



California
DEPARTMENT OF TECHNOLOGY
Office of Technology Services

Service Request Fulfillment Training How to Search Within SRM

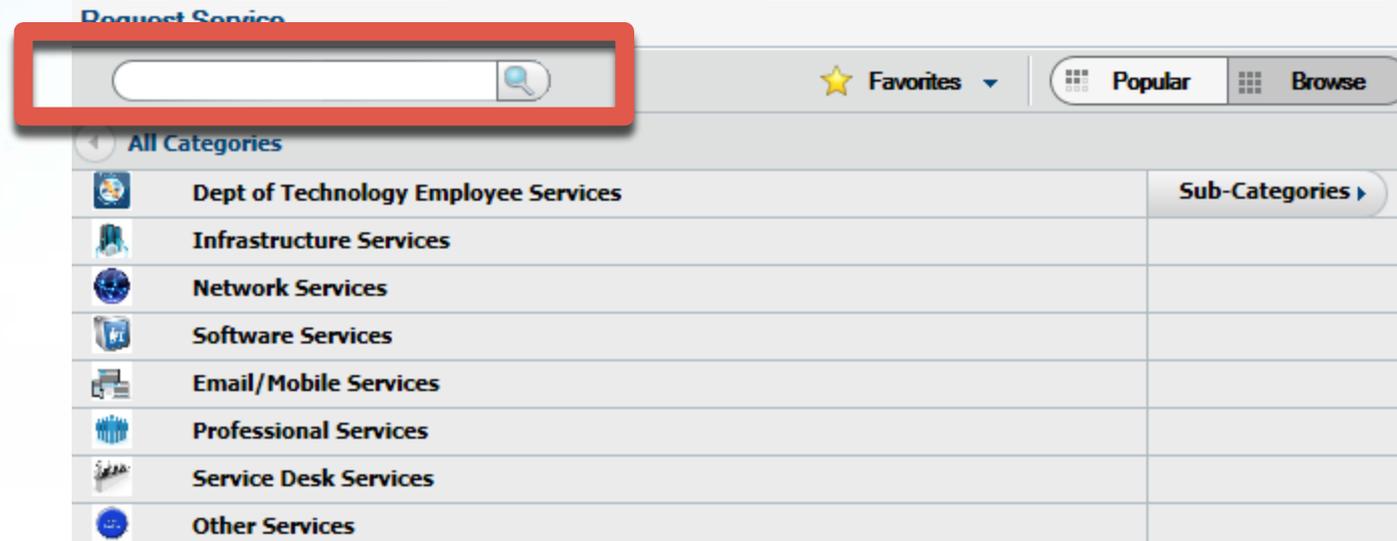
Date: 12/22/15

Module Objectives

- **Lesson 1:** How to Search for Forms
- **Lesson 2:** How to Search for Your Own Service Requests
- **Lesson 3:** How to Search for your Department's Service Requests
- **Lesson 4:** How to Search for Someone Else's Service Requests

Lesson 1

How to Search for Forms



When first logging into the SRM application, the amount of Categories to search through can seem overwhelming. You can simplify your efforts by using the Search field located above the list of categories.

Lesson 1

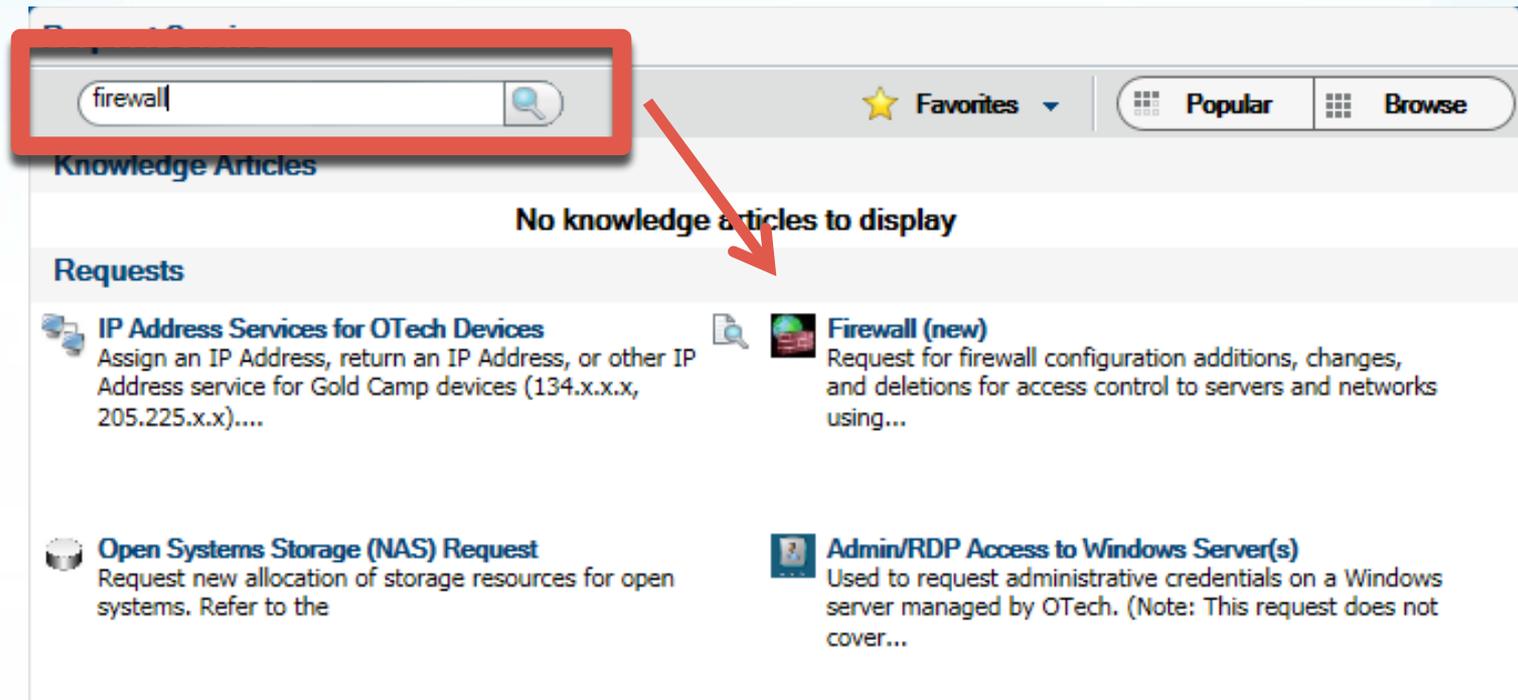
How to Search for Forms

The screenshot shows a web interface titled "Request Service". At the top, there is a search bar containing the text "firewall". Below the search bar is a dropdown menu with the following suggestions: "firewall request", "firewall request form", "firewall request firewall", "firewall change request", "firewall (new)", "firewall config", "firewall modification form", "firewall form", and "firewall poorts". To the right of the search bar are buttons for "Favorites", "Popular", and "Browse". Below the search bar is a table with columns "Service Categories" and "Sub-Categories". The table lists three categories: "Professional Services", "Service Desk Services", and "Other Services". A red callout box points to the dropdown menu with the text "Search result window".

The *Search* field enables users to find matching requests using the type-ahead functionality. When a user begins to type in the *Search* field, the application displays suggestions in a type-ahead list below the *Search* field.

Lesson 1

How to Search for Forms



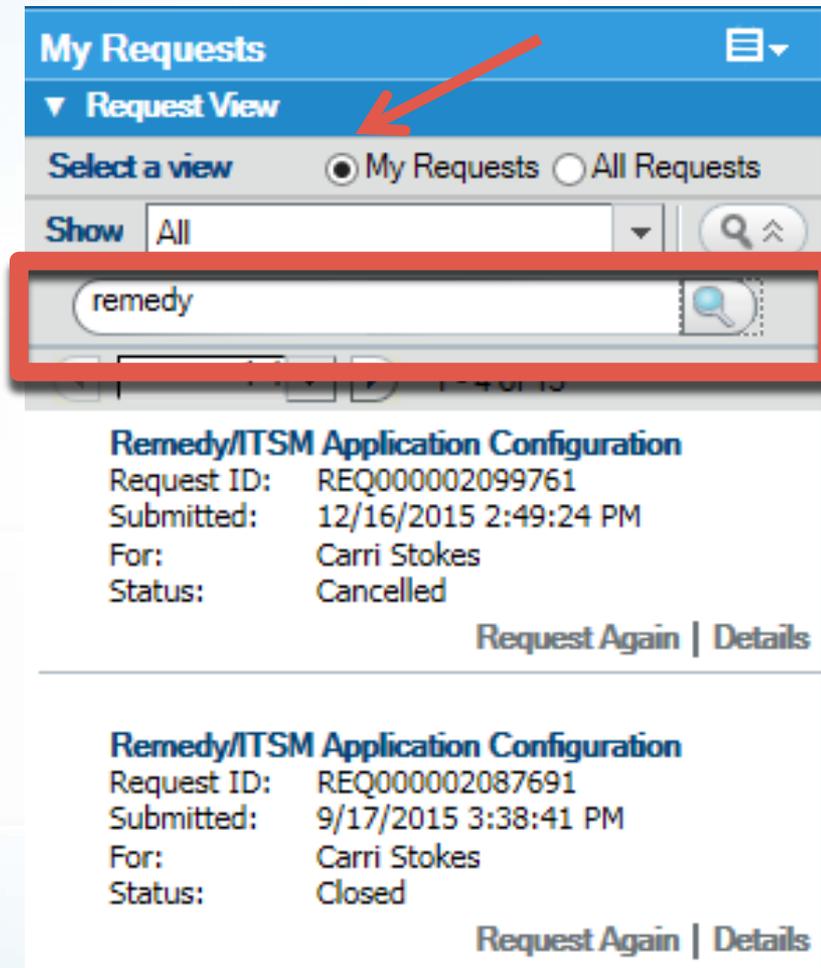
The screenshot shows a search interface. At the top, there is a search bar containing the text "firewall" and a magnifying glass icon. A red box highlights the search bar, and a red arrow points from the magnifying glass icon to the search results below. The search results are displayed under the heading "Requests" and include the following items:

- IP Address Services for OTech Devices**
Assign an IP Address, return an IP Address, or other IP Address service for Gold Camp devices (134.x.x.x, 205.225.x.x)....
- Open Systems Storage (NAS) Request**
Request new allocation of storage resources for open systems. Refer to the
- Firewall (new)**
Request for firewall configuration additions, changes, and deletions for access control to servers and networks using...
- Admin/RDP Access to Windows Server(s)**
Used to request administrative credentials on a Windows server managed by OTech. (Note: This request does not cover...

Click the magnifying glass after selecting the keyword you want to search for. SRM will present a screen similar to the one above displaying services requests that match your keyword search. Click on the link to navigate to the SR.

Lesson 2

How to Search for Your Own Service Requests

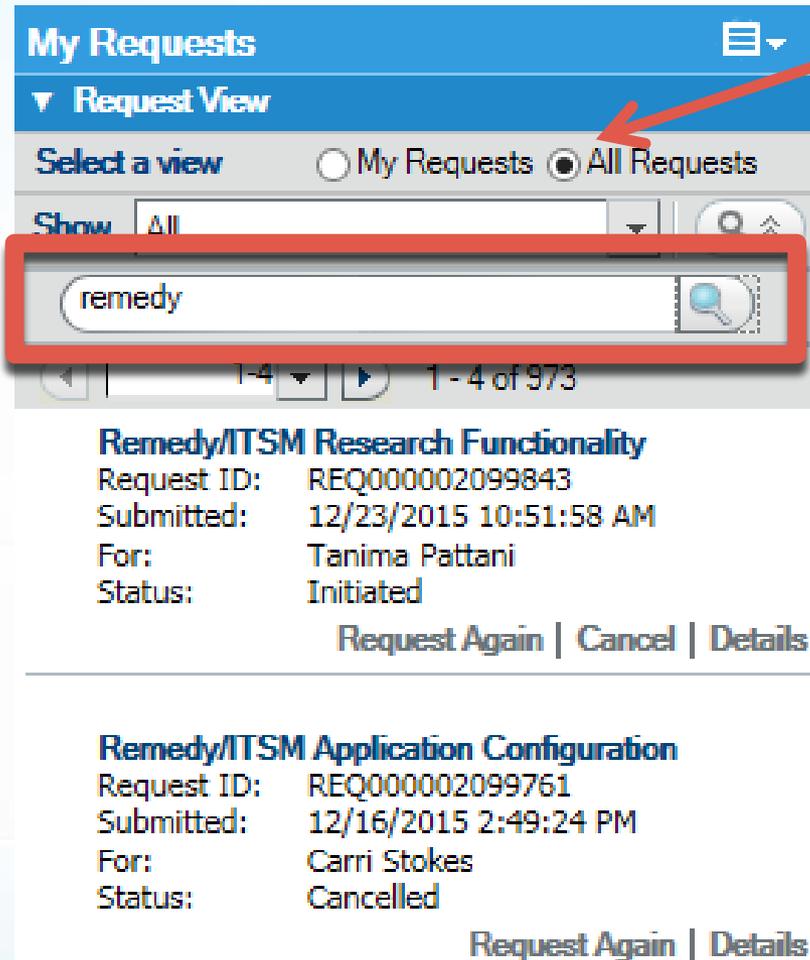


The screenshot shows the 'My Requests' section of a service request management system. At the top, there is a blue header with 'My Requests' and a menu icon. Below it is a 'Request View' section with a dropdown arrow and two radio buttons: 'My Requests' (selected) and 'All Requests'. A 'Show' dropdown is set to 'All'. A search bar is highlighted with a red box and contains the text 'remedy'. Below the search bar, two request cards are visible, both for 'Remedy/ITSM Application Configuration'. The first card has Request ID: REQ000002099761, Submitted: 12/16/2015 2:49:24 PM, For: Carri Stokes, and Status: Cancelled. The second card has Request ID: REQ000002087691, Submitted: 9/17/2015 3:38:41 PM, For: Carri Stokes, and Status: Closed. Each card has 'Request Again' and 'Details' links.

To Search for your existing Service Requests by a keyword, click on the magnifying button located in the My Requests section to make the Search field visible. The screen shows the SRM application filtered the service requests to display on the keyword "Remedy".

Lesson 3

How to Search for Your Department's Service Requests



The screenshot shows the 'My Requests' interface. At the top, there is a blue header with 'My Requests' and a menu icon. Below it is a 'Request View' section with a 'Select a view' dropdown. Two radio buttons are visible: 'My Requests' (unselected) and 'All Requests' (selected). A red arrow points to the 'All Requests' radio button. Below the view selection is a search bar containing the text 'remedy', which is highlighted with a red box. The search results are displayed below the search bar, showing two entries:

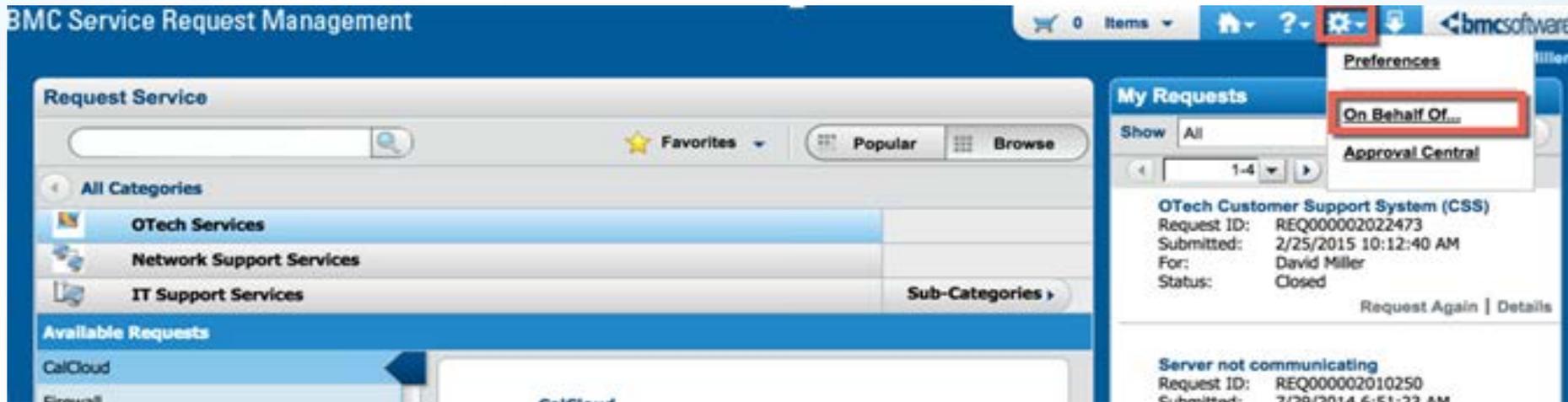
Remedy/ITSM Research Functionality	
Request ID:	REQ000002099843
Submitted:	12/23/2015 10:51:58 AM
For:	Tanima Pattani
Status:	Initiated
Request Again Cancel Details	

Remedy/ITSM Application Configuration	
Request ID:	REQ000002099761
Submitted:	12/16/2015 2:49:24 PM
For:	Carri Stokes
Status:	Cancelled
Request Again Details	

To Search for Service Requests by a keyword for your entire department, make sure you choose the option for All Requests. The screen shows the SRM application filtered the service requests to display on the keyword “Remedy” for the entire department.

Lesson 4

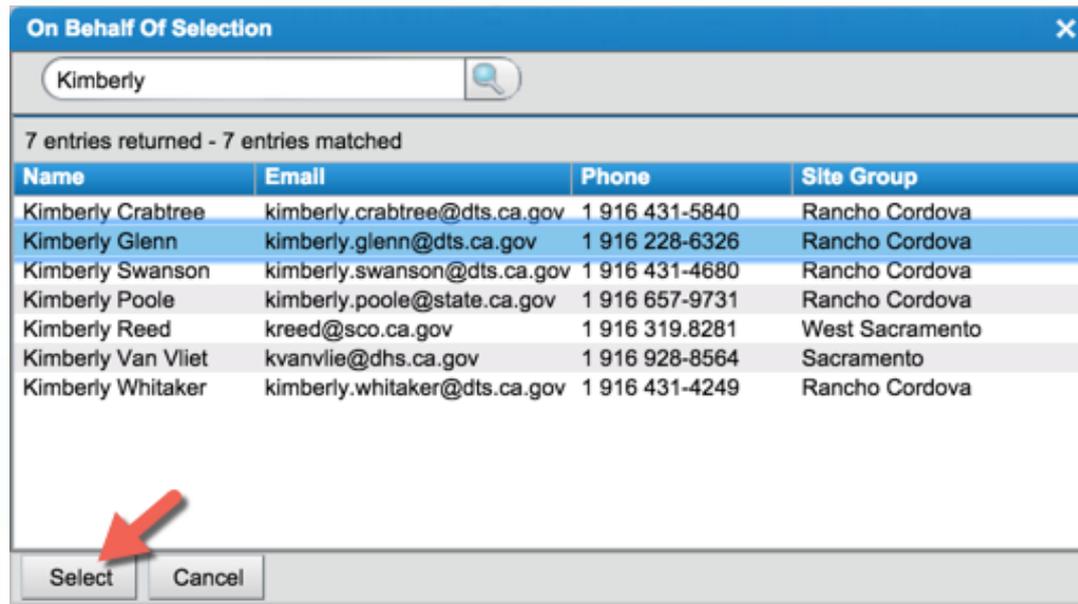
How to Search for Another Person's Service Requests



To search for Service Requests for another employee within your department, click the *Settings* (gear) icon located at the top of the SRM Application Console Home page, then select *On Behalf Of...*

Lesson 4

How to Search for Another Person's Service Requests



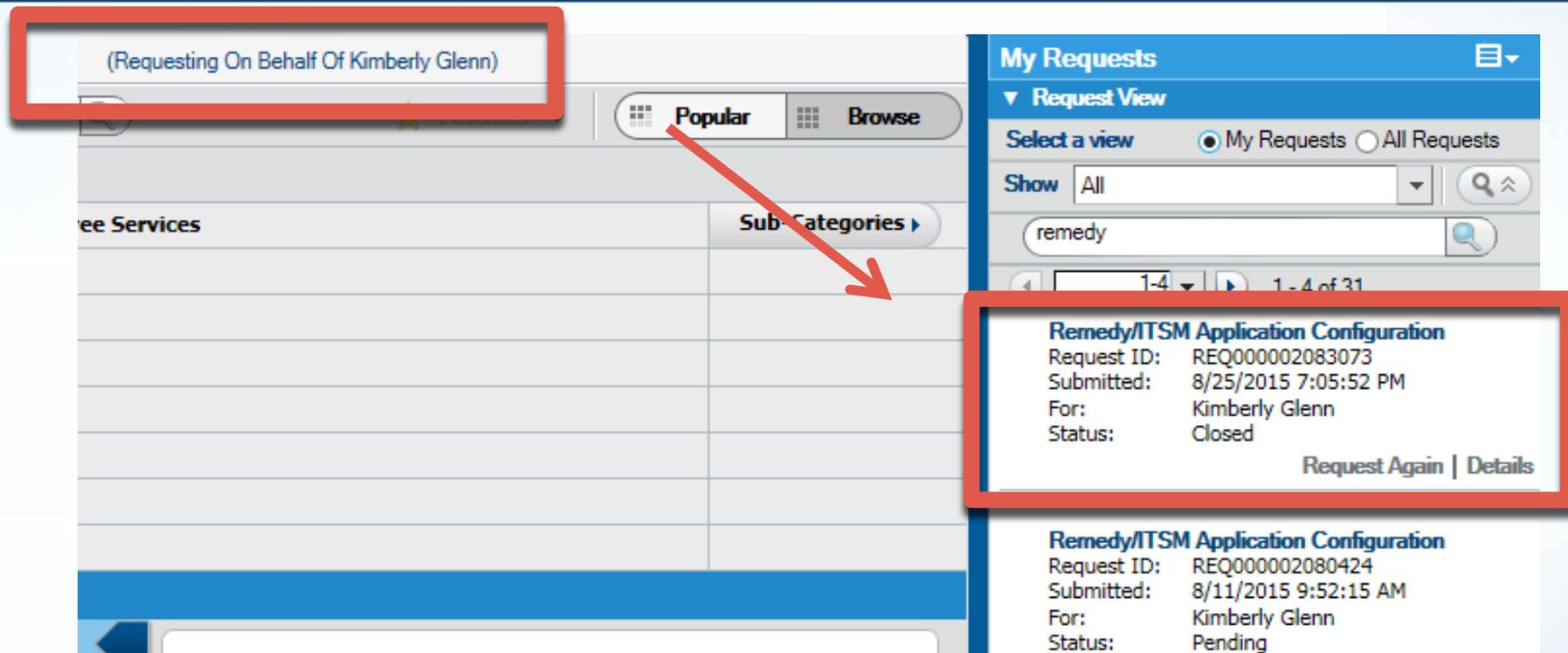
The screenshot shows a search dialog box titled "On Behalf Of Selection" with a search field containing "Kimberly" and a search icon. Below the search field, it indicates "7 entries returned - 7 entries matched". A table lists the search results with columns for Name, Email, Phone, and Site Group. A red arrow points to the "Select" button at the bottom left of the dialog.

Name	Email	Phone	Site Group
Kimberly Crabtree	kimberly.crabtree@dts.ca.gov	1 916 431-5840	Rancho Cordova
Kimberly Glenn	kimberly.glenn@dts.ca.gov	1 916 228-6326	Rancho Cordova
Kimberly Swanson	kimberly.swanson@dts.ca.gov	1 916 431-4680	Rancho Cordova
Kimberly Poole	kimberly.poole@state.ca.gov	1 916 657-9731	Rancho Cordova
Kimberly Reed	kreed@sco.ca.gov	1 916 319.8281	West Sacramento
Kimberly Van Vliet	kvanvlie@dhs.ca.gov	1 916 928-8564	Sacramento
Kimberly Whitaker	kimberly.whitaker@dts.ca.gov	1 916 431-4249	Rancho Cordova

To find a specific user, enter the user's name in the *Search* field and click the *Search* icon. Select the user from the search results and click *Select*.

Lesson 4

How to Search for Another Person's Service Requests



(Requesting On Behalf Of Kimberly Glenn)

Popular Browse

Service Services Sub Categories

My Requests

Request View

Select a view My Requests All Requests

Show All

remedy

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Remedy/ITSM Application Configuration
Request ID: REQ000002083073
Submitted: 8/25/2015 7:05:52 PM
For: Kimberly Glenn
Status: Closed
[Request Again](#) | [Details](#)

Remedy/ITSM Application Configuration
Request ID: REQ000002080424
Submitted: 8/11/2015 9:52:15 AM
For: Kimberly Glenn
Status: Pending

The person's name will now appear at the top of the screen as *Requesting on Behalf Of*, and the Service Requests listed under the *My Requests* section will now display their requests.