

Gaining Access to OpenTicket

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expand



Gaining Access to OpenTicket

- **Assumption:** You currently do not see the Ticket icon in OpenInvoice and need to add a role to access it. You do, however, have access to log in to OpenInvoice. If you do not have OpenInvoice access, please email supplierrelations@expandenergy.com.
- Navigate to **Membership > Departments & Roles**, then click the department name shown in blue.

The top screenshot shows the OpenInvoice dashboard. The 'Roles & Permissions (Legacy)' dropdown menu is open, showing options: Users, Permission Groups, and Manage Roles. The 'Manage Roles' option is highlighted. The dashboard also displays 'Invoices Requiring My Attention' (USD 0.00), 'Invoice Aging' (a bar chart showing age groups and amounts), and 'Approved Invoices' (a list of invoices with amounts and dates).

The bottom screenshot shows the 'Roles and Permissions (Legacy)' page. A message at the top states: 'This screen will be removed in a future release. Roles will be managed from Manage Roles.' Below this is a table with columns: Name, Type, Description, Notification User, Remit To, and Delete. The table contains one row for 'Expend Test Supplier 1' with a sub-row for 'Oklahoma City' and a sub-row for 'Accounts Receivable' (highlighted in blue). The 'Accounts Receivable' row has a 'Department' field set to 'Admin, OpenInvoice'.

Name	Type	Description	Notification User	Remit To	Delete
Expend Test Supplier 1					
Oklahoma City	Site				
Accounts Receivable	Department		Admin, OpenInvoice		

Gaining Access to OpenTicket (continued)

- On the next screen, click **Add Role**.

OpenInvoice

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Role Configuration

This site currently has 2 invoices in progress.

Add Role

Organization Roles

	Membership View	Membership Modify	Membership Admin	Corporate View	Corporate Modify	Corporate Admin	Corporate Integration	Invoice View	Invoice Modify	Invoice Admin	Price Book View	Price Book Modify	Price Book Approve	Field Ticket View	Field Ticket Modify	Field Ticket Create Restricted	Field Ticket Pricing	Payment Admin	PO View	PO Admin	PO Close	Job Order View	Job Order Admin	Job Order Close
Expand Test Supplier 1																								
Oklahoma City																								
Accounts Receivable																								
Member (2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company Setup and Admin (2)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Create Invoices (1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create Tickets (1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anderson, Zack																								
Manage PriceBooks (1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View Invoices (1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View Tickets (1)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Submit

Cancel

Gaining Access to OpenTicket (continued)

- Enter **Field Ticket** in the **Role Name** field.
- Select the **users** who need access to this role.
- Click **Add** and click **Submit**.

The screenshot displays the 'Role Configuration' page in the OpenInvoice system. The interface includes a top navigation bar with the 'OpenInvoice' logo, a 'UAT - TEST' status indicator, and a 'Fund my Invoice' button. A search bar and user profile icon are also present. The main content area shows a 'Role Configuration' form with the following fields and elements:

- Department Name:** Accounts Receivable
- Role Name:** Field Ticket
- Description:** (empty field)
- Active:** ☒
- Non-Members:** A list containing 'Admin, OpenInvoice'.
- Members:** (empty list)
- Buttons:** 'Add >' and '< Remove' buttons are located between the Non-Members and Members lists.
- Footer:** 'Submit' and 'Cancel' buttons.

Red boxes highlight the 'Role Name' field, the 'Non-Members' list, the 'Add >' button, and the 'Submit' button, indicating the steps to be followed.

Gaining Access to OpenTicket (continued)

- Ensure that all personnel submitting tickets are assigned to the new role.
- In the row for the new **Field Ticket** role, check the boxes under the three Field Ticket permission columns (**Field Ticket View**, **Field Ticket Modify** and **Field Ticket Pricing**), then click **Submit**.

OpenInvoice UAT - TEST Fund my Invoice Invoice # Search ? User Logout

Back Role Configuration Expand Test Supplier 1

This site currently has 2 invoices in progress.

Add Role

Organization Roles

	Membership View	Membership Modify	Membership Admin	Corporate View	Corporate Modify	Corporate Admin	Corporate Integration	Invoice View	Invoice Modify	Invoice Admin	Price Book View	Price Book Modify	Price Book Approve	Field Ticket View	Field Ticket Modify	Field Ticket Create Restricted	Field Ticket Pricing	Payment Admin	PO View	PO Admin	PO Close	Job Order View	Job Order Admin	Job Order Close
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Manage PriceBooks (1)																								
View Invoices (1)																								
View Tickets (1)																								

Submit Cancel

Gaining Access to OpenTicket (continued)

- Log out and then log back in for the changes to take effect.
- The **OpenTicket** icon should now be visible.
- Still having issues? Email Eticket@expandenergy.com for assistance.

