

TrackITS version 2

Preferences Tab—To Manage your User Preferences

Login

Use the following process to log into **TrackITS**:

1. Open an Internet application and go to the **TrackITS** homepage at:
<https://trackits.psu.edu>



Security verification may appear. Select Continue.

2. The Penn State Web Access **Authentication** screen appears. Enter your *Penn State user ID* and password and click **OK**. The TrackITS Welcome screen appears.



Penn State user ID should be “xyz5000” not “xyz5000@psu.edu”.

Preferences Tab

Use the following process to edit your User Preferences:

1. Click **Preferences**.

Proxy | Preferences | Help

2. Enter Email Address for Asset Tracking Notifications. (This is the email address to which your Asset Warranty/Maintenance expiration notifications will be sent.)

3. Click Send Email Updates to receive emails from the TrackITS system. (It is strongly recommended that you receive email notifications from the TrackITS system.)
4. Select desired Refresh Interval from the drop down.
5. Select Allow Proxy checkbox to allow other User(s) to proxy on your behalf.
6. Select User from *Select User to Proxy* (left-hand) column and move to the *Users Allowed to Proxy for You* (right-hand) column by using the five ‘shuttle’ controls located between the two columns.



You may wish to set up a Proxy to process your orders while you are on vacation.



Double-clicking a User name in one column will move it to the other column. You may also select multiple User names, and collectively move them from one column to the other.



Refresh—Resets the lists



Move all—Moves all items from *Select User to Proxy* to *Users Allowed to Proxy for You*.



Move Selected—Moves only selected items from *Select User to Proxy* to *Users Allowed to Proxy for You*.



Move Selected—Moves only selected from *Users Allowed to Proxy for You* to *Select User to Proxy*.



Move All—Moves all from *Users Allowed to Proxy for You* to *Select User to Proxy*.



Rules for Proxy Function

- *Users with only Requestor role cannot proxy*
 - *Approvers, Order Entry, and OK to Pay roles can proxy ONLY as other users who have at least one matching role, and have granted this user permission in their preferences.*
 - *Financial Support, and Financial Advisor roles can proxy as any user with no restrictions.*
 - *The roles of a proxying user are overwritten by the roles of the user for whom they are proxying.*
 - *Proxy cannot transfer Admin capabilities.*
7. Click Save Changes, or click Discard Changes without saving any changes.

Save Changes

Discard Changes

8. Click any other Main Menu Tab to leave the User Preferences interface.

Contact TrackITS

Contact for additional help:

- trackits@psu.edu