

## HR SERVICE CATALOG

### HR Service Request Portal

The HR Service Request Portal is an online ticketing system used by Human Resources to provide customer support. UCR faculty and staff can use the service to submit a request for:

1. **Communication & Design**
2. **Covered Services**
3. **EOD - Special Training**
4. **ePer and Performance Development**
5. **HR Admin - Catastrophic Donation**
6. **HR Admin - Catastrophic Leave**
7. **HR Admin - Rehired Retiree**
8. **HR Policy Request**
9. **HR Systems and Project Management**

An email notification will be sent to the **Request Form owner** when a Request is submitted.

The screenshot shows the HR Service Catalog interface. At the top, there is a navigation bar with 'ITS HOME', 'SYSTEM STATUS', 'MY DASHBOARD', and a user profile for 'DORA RUBIO'. Below the navigation bar is a search bar labeled 'Search the Service Catalog'. On the left side, there is a 'Catalogs' dropdown menu with 'Human Resources Catalog' selected, and a 'Categories' list with items like 'Employee Organizational Develo...', 'HR Administration', and 'Policy & Strategic Initiatives'. The main content area is titled 'Service Catalog' and displays a grid of service items, each with a 'View Details' link and a red circular callout number (1-9) corresponding to the list on the left. The items are: 1. Communication & Design; 2. Covered Services; 3. EOD -Special Training Requests; 4. ePer and Performance Development; 5. HR ADMIN - CAT Donation; 6. HR ADMIN - CAT Leave; 7. HR ADMIN - Rehired Retiree; 8. HR Policy Request; 9. HR Systems and Project Management.

## REQUESTED ITEMS LIST VIEW

The ticketing system's **Requested Items List** view page allows for the tracking of all Requests in a central location.

Information available here includes:

1. List **Columns** (will vary):
  - **Number** (RITM#)
  - **Item** (Request Form name)
  - **Requested For**
  - **Opened By**
  - **Assigned To**
  - **Opened**
  - **State**
2. Column **Filter Search** fields
3. Requested **Items List**
4. Requested Items **Search** field
5. List view **Favorites** icon
6. Personalize **List Column Preferences** icon

The screenshot shows the 'Requested Items' list view in the UC Riverside system. The interface includes a search bar at the top right, a filter dropdown menu, and a table of request items. Red callouts are placed over the interface to identify specific features: 1 points to the filter dropdown, 2 points to the table header, 3 points to the table body, 4 points to the search input field, 5 points to the favorites icon, and 6 points to the list column preferences icon.

Number	Item	Requested for	Opened by	Assigned to	Opened	State
RITM0256587	HR Systems and Project Management	Kitty Phan-Perkins	Dora Rubio	Dora Rubio	10/21/24 11:17:45	Open
RITM0256559	HR Policy Request	Mary White	Mary White	(empty)	10/15/24 09:09:27	Open
RITM0256558	HR Policy Request	Mary White	Mary White	(empty)	10/15/24 09:09:02	Open
RITM0256557	HR Policy Request	Mary White	Mary White	(empty)	10/15/24 09:08:30	Open
RITM0256556	HR ADMIN - CAT Donation	Dora Rubio	Dora Rubio	(empty)	10/14/24 16:47:19	Open
RITM0256554	HR Policy Request	Dora Rubio	Dora Rubio	(empty)	10/14/24 12:21:59	Open
RITM0256546	HR ADMIN - CAT Leave	Judy Abbey	Judy Abbey	(empty)	10/10/24 16:55:26	Open
RITM0256545	HR ADMIN - Rehired Retiree	Judy Abbey	Judy Abbey	(empty)	10/10/24 16:53:36	Open

**NOTE:** List Columns displayed will differ depending on individual preferences.

## REQUESTED ITEMS LIST VIEW

7. Once the request form is submitted, a **Request Item Number (RITM#)** is assigned to the Request. Click the **RITM#** to open a detailed view of the Request.
8. The **Item** column identifies the **Request Form** submitted.
9. Next, in the **Requested For** column, name of individual Request was submitted on behalf of will display.
10. In the **Opened By** column, the name of Requestor will also display.
11. Under the the **Assigned to** column, double click the empty field to assign an individual to mange the request.
12. Date request was opened will display in the **Opened** column.
13. The current state of the Request can be updated in the **State** column:

- Pending
- Open
- Work in Progress
- Closed Complete
- Closed Incomplete
- Closed Skipped

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RITM0256559	HR Policy Request	Mary White	Mary White	(empty)	10/15/24 09:09:27	Open
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RITM0256557	HR Policy Request	Mary White	Mary White	(empty)	10/15/24 09:08:30	Open
RITM0256556	HR ADMIN - CAT Donation	Dora Rubio	Dora Rubio	(empty)	10/14/24 16:47:19	Open
RITM0256554	HR Policy Request	Dora Rubio	Dora Rubio	(empty)	10/14/24 12:21:59	Open
RITM0256546	HR ADMIN - CAT Leave	Judy Abbey	Judy Abbey	(empty)	10/10/24 16:55:26	Open

**NOTE:** List Columns displayed will differ depending on individual preferences.

## REQUEST DETAILED VIEW

From the **Requested Items** list view, clicking any of the **RITM#’s** will open a detailed view of the Request.

1. The top of the form contains some basic information about the request.
2. Click the **Assigned To** field to assign an individual to manage this Request. An email notification will be sent.
3. Click the **Save** button to save information entered, changes made or activities performed.
4. The next section displays the Requestor information and details of the **Request Form**.

**Note:** Additional fields will display for specific forms (e.g. EOD, Policy & HR Systems). If necessary, Information will be manually entered into these fields by the workgroup.

The screenshot displays the 'Requested Item - RITM0256587' detailed view. The interface includes a top navigation bar with 'UC RIVERSIDE', 'All', 'Favorites', and a search bar. Below the navigation bar, there are buttons for 'Discuss', 'Follow', 'Update', and 'Save'. The main form is divided into two columns. The left column contains fields for 'Number' (RITM0256587), 'Item' (HR Systems and Project Management), 'Opened by' (Dora Rubio), 'Requested for' (Kitty Phan-Perkins), 'Opened' (10/21/24 11:17:45), 'Updated by' (system), 'State' (Open), and 'Created' (10/21/24 11:17:45). The right column contains fields for 'Assignment group', 'Assigned to' (Dora Rubio), 'Request' (REQ0247971), 'Stage' (SLA on request completion to submitter), 'Short description', and 'Description'. Below the main form, there is a section for 'Requestor' information, including 'Requestor' (Kitty Phan-Perkins), 'First Name' (Kitty), 'Email' (kitty.phanperkins@ucr.edu), 'Work Phone', 'Employee ID' (10730198), 'NetID' (kittyp), 'Last Name' (Phan-Perkins), 'Department' (D01103), and 'Organization' (ORG20). There is also a 'Sub type' dropdown menu set to 'Backlog items' and an 'Assigned to' field.

## REQUEST DETAILED VIEW

5. Use the **Watch List** option to allow additional individuals visibility of this request. Click the **Save** button to save the Watch list.
6. In the **Work Notes** field enter notes regarding this Request, then click the **Post** button. Notes will only be visible to users assigned to this Request.
7. Enter comments in the **Additional Comments** field to communicate with the Requestor (customer) and all individuals in the Watch List, then click the **Post** button to send the comments.
8. The **Activities Log** section displays all activities related to the Request such as:
  - [System email notifications](#)
  - [Assigned To](#)
  - [State updates](#)
  - [Work Notes posted](#)
  - [Additional Comments posted](#)

**NOTE: Click the Save button to save Watch List**

The screenshot shows the 'REQUEST DETAILED VIEW' interface. At the top, there are buttons for 'Discuss', 'Follow', 'Update', and 'Save'. The 'Save' button is highlighted with a red box and a blue callout box pointing to it. Below this, there are two sections: 'Watch list' and 'Work notes list'. The 'Watch list' section has a red circle '5' next to it. The 'Work notes list' section has a red circle '6' next to the 'Work notes' input field. Below the 'Work notes' field is the 'Additional comments (Customer visible)' field, which has a red circle '7' next to it. To the right of this field is a 'Post' button, which is highlighted with a red box and a blue callout box pointing to it. Below the 'Additional comments' field is the 'Activities: 2' section, which has a red circle '8' next to it. The 'Activities' section shows two entries: 'System' and 'MW Mary White'. The 'System' entry shows an email sent on 10/15/24 09:08:49 with the subject 'Request RITM0256557 has been opened on your behalf'. The 'MW Mary White' entry shows field changes on 10/15/24 09:08:30 with details: Impact 3 - Low, Opened by Mary White, Priority 4 - Low, and State Open.

**NOTE: Click the Post button to save Work Notes and Additional Comments.**

## MANAGING REQUEST TASKS

Below the Activities Log is the **Tasks** section.

9. The first tab is the **Catalog Tasks** which displays the list of tasks that must be completed for the Request.
10. Click a **Task Number** to go into a detailed task view similar to the RITM detailed view.
11. Double click the **Assigned To** field to assign individual responsible for completing this task.
12. To update the state of a task, double click the **State** field, then select one of the options:
  - Pending
  - Open
  - Work in Progress
  - Closed Complete
  - Closed Incomplete
  - Closed Skipped
13. Next, click the **Green Checkmark** to save the Task State.
14. Finally click the **Save** button, to save the Request update.

The screenshot shows a web interface for managing request tasks. At the top right, there are buttons for 'Discuss', 'Follow', 'Update', and 'Save' (labeled 14). Below these are tabs for 'Catalog Tasks (4)', 'Approvers', 'Group approvals', 'Audit History (53)', 'Change Tasks', 'Projects', and 'Change Requests'. A search bar and a 'State' dropdown menu are visible. The main table lists tasks with columns for 'Number', 'Short description', 'Created', 'Assignment group', 'Assigned to', 'Stage', and 'State'. The 'Assigned to' column (labeled 11) shows '(empty)', 'Mary White', and 'Dora Rubio'. The 'State' column (labeled 12) shows 'Open', 'Closed Complete', 'Closed Complete', and 'Closed Complete'. A dropdown menu for the 'State' field is open, showing options: 'Open', 'Pending', 'Work in Progress', 'Closed Complete', 'Closed Incomplete', and 'Closed Skipped'. A blue callout box (labeled 13) points to the 'Closed Complete' option with the text: 'NOTE: Choosing the Closed Complete option on the last task will close the Request.'

Number	Short description	Created	Assignment group	Assigned to	Stage	State
SCTASK0459291	Respond - Provide SLA on request completion to submitter	10/28/24 13:35:12	Policy Request	(empty)	[Progress Indicators]	Open
SCTASK0459261	Review request	10/21/24 11:17:50	Policy Request	Mary White	[Progress Indicators]	Closed Complete
SCTASK0459280	Assign request	10/23/24 16:40:48	Policy Request	Dora Rubio	[Progress Indicators]	Closed Complete
SCTASK0459290	Acknowledge request has been reviewed	10/28/24 13:32:15	Policy Request	(empty)	[Progress Indicators]	Closed Complete

**NOTE:** Choosing the **Closed Complete** option on the last task will close the Request.

## MANAGING REQUEST APPROVALS

**NOTE:** Approval Request will be triggered by specific forms.

1. The second tab in the Tasks section is the **Approvers tab**.
2. The Approvers tab will list the **Requested Approvals** necessary to complete a Request.
3. An **email notification** will be sent to the Approver with links to approve or reject the Requested Item (RITM).
4. To approve or reject the request, from the email notification, click the **Approve or Reject link**.
5. The Approval Request screen will open, select the **Approve or Reject** button at the top of the page.
6. Alternatively, from the Approvers Tab, right click the **Requested** link and select **Approve or Reject**.
7. The state of the task will change to **Approved** and the last task for the Request will open.

State	Created	Approver	Email	Opened by	Email	Requested for
Requested	10/31/24 13:16:46	Mary White	mary.white@ucr.edu	Dora Rubio	dora.rubio@ucr.edu	Dora Rubio

- Show Matching
- Filter Out
- Copy URL to Clipboard
- Copy sys\_id
- Assign Tag >
- Approve
- Reject

Dear Mary White,

Requested Item RITM0256507 is pending your approval.

Requested Item: HR Policy Request  
Approver Name: Mary White  
Opened on: 10/31/24 13:16:46 PDT

Approval Activity:  
You are the sole approver.

Click [here](#) to approve RITM0256507  
Click [here](#) to reject RITM0256507

Click [here](#) to view Approval Request

Thank you,  
Information Technology Solutions

Approval Requested Item: RITM0256640

Approver: Mary White  
State: Requested  
Created by: system

Summary of Item being approved:  
Description: To submit requests for Policy & Strategic Initiatives, Communication/Design

Comments: Comments

State	Created	Approver	Email	Opened by
Approved	10/08/24 12:01:07	Mary White	mary.white@ucr.edu	Dora Rubio