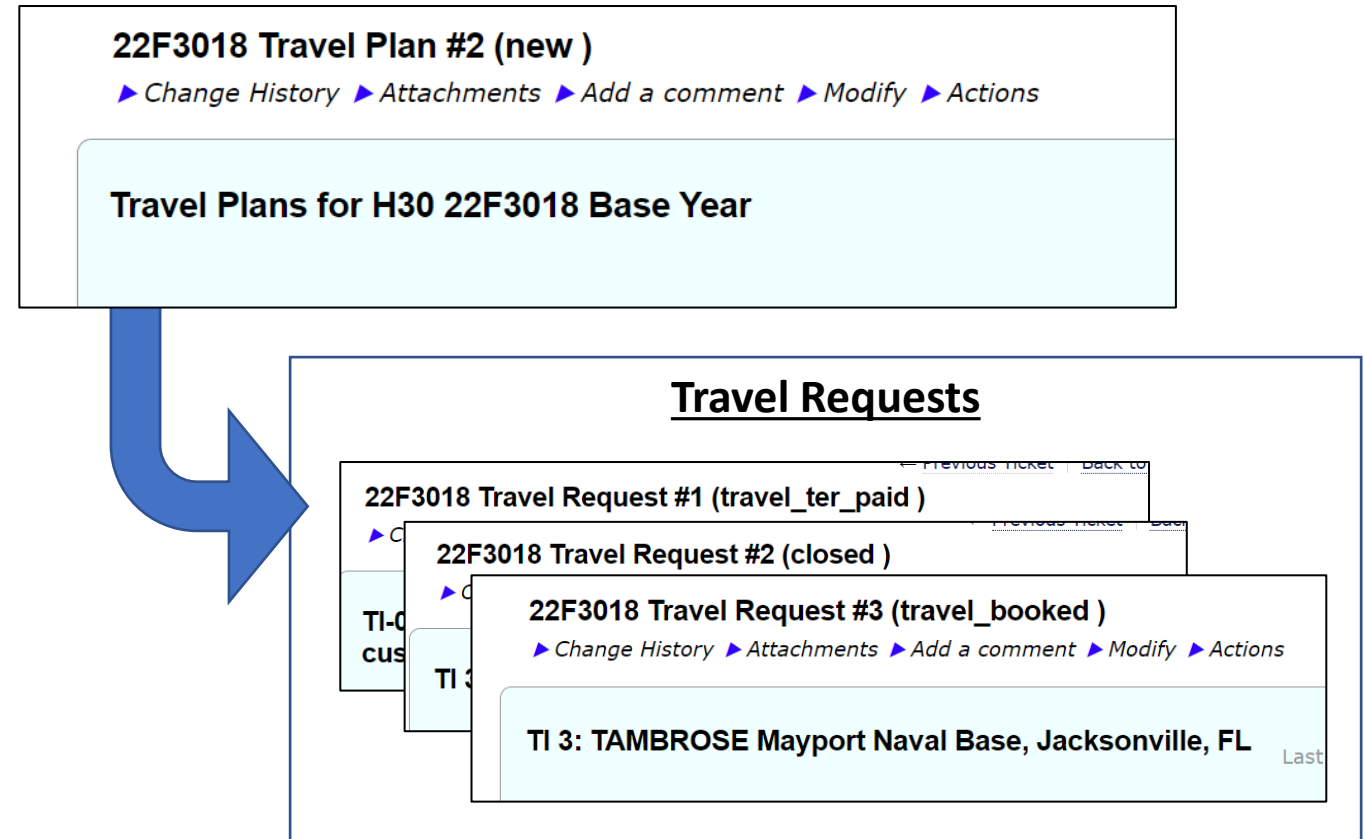
How To – Travel Requests



Travel Requests

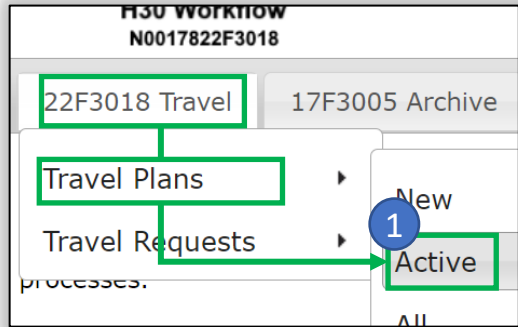


- Travel requests tickets are filed by a traveler to initiate booking, track approvals and file for post-travel reimbursements when on officially approved travel
- Travel plan tickets are utilized to plan for upcoming travel and are filled out by contract management and support personnel
- **Travel Requests:**
 - Are mandatory for all official travel
 - Must be generated from an approved travel plan
 - Must be approved PRIOR to booking any travel arrangements

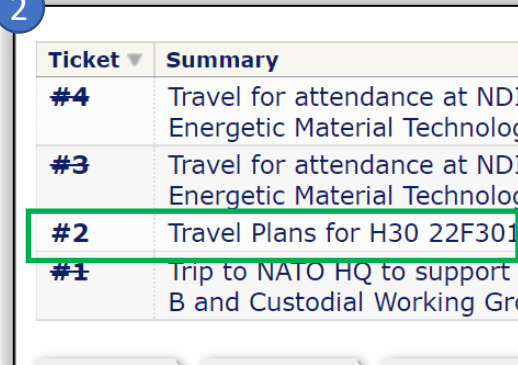


Travel Requests –Part 1 -- Creation

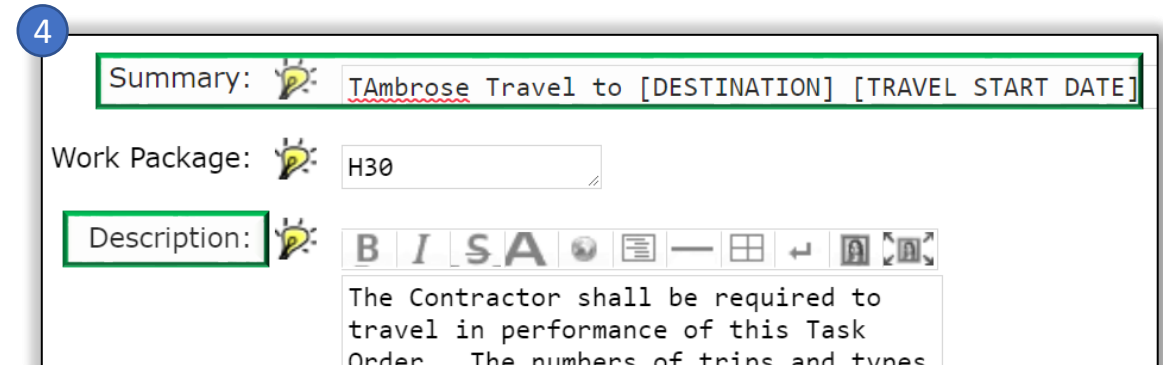
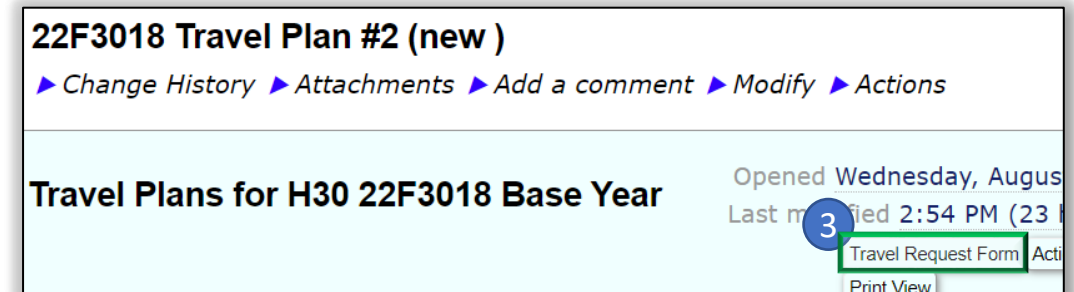
Log into your project tasking site to file Travel Request tickets



- 1 Find the appropriate travel tab for your project and select Travel Plans -> Active
- 2 From the listing of active plans select the plan that is appropriate for your travel
- 3 Click the “Travel Request Form” button in the top-right to generate a travel request



- 4 Ensure all fields are filled out
 - ❖ Summary – Update Destintation/Travel date
 - ❖ Description – Update to a brief description of the upcoming travel
- 5 Click at the bottom to save the New Ticket



If you have additional questions please contact your project admin personnel or program manager

