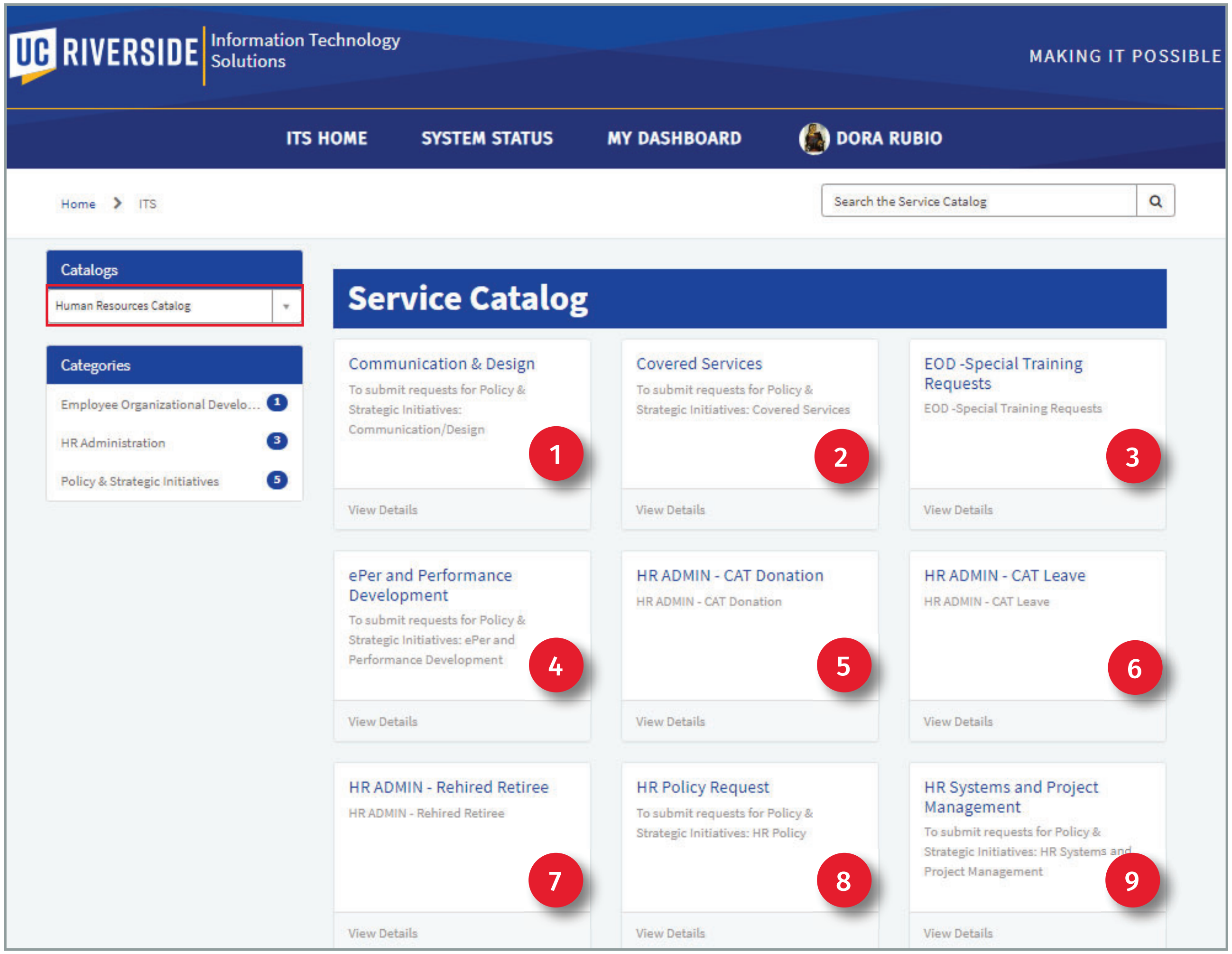
HR SERVICE CATALOG

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.



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. Personlize **List Column Preferences** icon

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

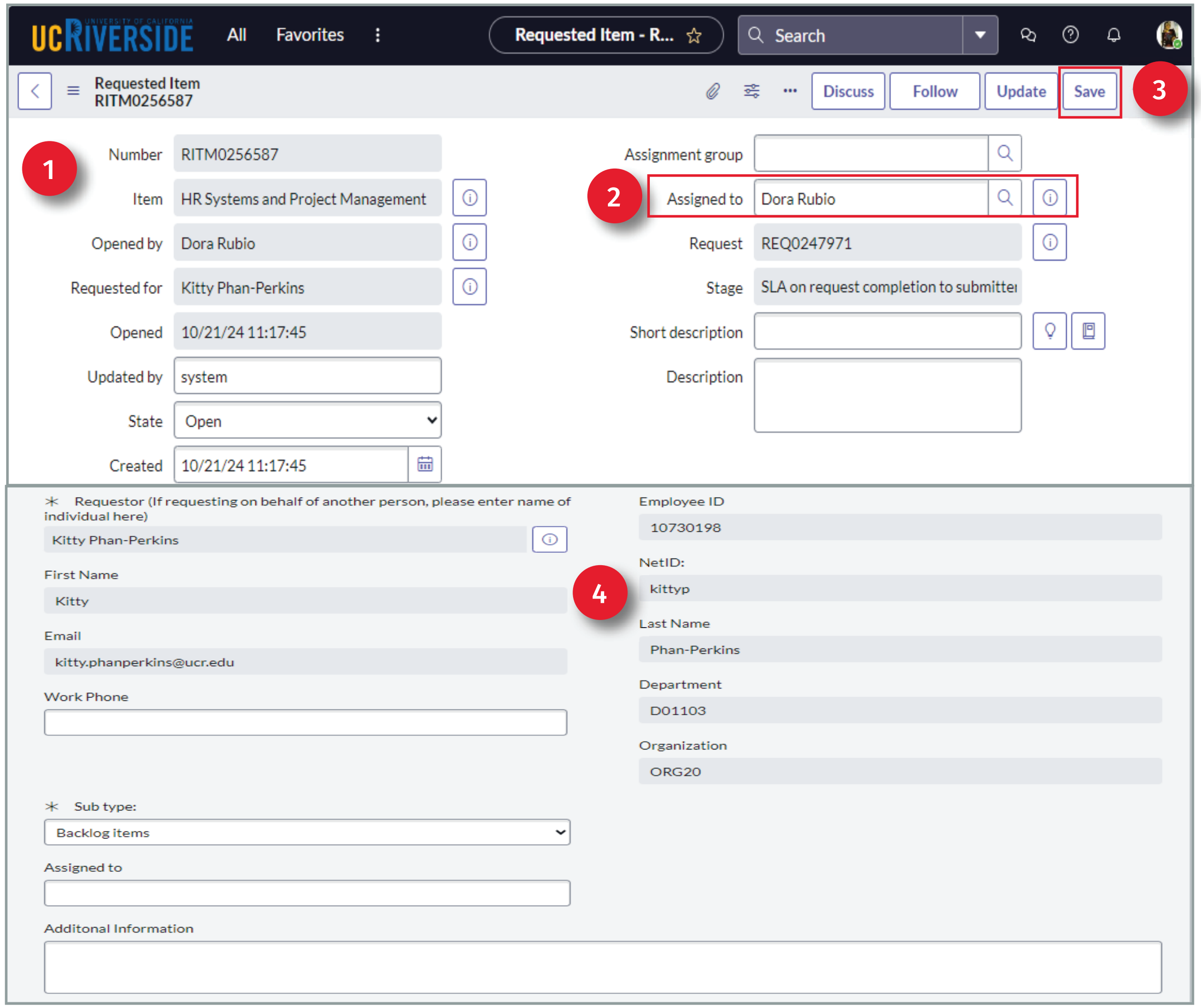
NOTE: List Columns displayed will differ depending on individual preferences.

REQUEST DETAILED VIEW

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

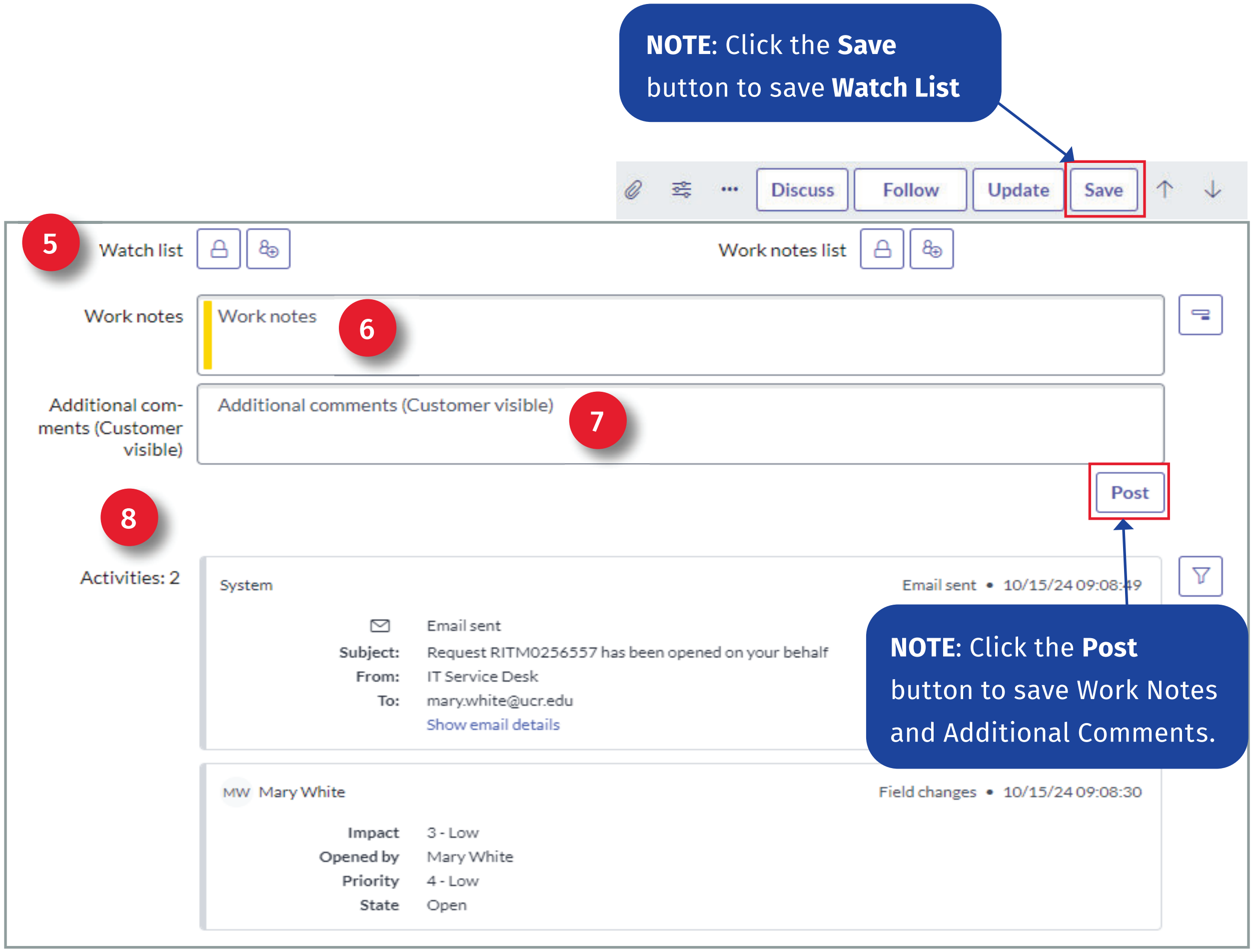
1. The top of the form contains some basic information about the request.
2. Click the **Assigned To** field to assign an individual to manage this Request. An email notification will be sent.
3. Click the **Save** button to save information entered, changes made or activities performed.
4. The next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



REQUEST DETAILED VIEW

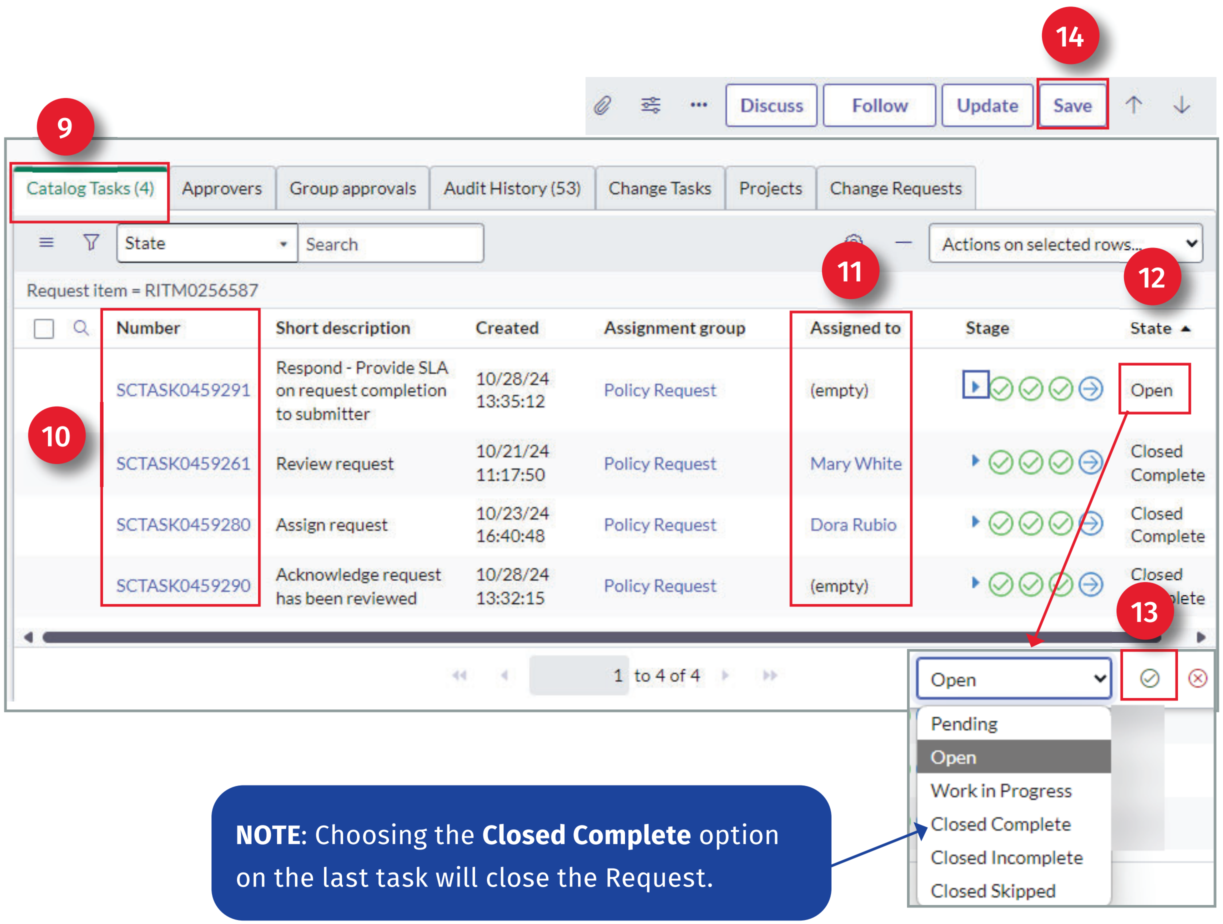
5. Use the **Watch List** option to allow additional individuals visibility of this request. Click the **Save** button to save the Watch list.
6. In the **Work Notes** field enter notes regarding this Request, then click the **Post** button. Notes will only be visible to users assigned to this Request.
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



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.



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.