

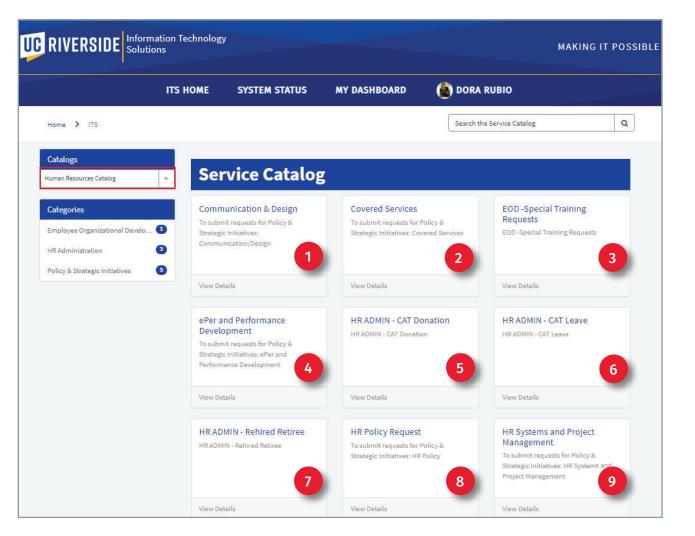
## **HR SERVICE CATALOG**

#### **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.



#### Human Resources Servicelink Requests



#### **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

	Requested Items Number - Search 4 r 💿			6 ns on selected rows		
Name starts with Number 🔻	HR Item	Requested for	Opened by	Assigned to	Opened	State
Search	HR	Search	Search	Search	Search	Sea
RITM0256587	HR Systems and Project Management	Kitty Phan-Perkins	Dora Rubio	Dora Rubio	10/21/24 11:17:45	Ope
RITM0256559	HR Policy Request	Mary White	Mary White	(empty)	10/15/24 09:09:27	Ope
RITM0256558	HR Policy Request	Mary White	Mary White	(empty)	10/15/24 09:09:02	Ope
RITM0256557	HR Policy Request	Mary White	Mary White	(empty)	10/15/24 09:08:30	Ope
RITM0256556	HR ADMIN - CAT Donation	Dora Rubio	Dora Rubio	(empty)	10/14/24 16:47:19	Ope
RITM0256554	HR Policy Request	Dora Rubio	Dora Rubio	(empty)	10/14/24 12:21:59	Ope
RITM0256546	HR ADMIN - CAT Leave	Judy Abbey	Judy Abbey	(empty)	10/10/24 16:55:26	Ope
RITM0256545	HR ADMIN - Rehired Retiree	Judy Abbey	Judy Abbey	(empty)	10/10/24 16:53:36	Ope

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



### **REQUESTED ITEMS LIST VIEW**

- 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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Q	Number 🔻	Item	Requested for	Opened by	Assigned to	Opened	State
	Search	HR	Search	Search	Search	Search	Searc
	RITM0256587	HR Systems and Project Management	Kitty Phan-Perkins	Dora Rubio	Dora Rubio	11:17:45	Open Pending Open
	RITM0256559	HR Policy Request	Mary White	Mary White	(empty)	10/15/24 V 09:09:27	Vork in Progres Closed Complet
7	RITM0256558	HR Policy Request	Mary White	Mary White	(empty)	A contract of the second second second second	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	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.

- 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**.

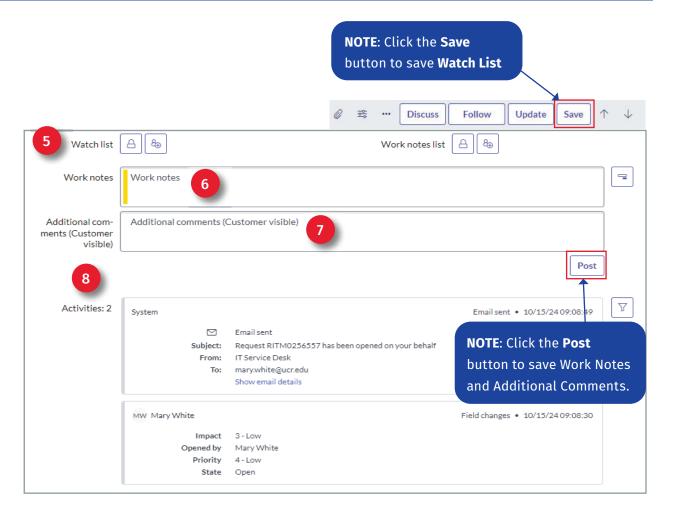
**Note:** Additional fields will display for specific forms (e.g. EOD, Policy & HR Systems). If necessary, Information will be manually entered into these fields by the workgroup.

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	ltem 587		0 2	😋 🚥 Discuss Follo	w Update Save 3
Number	RITM0256587		Assignment group		Q
Item	HR Systems and Project Management	()	2 Assigned to	Dora Rubio	Q (1)
Opened by	Dora Rubio	(i)	Request	REQ0247971	$\bigcirc$
Requested for	Kitty Phan-Perkins	(i)	Stage	SLA on request completion to	o submitter
Opened	10/21/24 11:17:45		Short description		Q []
Updated by	system		Description		
State	Open 🗸				
Created	10/21/24 11:17:45				
★ Requestor (If r individual here)	equesting on behalf of another person, p	ease enter name of			
Kitty Phan-Perkins			10730198		
First Name			NetID:		
Kitty			4 kittyp		
Email			Last Name Phan-Perkins		
kitty.phanperkins	@ucr.edu				
Work Phone			Department D01103		
			Organization ORG20		
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* Sub type: Backlog items		~			
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Assigned to					
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# **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



#### Human Resources Servicelink Requests



#### HR STAFF

#### 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.

Catalog T	asks (4) Approvers	Group approvals Au	udit History (53)	Change Tasks Project	cts Change Rec	juests	
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	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)		Open
10	SCTASK0459261	Review request	10/21/24 11:17:50	Policy Request	Mary White	►⊘⊘⊘€	Close Comp
	SCTASK0459280	Assign request	10/23/24 16:40:48	Policy Request	Dora Rubio	•000	Close Comp
	SCTASK0459290	Acknowledge request has been reviewed	10/28/24 13:32:15	Policy Request	(empty)	•0000	Close
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						Pending Open	

Human Resources Servicelink Requests



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## Human Resources Service Requests

### **MANAGING REQUEST APPROVALS**

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.

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

