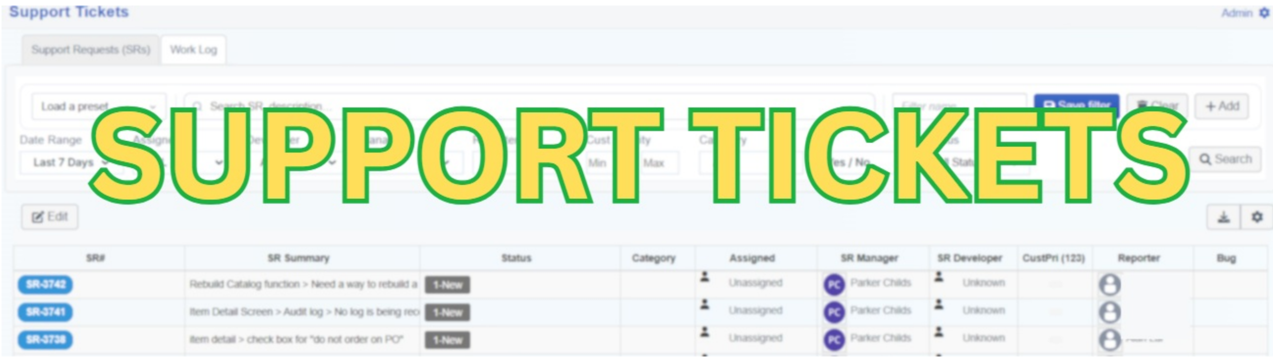
# Support Tickets - How to's (Jira Ticketing Embedded into 1place, Filtered to Customers Jira Tickets)

Last Modified on 08/19/2026 11:19 pm EDT

# Support Tickets




## Overview

The **Support Tickets** feature provides a centralized location within **1place** where users can **view and manage support requests** associated with their company. By integrating support activity directly into 1place, users can easily track the progress of submitted issues, questions, and enhancement requests without relying solely on email communications.

Support requests submitted to our team are automatically synchronized with 1place, allowing users to monitor updates directly from the application. Users can **view ticket details, track status changes, review communication history**, and stay informed on the **progress** of ongoing work.

This feature improves visibility into the support process by providing greater transparency into ticket activity, updates from our team, and work performed. With all support-related information accessible in one place, users can collaborate more effectively, submit new requests, and stay informed throughout the lifecycle of their support tickets.

### Key Benefits

- **View all support tickets** associated with your company in one location.
- **Submit new support requests** directly from 1place.
- **Monitor ticket status and progress** in real time.
- **Review communication history and updates** from the support team.
- Gain **visibility into work performed** on support requests.
- Quickly **locate tickets** using **search** and **filtering** options.
- Save frequently used filter criteria as company-specific **preset filters.**
- **Reduce the need to search through email threads** for ticket updates.
- Maintain a **centralized record of support activity** within 1place.

# Accessing Support Tickets

Follow the steps below to access the Support Tickets dashboard:

1. In 1place, click the **Settings** (**gear icon**) located in the upper-right corner of the application, next to your username.

2. From the drop-down menu, select **Support Tickets**.


3. A new browser tab will open displaying the **Support Tickets Dashboard**.

The **Support Tickets Dashboard** provides a centralized view of support requests associated with your company. From this screen, users can:

- View and track support tickets.
- Monitor ticket status and progress.
- Review updates and communication history.
- Submit new support requests.
- Search for specific tickets.
- Filter tickets based on selected criteria.
- Save frequently used filters as company-specific preset filters for future use.

By consolidating support activity into a single dashboard, users can more easily manage requests, track progress, and stay informed on the status of their support tickets.

# Users Access to Support Tickets

Before users can access the **Support Tickets** feature, it must first be enabled for your company by the OneSource team.

If your company does not yet have access, an administrator should submit a **Service Request (SR)** by emailing **support@onesourcesoftware.com** to request that the feature be enabled.

Once the feature has been enabled, an administrator can grant access to individual users by updating their user security settings.

## Granting User Access

To grant a user access to the Support Tickets feature:

1. In 1place, navigate to **Settings** > **Users**.

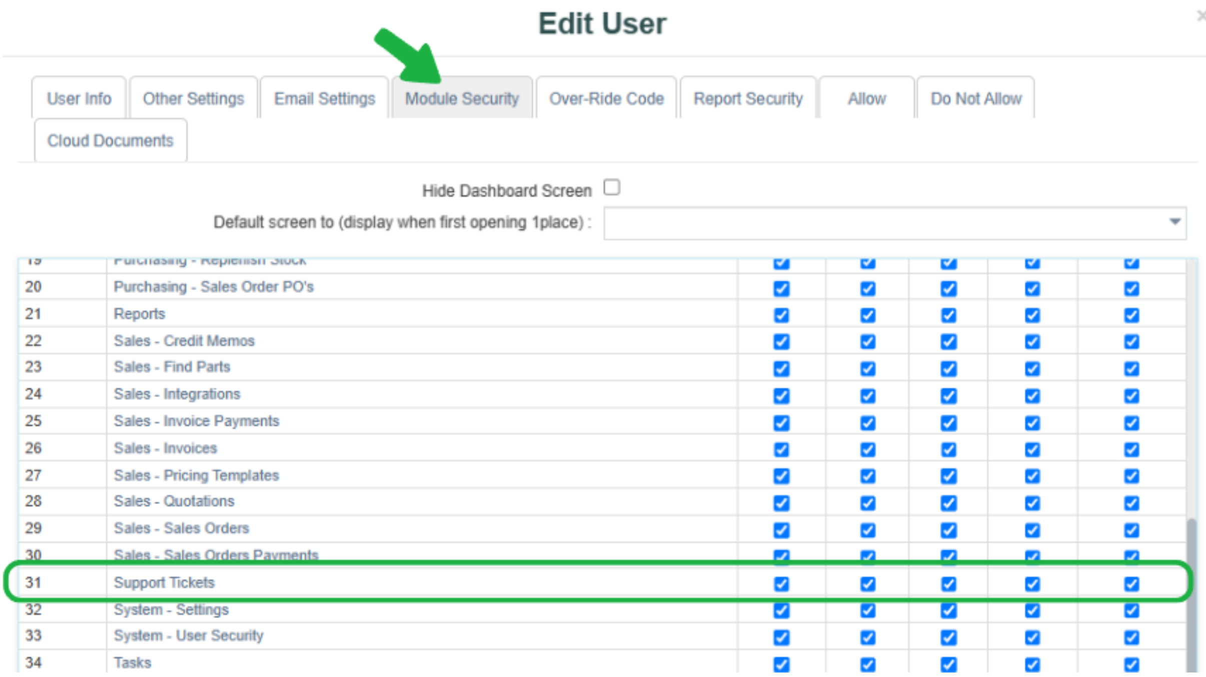
2. Open the user's profile through the Pencil Icon (Edit).

3. Change the user's **Security Group** to **Admin**. (Support Tickets requires **Admin** access)

4. Click **Save** and close the user record.

5. Reopen the user by clicking Pencil Icon (**Edit**.

6. Select the **Module Security** tab.




7. Locate the **Support Ticket** permission.

8. Enable the appropriate permissions based on the user's responsibilities.

## Available Permissions

The following permissions are available for the Support Tickets feature:

| **Permission** | **Description** |
|---|---|
| **View** | Allows the user to view support tickets and their details. |
| **New** | Allows the user to create new support requests. |
| **Edit** | Allows the user to update existing support requests, such as adding comments or modifying permitted information. |
| **Print** | Allows the user to print support ticket information, where applicable. |
| **Delete** | Allows the user to delete support tickets, if permitted by your organization's security policy. |

**Note:** The **Support Ticket** permission is available only after the feature has been enabled for your company by the OneSource team and the user's Security Group has been updated to **Admin**.

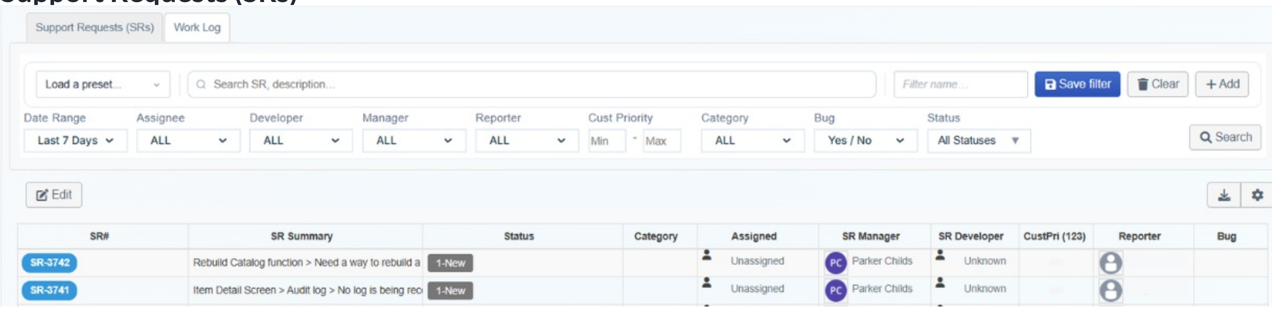
# Support Tickets Dashboard

The **Support Tickets Dashboard** provides a centralized view of all support requests associated with your company. From this screen, users can **search, filter, create, and monitor support tickets** without leaving 1place.

# Dashboard Tabs

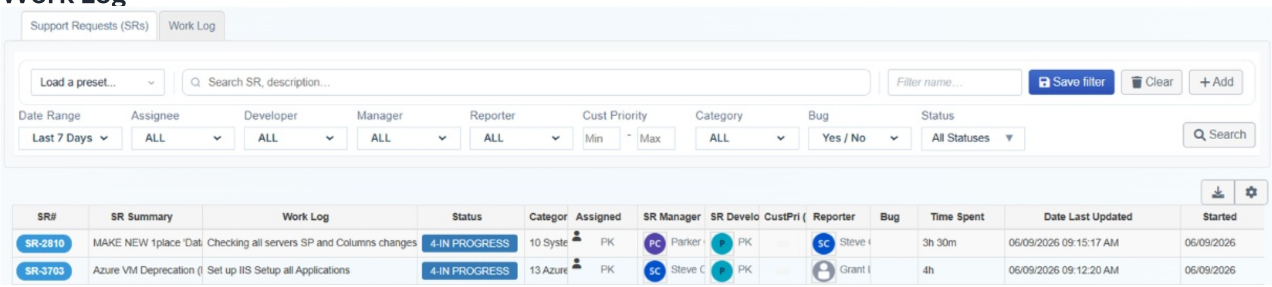
The Support Tickets screen contains two primary tabs:

### Support Requests (SRs)




The **Support Requests (SRs)** tab displays all support requests associated with your company. This dashboard provides visibility into the current status and progress of each request, allowing users to quickly identify open items, monitor ongoing work, and review completed requests.

### Work Log




The **Work Log** tab provides visibility into work performed on support requests, allowing users to review activity and track progress on their requests.

## Support Request Information

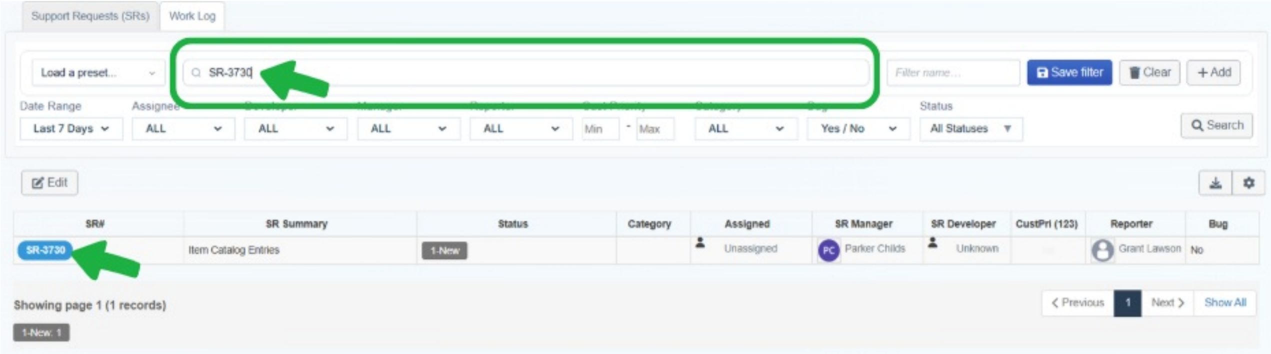
The **Support Requests** grid displays key details for each ticket, including:

| **Column** | **Description** |
|---|---|
| **SR #** | Unique support request number assigned to the ticket. |
| **SR Summary** | Brief description of the issue, request, or enhancement. |
| **Status** | Current stage of the support request. |
| **Category** | Classification of the request. |
| **Assigned** | Current support team member assigned to the ticket. |
| **SR Manager** | Manager overseeing the support request. |
| **SR Developer** | Developer assigned to work on the request, if applicable. |
| **CustPrio** | Customer-defined priority level assigned to the request. |
| **Reporter** | User who submitted the support request. |
| **Bug** | Indicates whether the request has been identified as a software bug. |

## Search and Filter Options

The **Support Tickets Dashboard** includes **powerful search and filtering capabilities** to help users quickly locate and organize support requests.

### Search

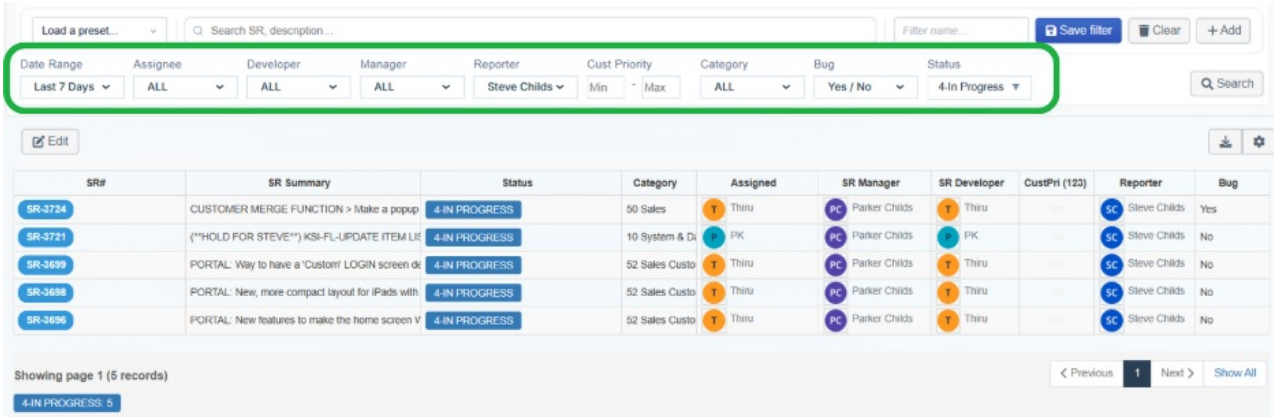



Use the search field to quickly locate support requests by entering:

- An **SR Number**
- Keywords from the **SR Summary**
- Keywords related to the request **description**

This allows users to quickly find a specific support request without manually browsing through the ticket list.

## Available Filters

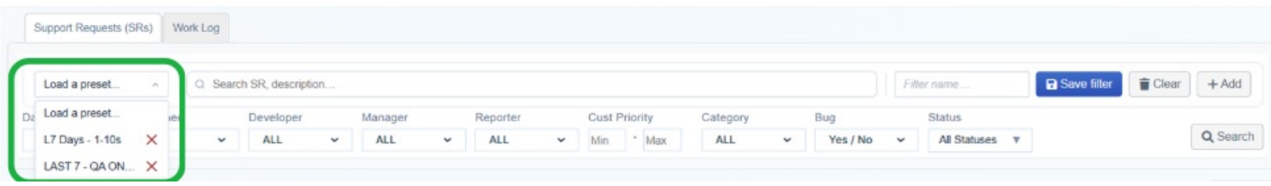



Users can filter support requests using one or more of the following criteria:

- Date Range
- Assignee
- Developer
- Manager
- Reporter
- Customer Priority
- Category
- Bug
- Status
  - The Status filter supports selecting a specific status, multiple statuses, or all statuses.

## Preset Filters

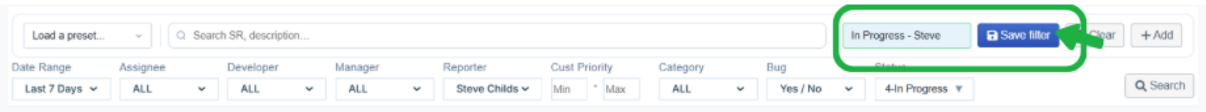
Frequently used filter combinations can be saved as **Preset Filters** for future use.



Preset Filters are company-specific and allow users to quickly apply commonly used search criteria without manually selecting filters each time.

To save a filter:

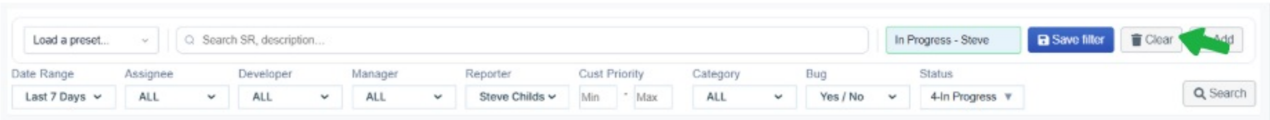
1. Select the desired filter criteria.
2. Enter a name for the filter.
3. Click **Save Filter**.




Saved filters can be selected from the **Load a Preset** drop-down menu.

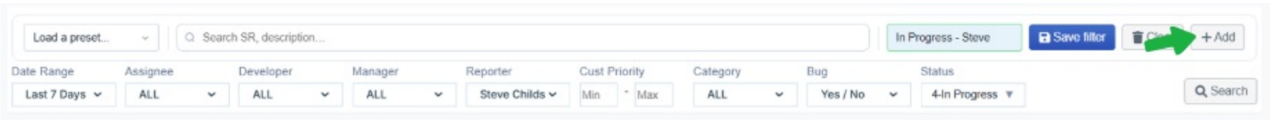
### Clear Filters

Click **Clear** to remove all active filter selections and return the dashboard to its default view.




## Creating a New Support Request

To create a new support request, click the **+ Add** button located in the upper-right corner of the dashboard.



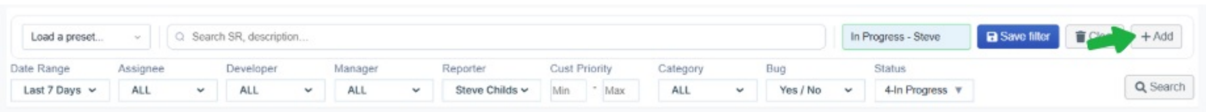

This opens the Support Request entry screen where you can submit a new issue, question, or enhancement request to the support team.

# Creating a New Support Request

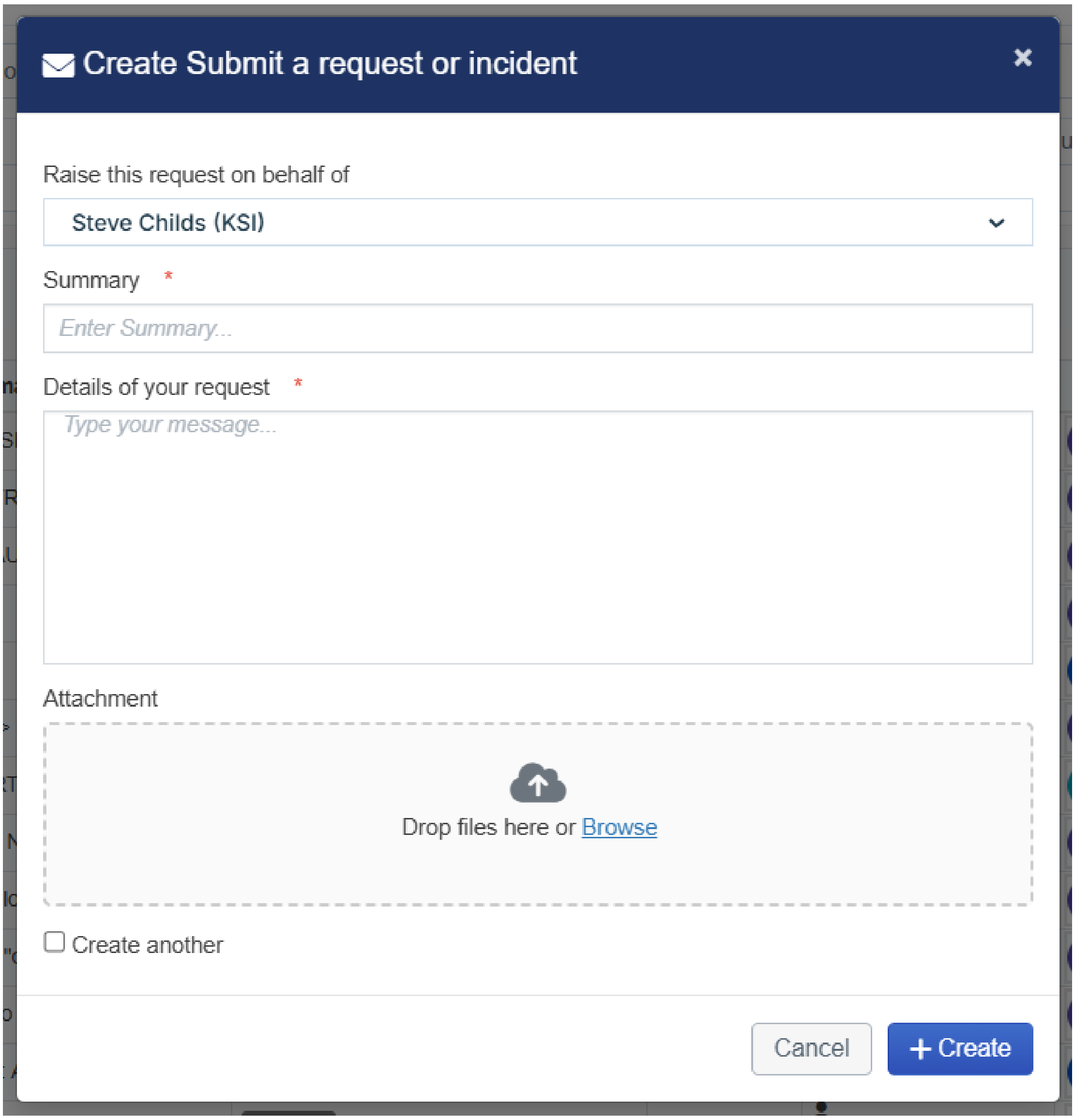
The Support Tickets feature allows users to **submit new support requests** directly from 1place.

To create a new support request:

1. Navigate to the **Support Tickets Dashboard**.
2. Click **+ Add**.




3. Complete the required fields.




4. Attach any supporting files or screenshots, if applicable.
5. (Optional) Select **Create another** if you need to submit multiple requests.
6. Click **Create**.

If **Create another** is selected, a new support request form will automatically open after submission, allowing you to continue creating additional requests.

## Support Request Fields

| Field | Description |
|---|---|
| **Raise this request on behalf of** | Select the user who will be associated with the support request. |
| **Summary** | Enter a brief description of the issue or request. |
| **Details of your request** | Provide detailed information about the issue, including steps to reproduce, expected results, and actual results. |
| **Attachment** | Upload screenshots, documents, or other supporting files that may help the support team investigate the request. |
| **Create another** | After the current support request is submitted, the request form will automatically reopen, allowing you to quickly create another support request without returning to the dashboard. |

## Summary Format Recommendation

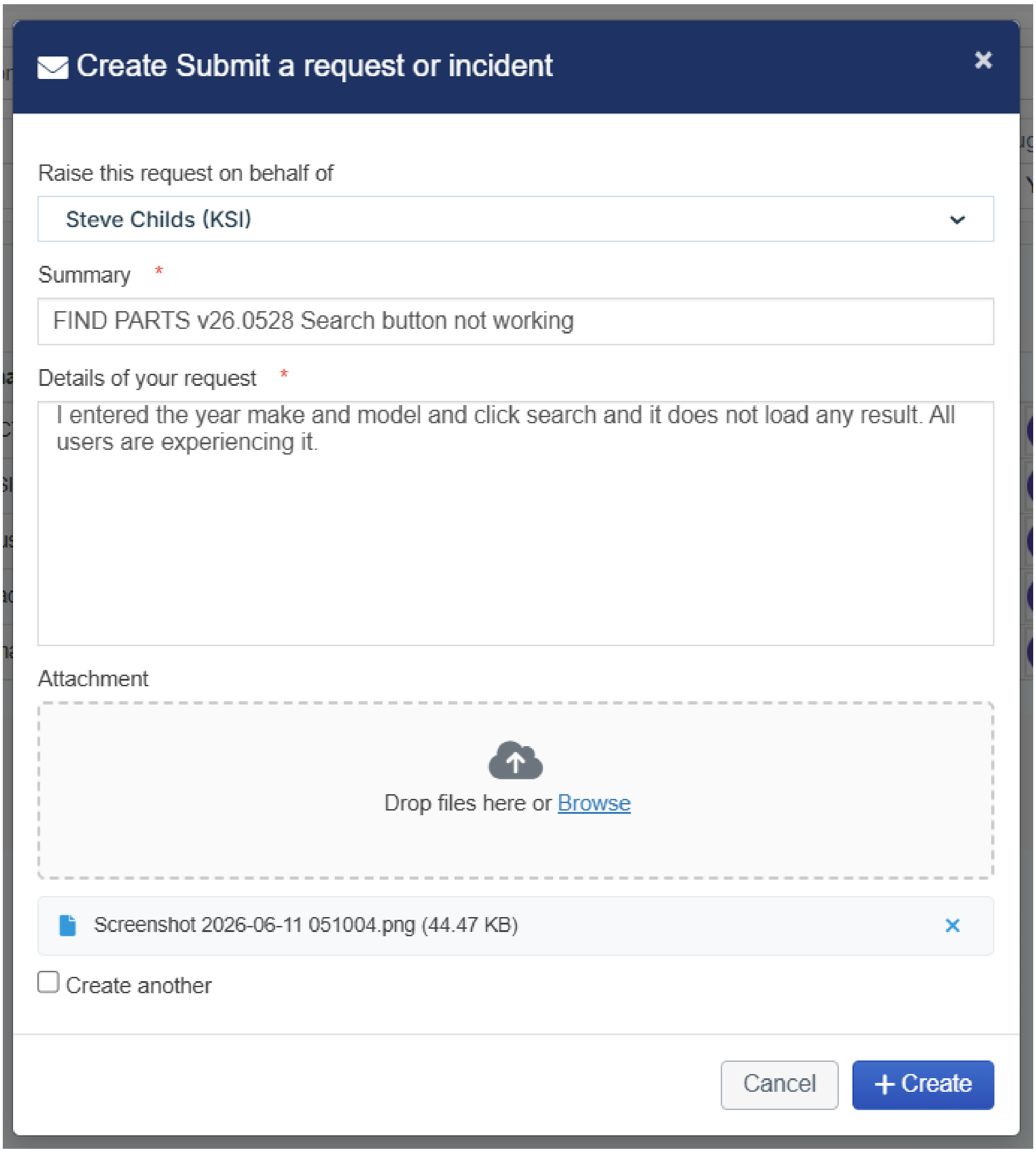
To help the support team quickly identify and route requests, it is recommended that the Summary field follow this format:

**[Screen Name] [Version] - [Issue Description]**

**Example:**

`Item Details > Catalog Tab v26.0605 - Manage Catalog Tab not working`

Using a consistent summary format helps improve ticket organization, reporting, and response efficiency.




## Providing Request Details

When completing the **Details of your request** field, include as much relevant information as possible, such as:

- What you were trying to accomplish.
- The screen or module where the issue occurred.
- Steps to reproduce the issue.
- Expected behavior.
- Actual behavior.
- Any error messages received.
- Version number, if applicable.

The more information provided, the faster the support team can investigate and respond to your request.

## Attachments

Including screenshots, documents, or other supporting files can help provide additional context and may reduce the time required to investigate your request.

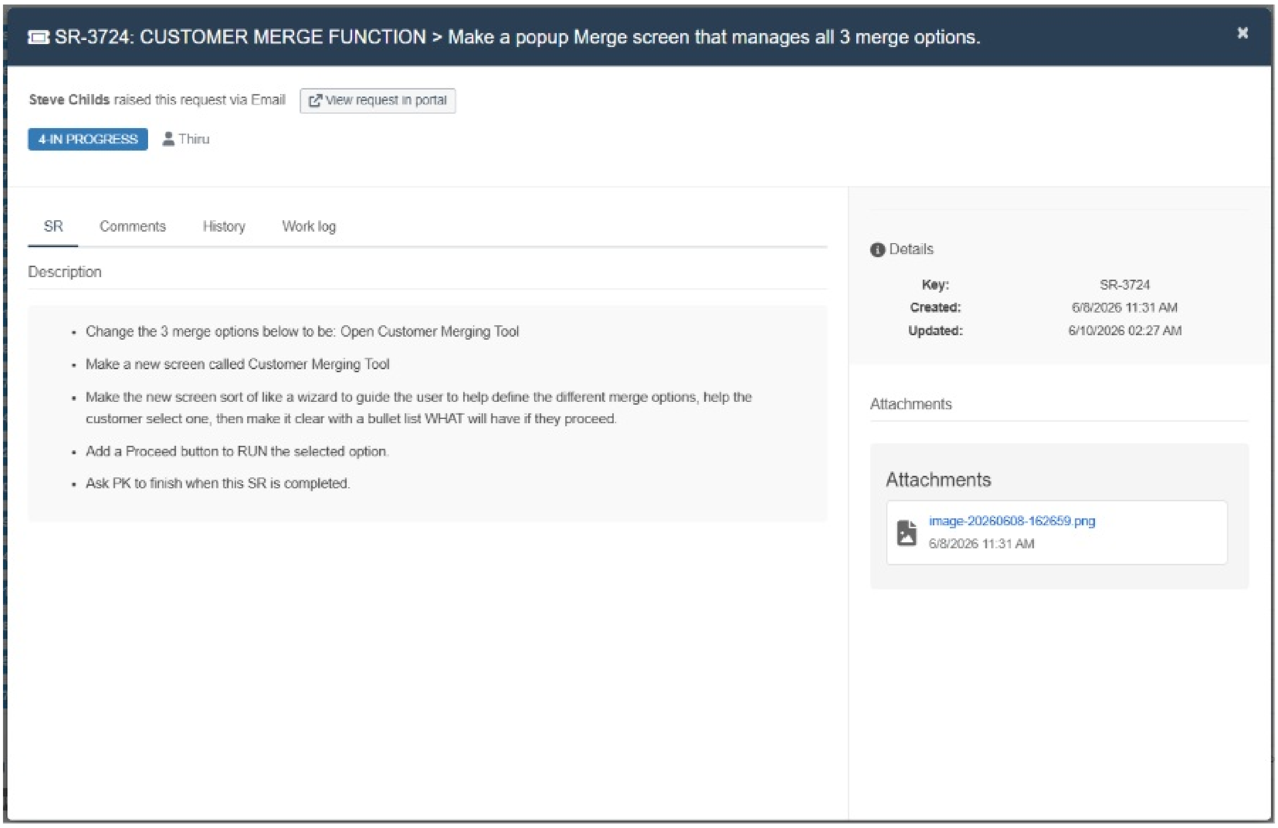
For best results, attach:

- Screenshots of the issue.
- Error messages.
- Reports or exported data related to the request.
- Any documentation that may assist in reproducing the issue.

# Viewing a Support Request

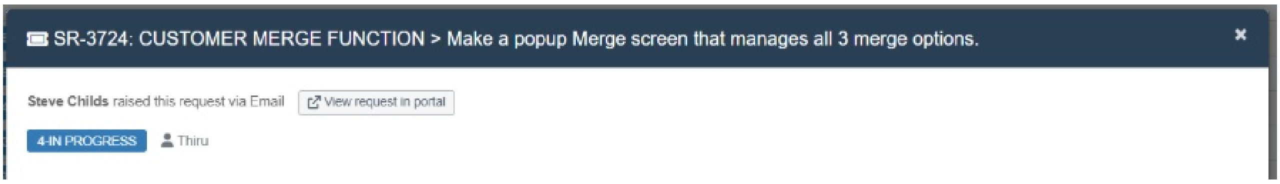
To view the details of a support request, click the **SR #** link from the Support Requests dashboard.


The Support Request Details window provides a complete view of the selected request, including the original submission, ticket status, attachments, history, comments, and work logs.




## Support Request Header

At the top of the window, users can view key information about the request, including:



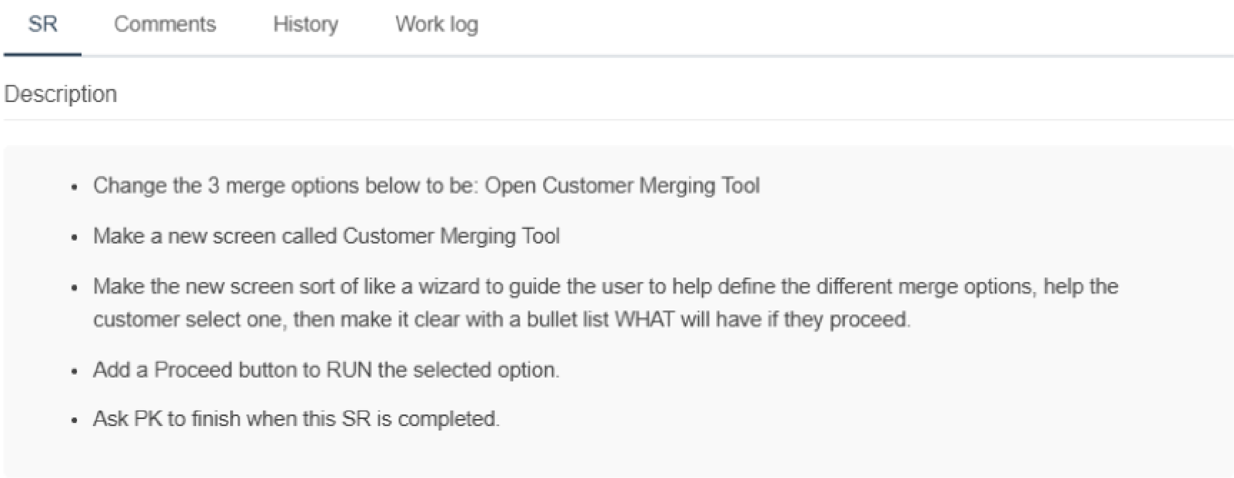

- Support Request Number (SR #)
- Request Summary
- Request Reporter
- Current Status
  - The current ticket status is displayed prominently, allowing users to quickly determine the progress of

the request.

- Developer/Support Assigned
- View Request in Portal
    - The View request in portal option opens the support request in the customer portal, providing access to additional request information and interactions when available.

## SR Tab

The **SR** tab displays the original support request submitted by the user.

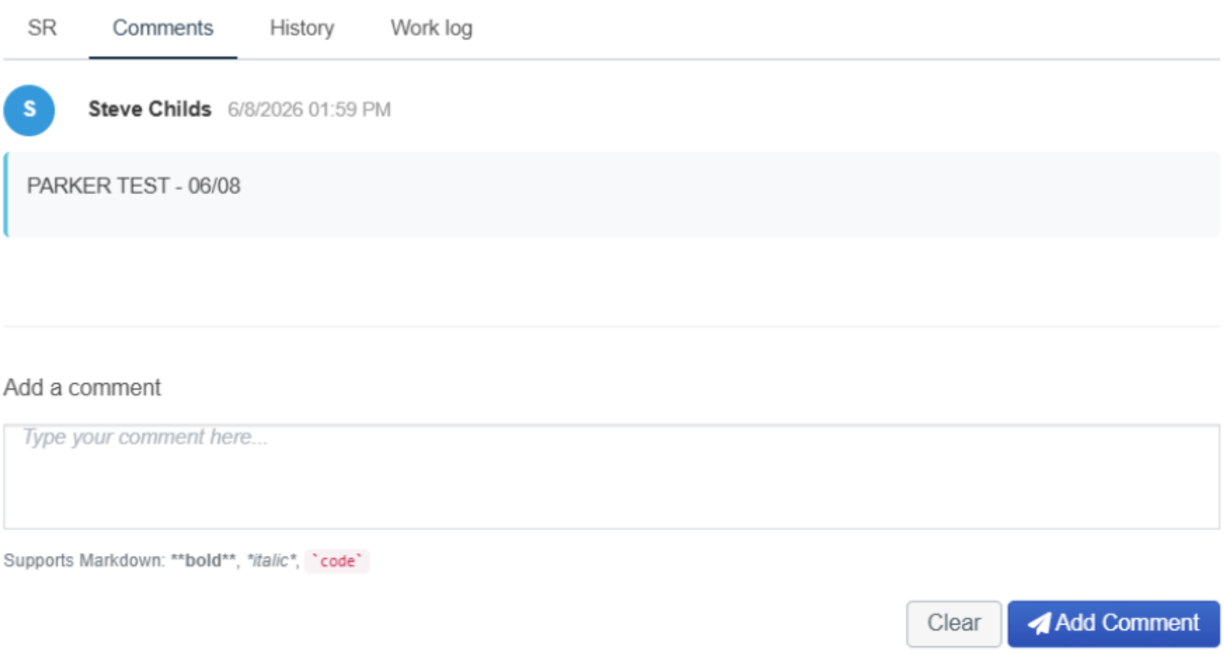



This tab includes:

- The request description.
- The original details provided during submission.
- Any supporting information included with the request.

## Comments Tab

The **Comments** tab provides a centralized conversation thread for the selected support request.




Users can review comments and updates related to the ticket, making it easy to follow discussions and stay informed about the progress of the request.

### Viewing Comments

Any comments added to the support request are displayed within the Comments tab, providing a chronological record of communication and updates related to the ticket.

This allows users to quickly review previous discussions without searching through email conversations.

### Adding Comments

Users can add comments directly from the Comments tab to provide updates or communicate with the support team.

To add a comment:

1. Open the support request.
2. Select the **Comments** tab.
3. Enter your message in the comment text box.
4. Click **Add Comment**.

The comment will be added to the support request and become part of the ticket's communication history.

Comments can be used to:

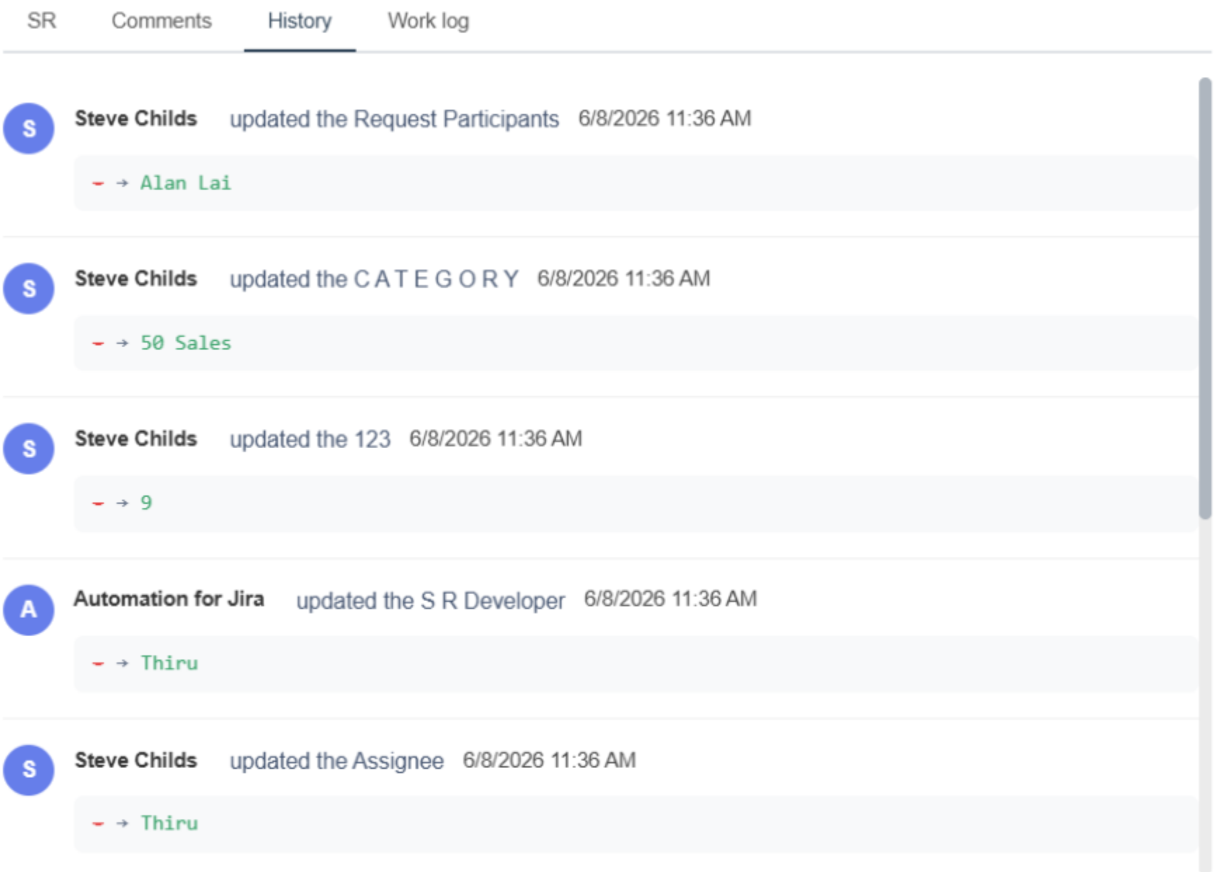
- Provide additional information about the request.
- Respond to questions from the support team.
- Share updates or new findings.
- Clarify requirements or expected outcomes.

### Benefits of Using Comments

Adding updates directly to the support request helps keep all communication associated with the ticket in one location. This provides better visibility for both your team and the support team while maintaining a complete history of the request.

## History Tab

The **History** tab provides a detailed record of activity and changes made to the support request throughout its lifecycle.




This tab allows users to track the progress of a request by viewing status updates, assignment changes, field modifications, attachments, and other ticket-related activities.

Each history entry includes:

- The user or system that made the change.
- The date and time the change occurred.
- The field or action that was updated.
- The previous value and the new value, when applicable.

### Types of Activities Displayed

The History tab may include activities such as:

- Status changes
- Assignee changes
- Manager or developer assignments
- Summary updates

- Attachment additions
- Request participant updates
- Other field modifications related to the support request

### Benefits of Using History

The History tab provides complete visibility into the progression of a support request by showing exactly what changes were made and when they occurred.

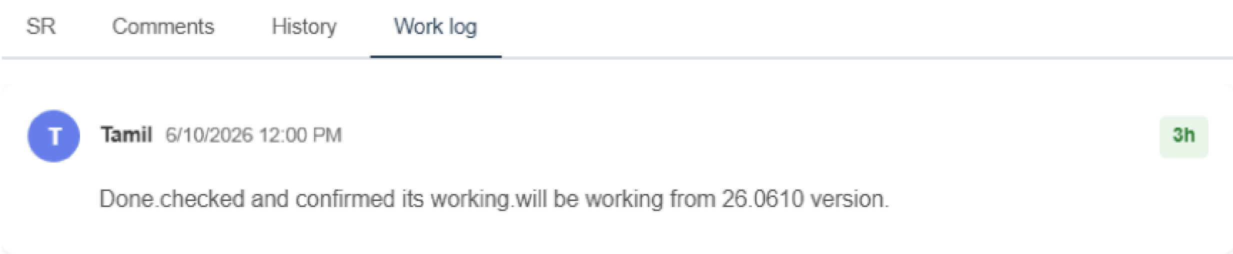
This information can be useful for:

- Tracking the progress of a request.
- Understanding changes made during the investigation process.
- Reviewing assignment and status updates.
- Identifying when files or information were added.
- Maintaining a complete audit trail of ticket activity.

Because all significant ticket updates are recorded, users can easily review the lifecycle of a support request from creation through resolution.

## Work Log Tab

The **Work Log** tab provides visibility into work performed on the support request by members of the support and development teams.




Each work log entry records the time spent on the request along with notes describing the work that was completed.

### Work Log Information

A work log entry may include:

- Team member name
- Date and time the work was logged
- Time spent on the task
- Progress notes or work performed

This allows users to better understand the activities being completed on their request and monitor ongoing progress.

### Benefits of Using Work Logs

Work logs provide additional transparency into the support process by showing the effort and progress associated with a support request.

Users can review work log entries to:

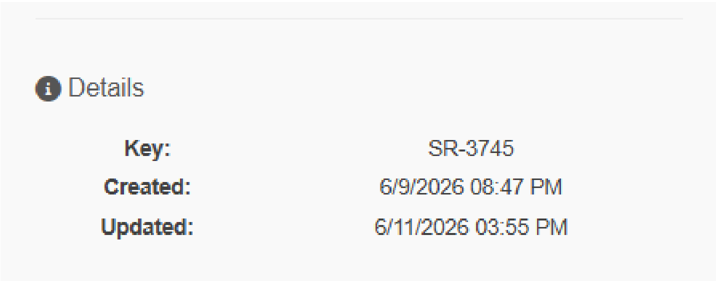
- Track progress on a request.
- View updates from support and development teams.
- Understand what work has been completed.
- Monitor ongoing investigation, development, or testing activities.

By providing visibility into work performed, the Work Log tab helps users stay informed throughout the lifecycle of their support request.

## Ticket Details

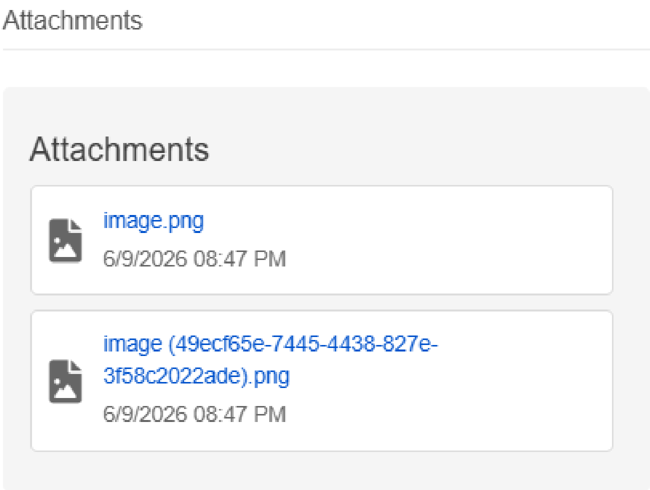
The Details panel provides additional information about the support request, including:

| Field | Description |
|---|---|
| **Key** | Unique identifier assigned to the support request. |
| **Created** | Date and time the support request was created. |
| **Updated** | Date and time of the most recent update to the support request |




## Attachments

Any files uploaded during ticket creation are displayed in the Attachments section.




Users can review and download supporting files such as:

- Screenshots
- Documents
- Spreadsheets
- Other supporting materials related to the request

Attachments provide additional context that may assist in understanding the request and tracking related information.

# Support Request Statuses

Each support request progresses through a series of statuses that indicate its current stage within the support process.

Understanding these statuses can help you track the progress of your requests and know what to expect next.

| Status | Description |
|---|---|
| **1-New** | The support request has been submitted and is awaiting review by the support team. |
| **2A-Design** | The request is being reviewed and evaluated to determine the appropriate solution, requirements, or approach. |
| **2B-Hold** | The request is currently on hold pending additional information, customer feedback, approval, or other dependencies. |
| **3-Assigned** | The support request has been assigned to a team member for further investigation or work. |
| **4-In Progress** | Active work is being performed on the support request. |
| **5A-Dev Review** | Development work has been completed and is currently under review before moving to testing. |
| **5B-Redo Dev** | Additional development work is required based on review findings, testing results, or requested changes. |
| **6-QA** | The request is undergoing quality assurance testing and validation. |
| **7-KBA / Rel Notes** | Documentation, knowledge base articles, or release notes are being prepared as part of the request completion process. |
| **8-Delivery To Customer** | The completed solution, update, or requested change has been delivered and is ready for customer review. |
| **9-Closed** | The support request has been completed and formally closed. |

## Tracking Request Progress

Users can view the current status of a support request from:

- The **Support Requests Dashboard**
- The **Support Request Details** window
- The **History** tab, which records status changes throughout the lifecycle of the request

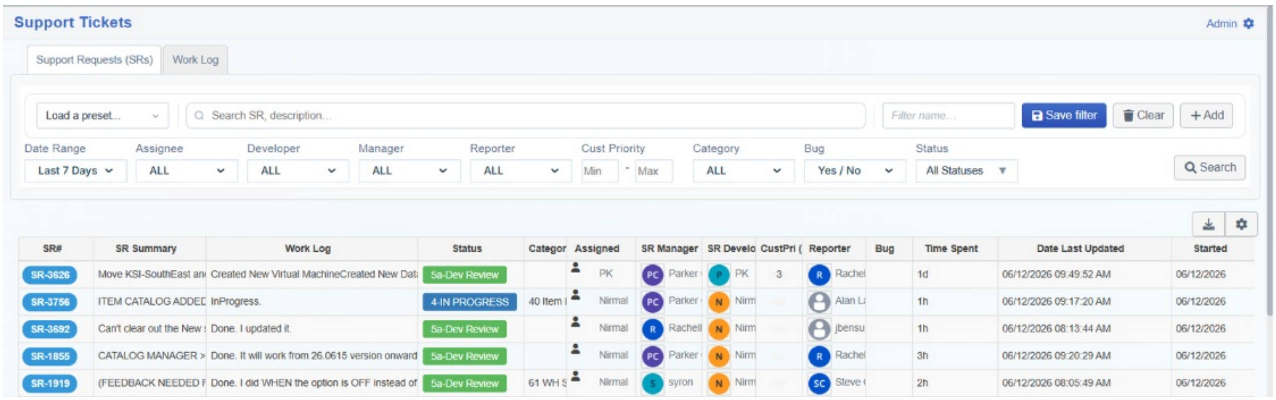
Status updates provide visibility into the progress of a request and help users understand where it is within the support process.

# Work Log Dashboard

The **Work Log** tab provides a centralized view of work logged against support requests associated with your company.

Unlike the **Support Requests** tab, which focuses on ticket management and status tracking, the Work Log tab focuses on work activity performed by the support and development teams.

This view allows users to quickly review work completed across multiple support requests without opening individual tickets.




# Work Log Information

The Work Log dashboard displays the following information:

| Column | Description |
|---|---|
| **SR #** | Unique support request number associated with the work log entry. |
| **SR Summary** | Summary of the support request. |
| **Work Log** | Description of the work performed. |
| **Status** | Current status of the support request. |
| **Category** | Classification of the support request. |
| **Assigned** | Current support team member assigned to the request. |
| **SR Manager** | Manager overseeing the support request. |
| **SR Developer** | Developer assigned to the request. |
| **CustPri** | Customer-defined priority level assigned to the request. |
| **Reporter** | User who submitted the support request. |
| **Bug** | Indicates whether the request has been identified as a software bug. |
| **Time Spent** | Amount of time logged against the work activity. |
| **Date Last Updated** | Most recent update date for the support request. |
| **Started** | Date and time the work activity began. |
| **Date Added** | Date and time the work log entry was recorded. |

# Search and Filters

The Work Log dashboard includes the same search and filtering capabilities available on the Support Requests tab.

Users can:

- Search by SR Number.
- Search using keywords related to support requests.
- Filter work log entries using available filter criteria.
- Save frequently used filters as company-specific preset filters.
- Clear active filters and return to the default view.

# Reviewing Work Activity

The Work Log dashboard is designed to provide visibility into work completed on support requests across your organization.

This view can be used to:

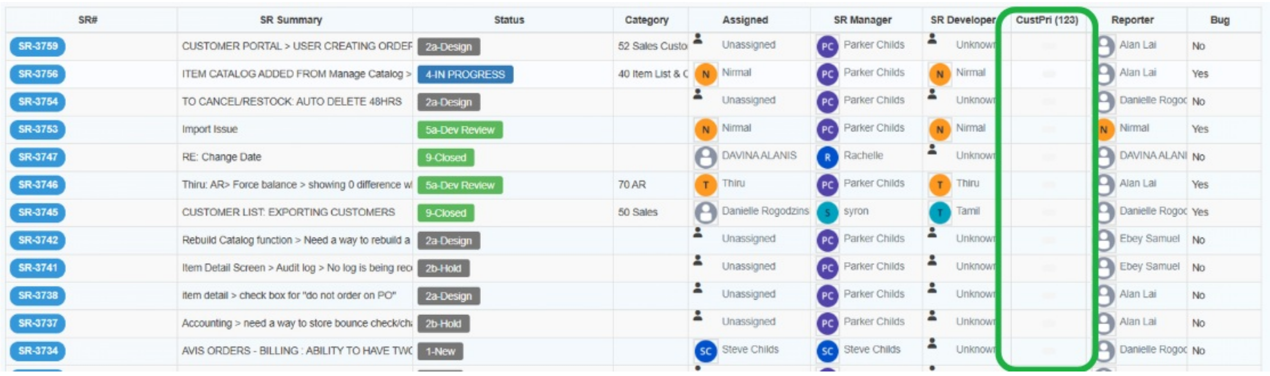
- Monitor work performed by support and development teams.
- Review progress across multiple support requests.
- Track time spent on support activities.
- Identify recently updated requests.

- Gain additional insight into ongoing and completed work.

## Note

Work log entries displayed in the Work Log dashboard are provided for visibility and reporting purposes. Individual work log records cannot be opened directly from this view.

# Customer Priority (CustPrio)



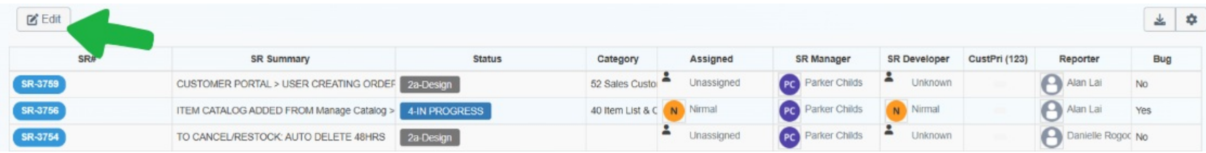

The **CustPrio** column allows your company to identify which support requests are most important to your business.

By assigning priority numbers to your support requests, you can help communicate which requests should receive the highest attention based on your organization's needs.

## Setting a Customer Priority

To update the priority of a support request:

1. Locate the support request in the Support Requests dashboard.
2. Click the **Edit** button located in the upper-left area of the grid.




3. Enter a priority number in the **CustPrio** field.
4. Save your changes.

## Priority Guidelines

Customer Priority values are user-defined and can be used to rank requests in order of importance.

For example:

| Priority | Description |
|---|---|
| 1 | Highest priority request |
| 2 | Second highest priority request |
| 3 | Third highest priority request |
| 4+ | Lower priority requests |

A lower number indicates a higher priority.

## Benefits of Customer Priority

Customer Priority helps your organization:

- Identify the most important support requests.
- Communicate business priorities more effectively.
- Organize requests based on urgency or impact.
- Maintain visibility into which issues require the most attention.

The Customer Priority value serves as a reference point when reviewing and managing support requests across your organization.

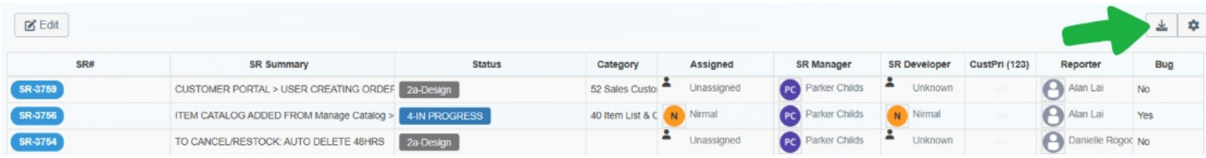
# Exporting Support Requests

Users can export the Support Requests grid to Microsoft Excel for reporting, analysis, or record-keeping purposes.

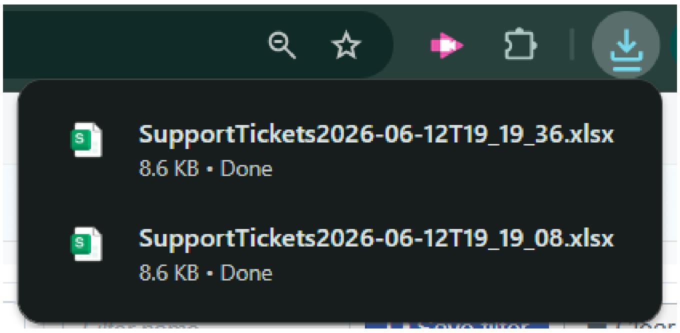
To export support requests:

1. Apply any desired search criteria or filters.

2. Click the **Download/Export** button located in the upper-right corner of the Support Requests dashboard.




3. An Excel file containing the displayed support request information will be generated and downloaded.

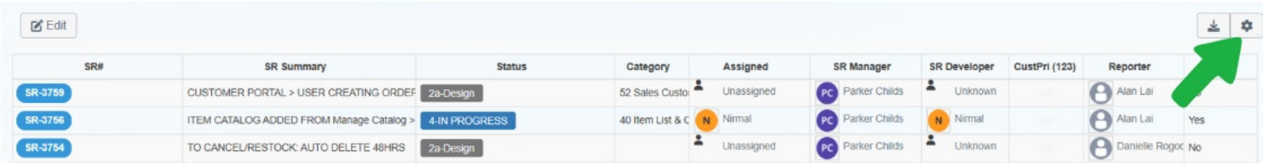



Exporting can be useful for:

- Reviewing support activity offline.
- Sharing ticket information with team members.
- Creating custom reports and analyses.
- Maintaining records of support requests.

# Dashboard Settings

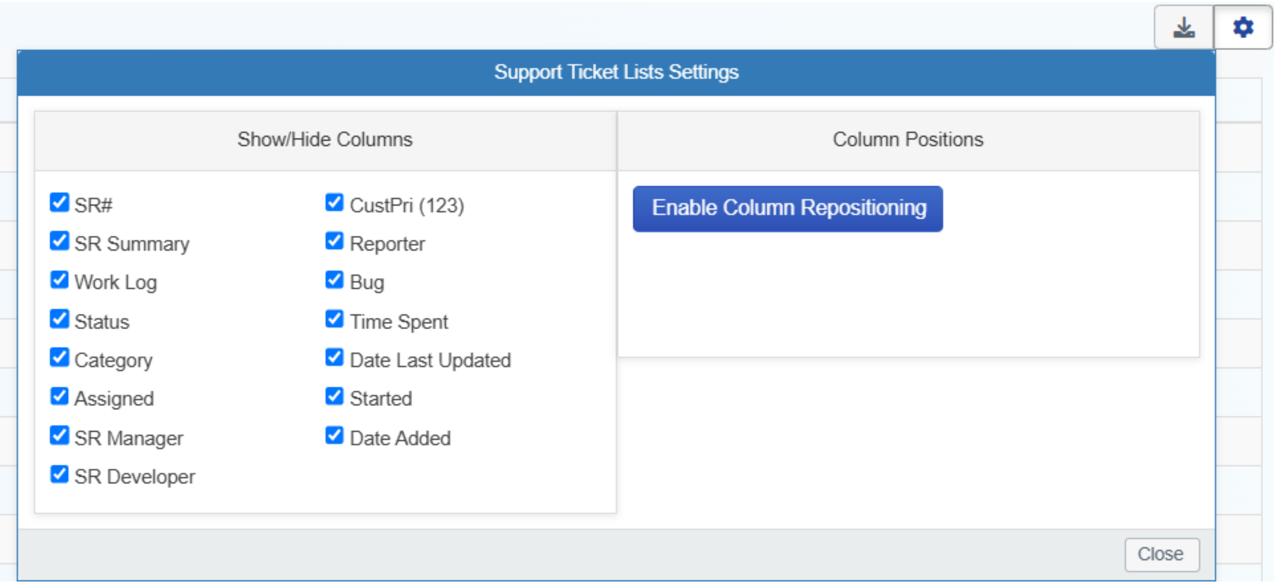
The **Settings** (gear icon) allows users to customize how information is displayed within the Support Requests dashboard.




Available options include:

### Show/Hide Columns

Users can select which columns are displayed within the grid, allowing them to focus on the information most relevant to their needs.




Examples include:

- SR #
- SR Summary
- Status
- Assigned
- SR Manager
- SR Developer
- Customer Priority
- Reporter
- Bug

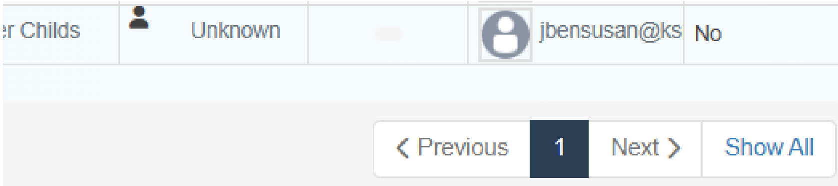
### Enable Column Repositioning

Users can enable column repositioning to rearrange the order of columns within the grid.
This allows users to customize the layout and place frequently referenced information in their preferred viewing order.

Dashboard settings help create a more personalized and efficient support ticket management experience.

## Navigating Results

The Support Requests dashboard includes pagination controls located at the bottom of the grid.




Users can navigate through support requests using:

- **Previous button**
- **Next button**
- **Individual page numbers**

These controls make it easy to browse large numbers of support requests while maintaining fast dashboard performance.

### Show All

The **Show All** option displays all available support requests within a single view.

This can be useful when:

- Reviewing all company support requests.
- Performing searches across a large data set.
- Exporting support request information.
- Conducting audits or reporting activities.

Depending on the number of support requests available, loading all records may take longer than viewing paginated results.