California
DEPARTMENT OF TECHNOLOGY

Service Request Management (SRM) User Guide for Submitters

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1.0 Overview of ITSM Service Request Management Application (Remedy)

The ITSM Service Request Management (SRM) application is a web portal for creating, approving, and tracking service requests submitted to the California Department of Technology (CDT). It is essentially an ordering system, replacing CSS, that allows CDT users to order services from a catalog. The application is known as ITSM and SRM; however, it is most commonly referred to as Remedy.

The SRM application enables CDT to define offered services, publish defined services in a service catalog, and automate the fulfillment of published services for their customers. The application also provides automated workflows for each published service, enforcing consistency of process, and improved fulfillment of the request. With SRM, users can self-provision service requests, resulting in improved service requisition, coordination, and fulfillment.

CDT has created a number of service request templates for external and internal users through the SRM web portal. This user guide provides step by step instructions for internal and external users to follow to submit, approve, and track service requests.

1.1 Service Categories

There are currently a total of eight (8) service categories available to choose from.

NOTE: Some of the categories (e.g. *Dept of Technology Employee Services*) are only visible to internal CDT employees. By default, the Browse button is selected on the main page of SRM with the first category pre-selected.

- Dept of Technology Employee Services (CDT Employees only)
- Infrastructure Services
- Network Services
- Software Services

- Email/Mobile Services
- Professional Services
- Service Desk Services
- Other Services

2.0 Submitting Service Requests

2.1 Login to SRM Application

NOTE: Pop-ups must be enabled on your browser for the SRM application to open.

NOTE: If you don't have a user name and password to create service requests, please reach out to the Service Desk at 916-464-4311 to request your logon credentials.

1. Use the following URL to launch the web client (Figure 2.1.1)

   https://service-technology.us.onbmc.com/arsys/forms/onbmc-s.us.onbmc.com/SRS:ServiceRequestConsole/

2. Enter *User Name* and *Password*. The SRM application console will launch.

[Figure 2.1.1: Logging into the SRM Application]

3. Customers may also access the SRM console using the following URL:

   http://www.otech.ca.gov/

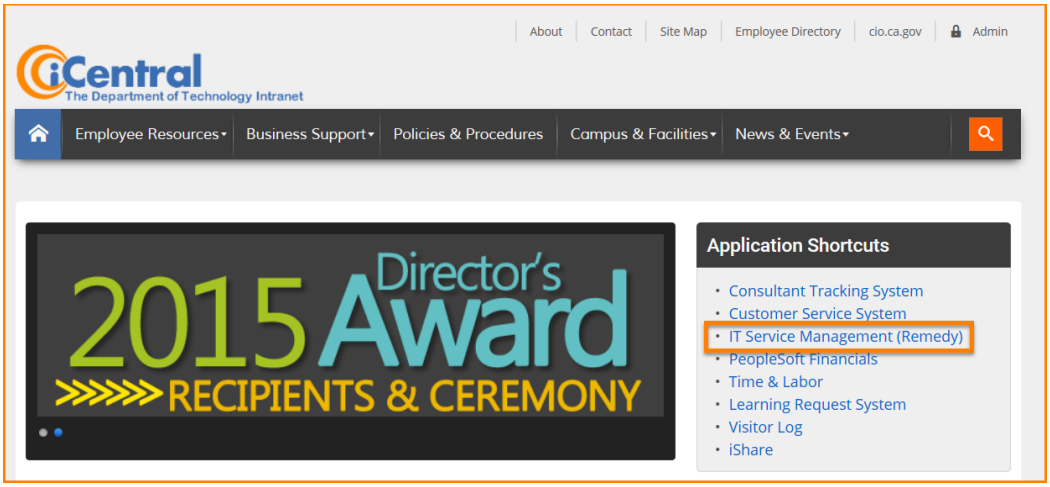
   - Mouse Over to *Service Desk* task.
   - Click *ITSM SRMS Login* (*Figure* 2.1.2)

[Figure 2.1.2: Accessing the SRF Application from OTech site]

4. CDT employees can access the SRM console from the Intranet:

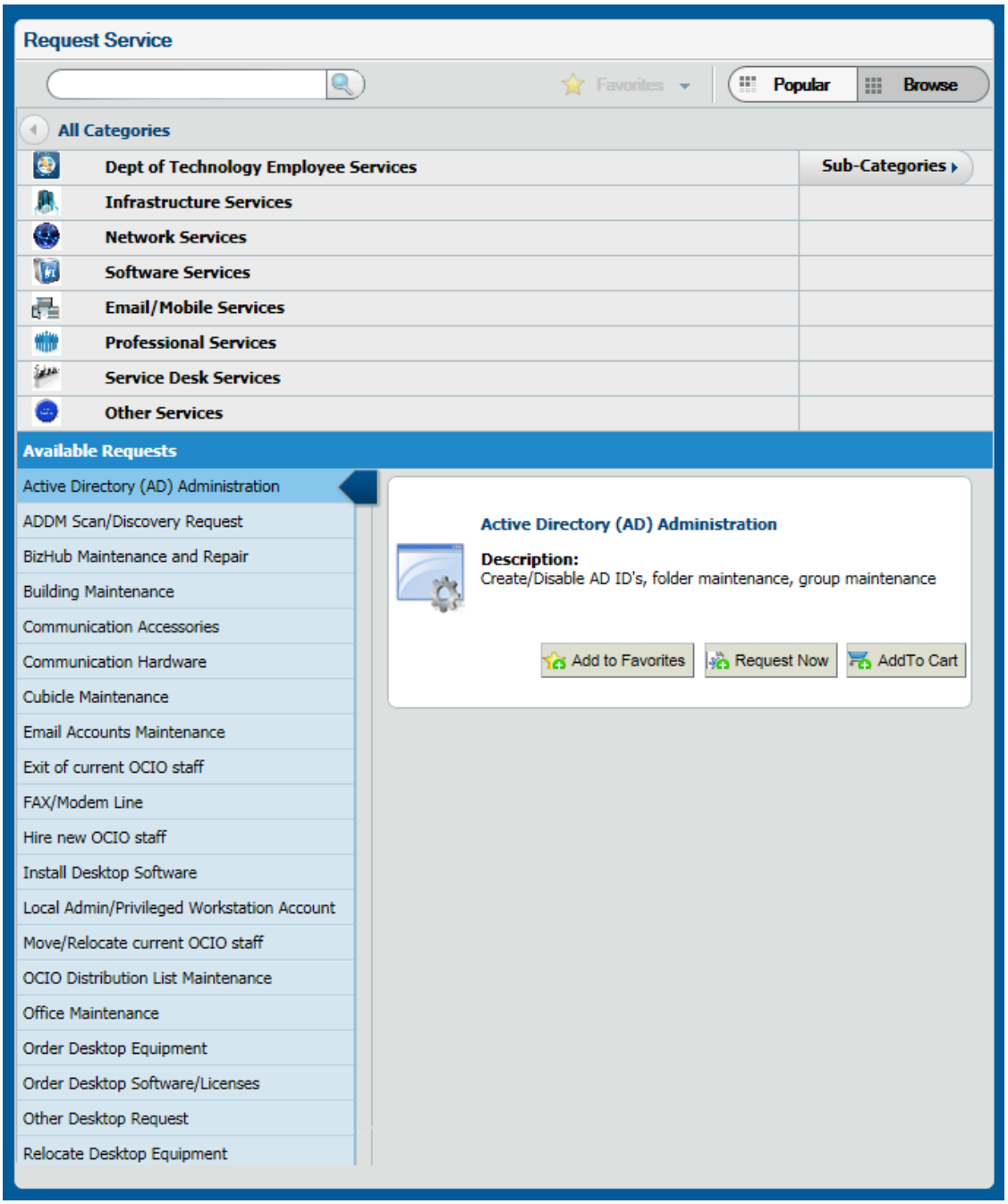
   http://icentral.technology.ca.gov/

   - Mouse over Application Shortcuts
   - Click IT Service Management (Remedy) (Figure 2.1.3)



[Figure 2.1.3: Accessing the SRF Application from the Intranet]

Upon successful login, the SRM application console will launch. The following is a screenshot (Figure 2.1.4) of the SRM application console.



[Figure 2.1.4: SRM Application Request Entry Console within Remedy]

NOTE: Some of the service requests were implemented prior to CDT creating a formal process. Due to the level of usage, they have remained in the system and are candidates for future SRD development.

The SRM application console displays the following information:

- A *Browse* icon to find request categories that are available.
- A list of *Available* requests for a selected category.
- A list of your submitted requests.
- A slide show of Remedy features.
- A *Search* field to find service requests.
- A *Favorites link* to view requests that you marked as your favorites from the *Categories* page.

2.2 Categories and Sub-Categories

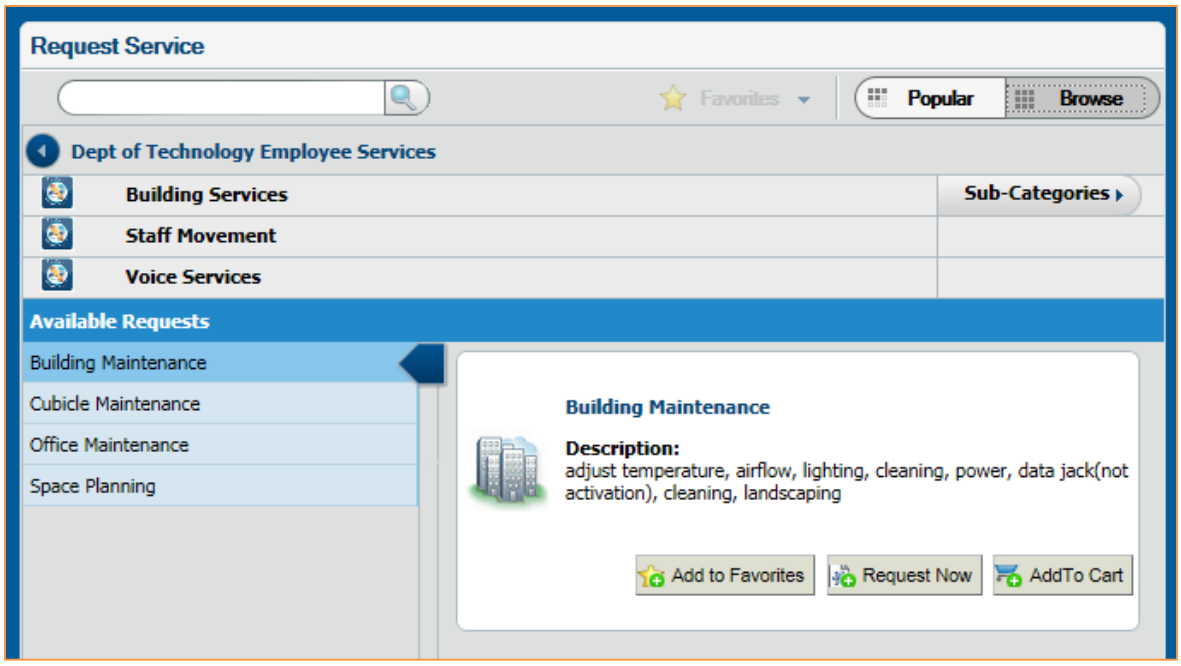
The *Browse* button links to request categories that are available for use. When selecting a category, the list of requests available are grouped under the category heading.

NOTE: Some of the categories (e.g. *Dept of Technology Employee Services*) are only available to internal CDT staff. By default, the Browse button is selected on the main page of SRM with the first category pre-selected.

Follow the instructions below to find requests by category.

1. In the SRM application console, click *Browse*, located adjacent to the *Popular* field. A list of available categories appears. **NOTE**: If the categories are already displayed, there is no need to click Browse. By default, the first category, which is *Dept of Technology Employee Services* (visible to CDT only) is selected and the service requests for this category are displayed under *Available Requests*. *Subcategories*, if any, appear adjacent to their respective categories. Non-CDT employees will see the Infrastructure Services Category selected as a default.
2. Click a category to view available requests in the panel below; click a subcategory to view requests available within it.
3. To navigate back from a subcategory, click the left arrow button located next to the subcategory heading.

The following screenshot (Figure 2.2.1) is displayed when user clicks *Sub-Categories* button of *Dept of Technology Employee Services.*

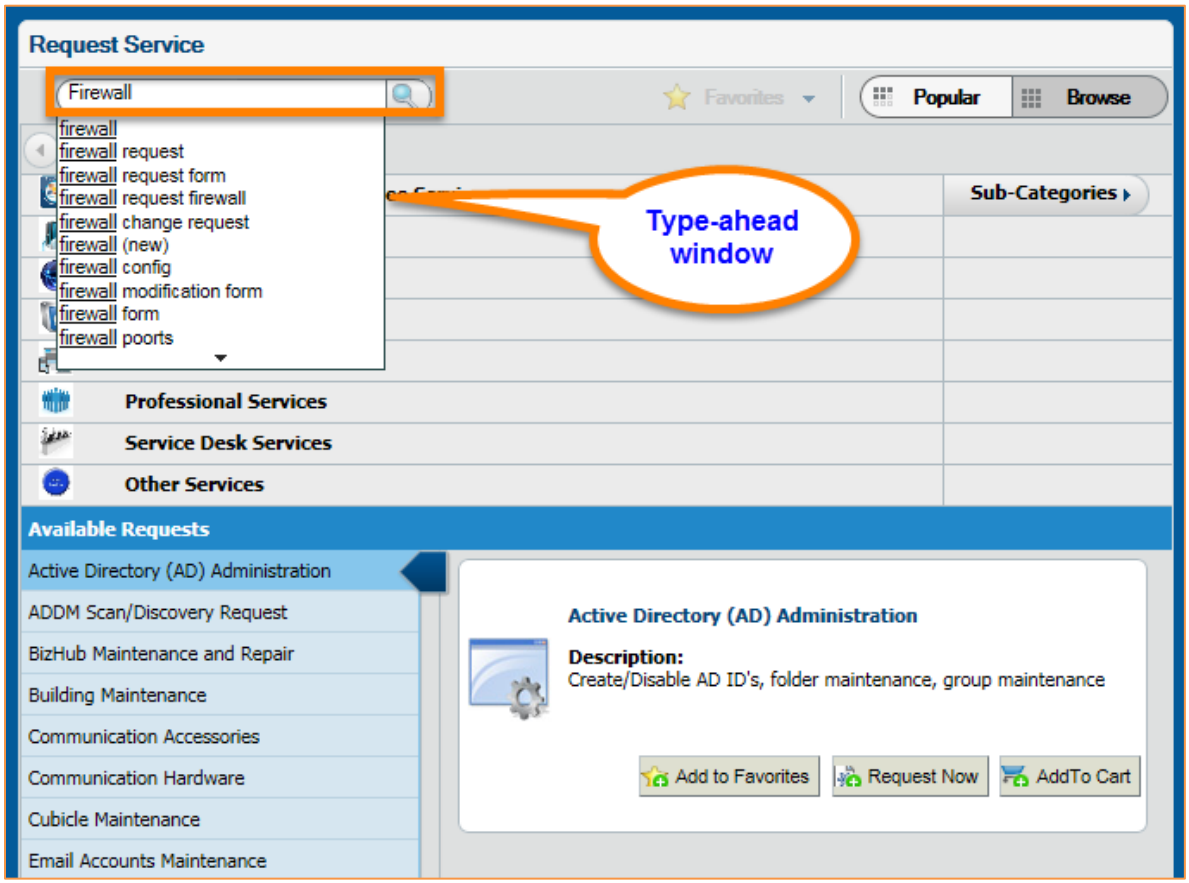


[Figure 2.2.1: Screenshot showing subcategories of *"Dept of Technology Employee Services"]*

2.3 Search Service Requests

The *Search* field enables users to find matching requests using the type ahead functionality. When the user begins to type in the *Search* field, the application displays suggestions in a type-ahead list below the *Search* field. The user can select a suggested keyword or continue to enter the keyword in the *Search* field. Clicking the *Search* (magnifying glass) icon displays records that match the search keyword.

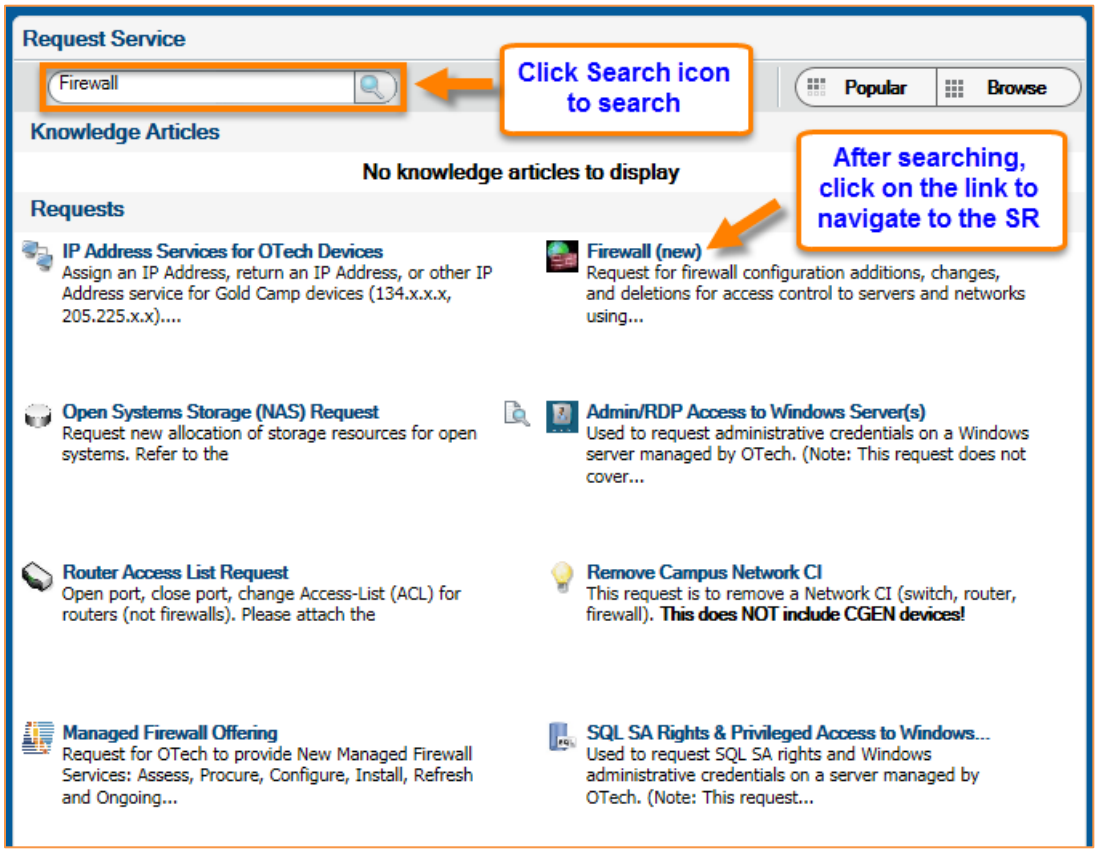
The following screenshot (Figure 2.3.1) shows the type-ahead window when the user types *Firewall* in the *Search* field.



[Figure 2.3.1: Type-ahead feature of SRM application]

The following screenshot (Figure 2.3.2) shows what the user will see when they type *Firewall* in the *Search* field and click on the *Search* icon.

NOTE: You may also press the *Enter* key on your keyboard to execute the search.

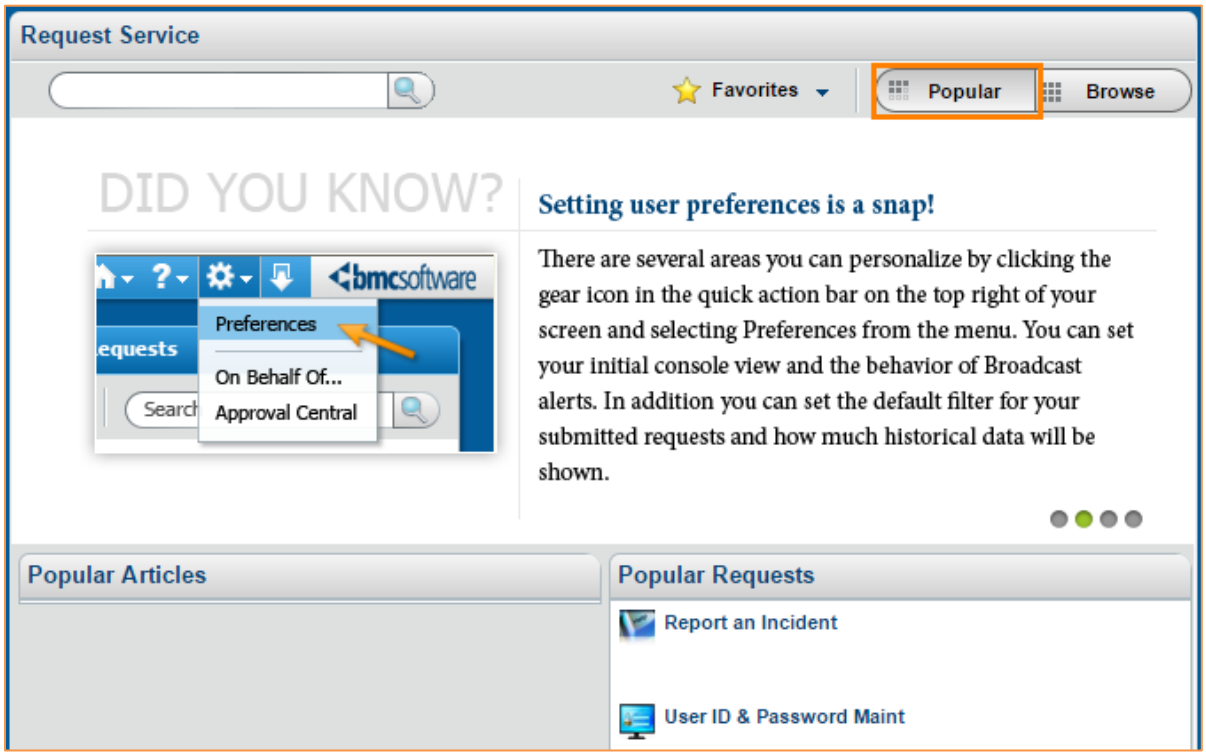


[Figure 2.3.2: Search results after user clicks the magnifying glass icon]

2.4 Popular View

The Popular view displays a list of the most frequently submitted requests. This screen also allows the user to view a slide show of how to do certain items within Remedy.

Click on the *Popular* button as shown in the screenshot below (Figure 2.4.1).



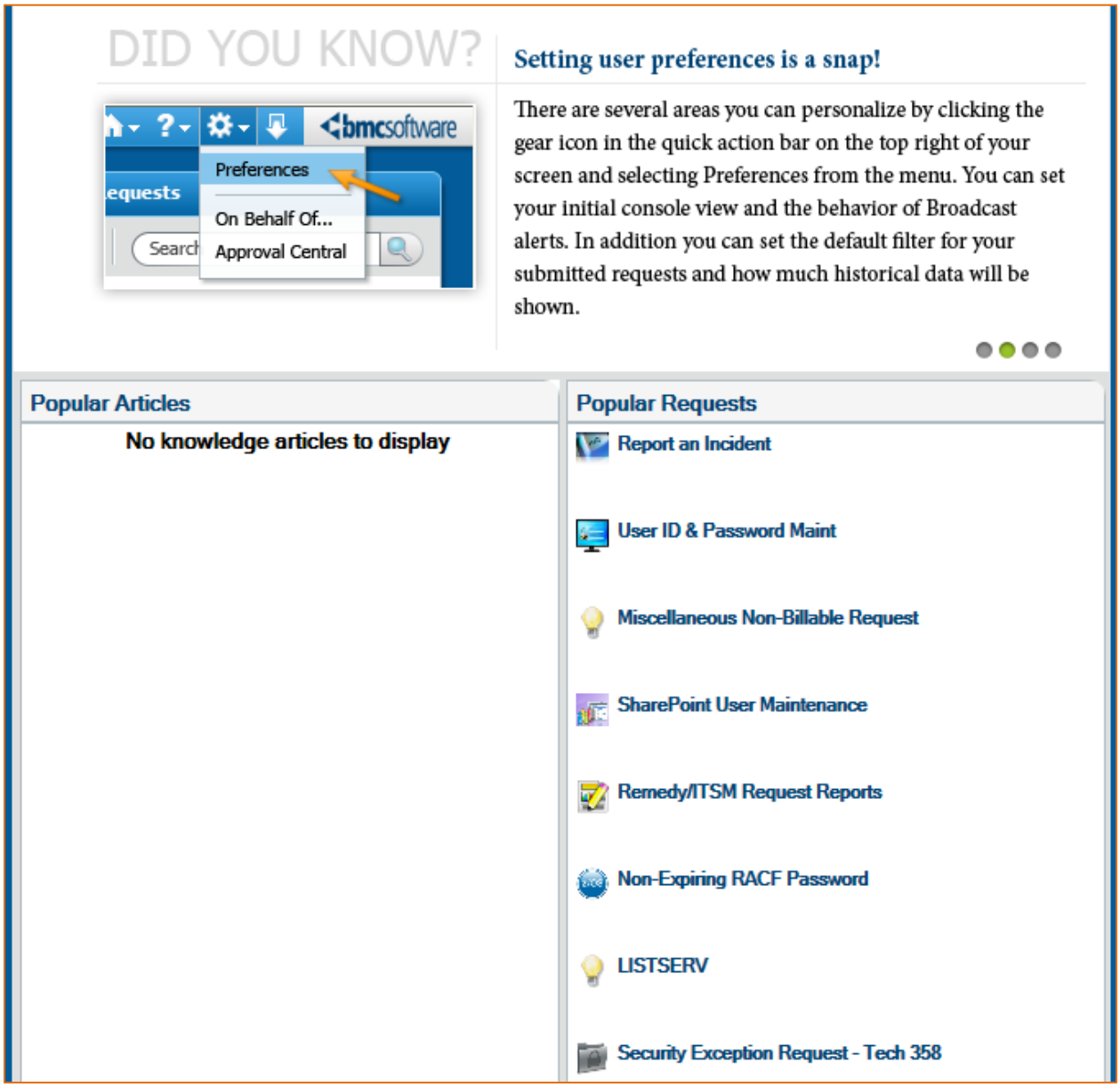
[Figure 2.4.1: SRM application popular view]

2.4.1 Popular Requests

Popular requests are added automatically, based on how many times all users submit a service request during a specified period of time. From this list, you can select a request with a single click.

The screenshot below (Figure 2.4.2) highlights the *Popular Requests* panel inside the *Popular* view.

NOTE: Since the system will adjust the contents of this screen based on use during a specific period of time, the screenshots in this user guide may be different from what you see when logged in.



[Figure 2.4.2: SRM application Popular Requests panel]

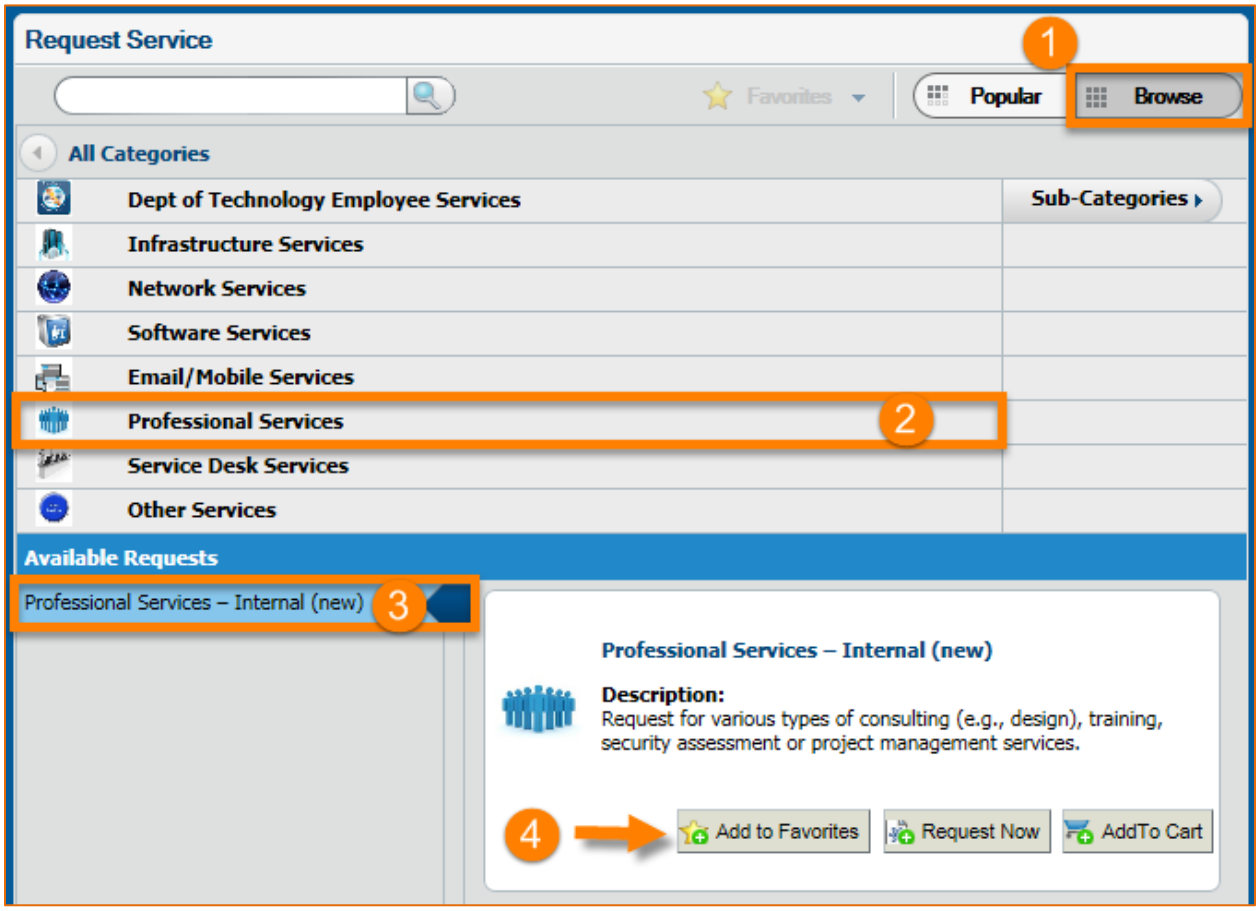
2.5 Favorites

If similar requests are submitted frequently, they can be added to a list of favorite requests. *Favorite* requests can be added from the *Categories* page. Previously added Favorite service

requests will appear on the *Categories* page. From your *Favorites* list, you can submit a service request, add a service request to the cart, or remove a request (Figure 2.5.2).

Follow the instructions below (Figure 2.5.1) to add a service request to favorites:

1. In the SRM console, if needed, click *Browse* to view the *Categories* page.
2. From *All Categories* view, select *Professional Services*.
3. From the *Available* Requests area, select a subcategory to view the available service requests options. The screenshot below (Figure 2.5.1) shows the section of *Professional Services* service request.
4. Click *Add to Favorites* to add the service request to the favorites list.



[Figure 2.5.1: Add service request to Favorites]

5. After adding the service request(s) to the favorites list, the *Favorites* link is activated on the screen. Click the *Favorites* drop-down list, located adjacent to the *Popular* and *Browse* button, to view requests in your favorites list (Figure 2.5.2).

6. Below each request, The *Request Now, Add to Cart, and Remove* options are displayed (Figure 2.5.2).

A Favorite request can be submitted by clicking *Request Now* from the favorites list. Also, a service request can be removed by clicking the *Remove* link from the favorites list.

[Figure 2.5.2: Favorites panel showing service requests you have added to Favorites]

2.6 My Requests

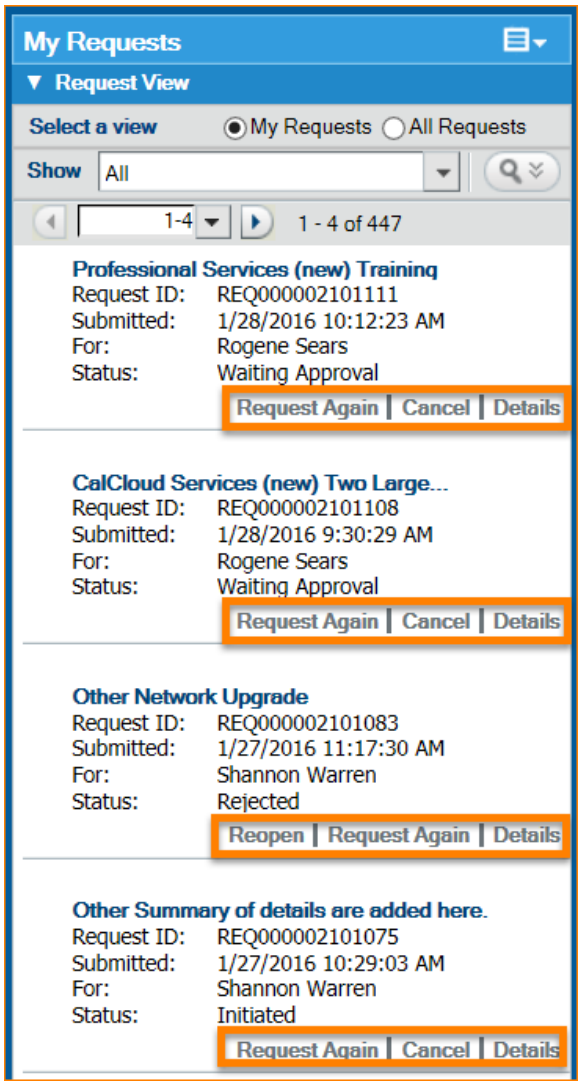
Your submitted requests are listed in the *My Requests* pane. This view shows the service requests that have been submitted by you as well as submitted by another user using the *on behalf of* feature and selecting you as *on behalf of* user.

The following options are displayed for a submitted request (Figure 2.6.1):

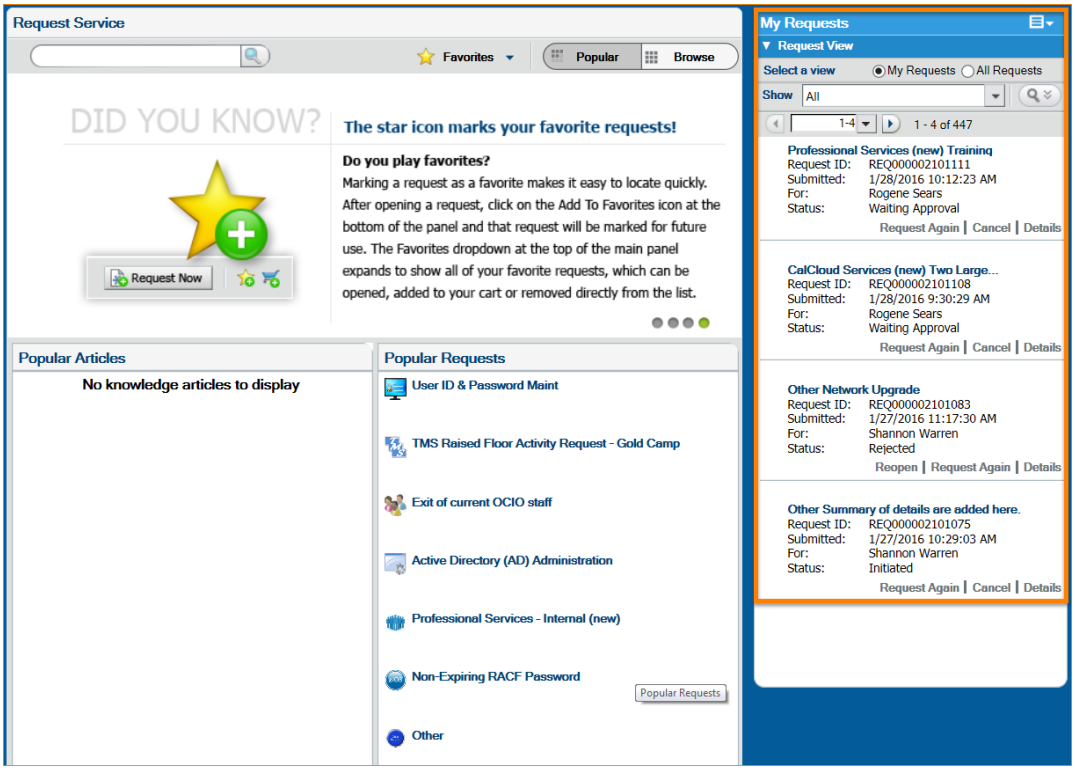
- **Details** — Select this option to view the request summary and the activity log. Any attached files will be listed in the activity log. Any files can be attached to the request from the Details tab.
- **Cancel** — Select this option to cancel a submitted request.
- **Request Again** — Select this option to create a new request similar to an existing request. Note: When using the option, all relevant fields are copied into the new

request, including all answers provided for the previous submission. The information may be modified to meet the needs of the new request.

- **Complete** — This option is available only for draft requests. Select this option to open the request and update the information.
- **Reopen** – If your request has not been completed to your satisfaction, you may select this option to reopen your request. See section 4.5 for detailed information.



[Figure 2.6.1: My Requests pane showing actions for service requests]

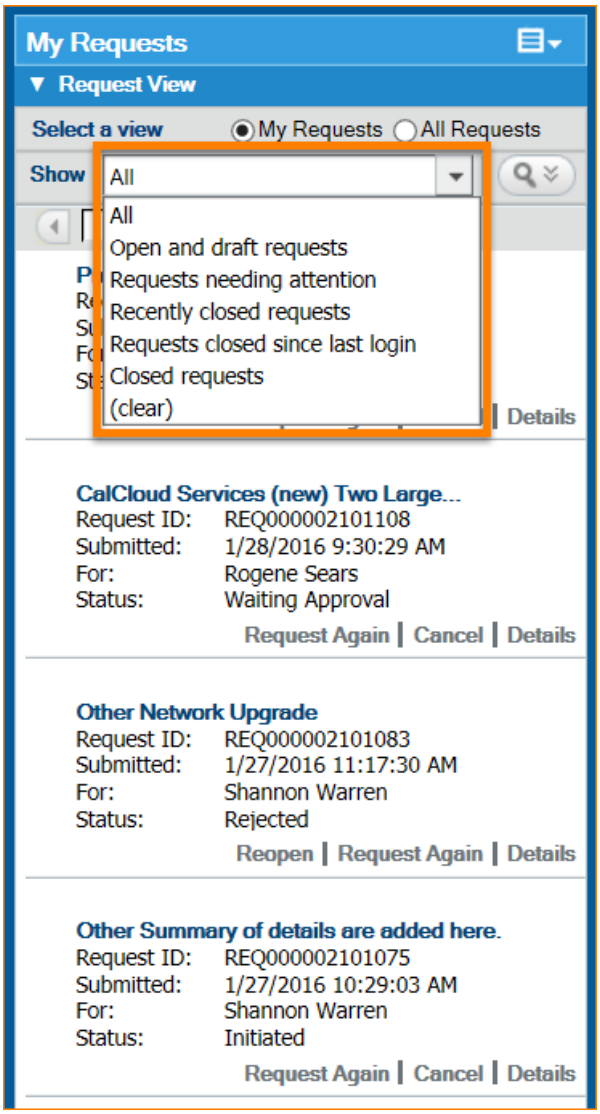


[Figure 2.6.2: My Requests pane of SRM application]

By default, the system shows all service requests, and includes their request ID, submitted date, and status. From the *Show* drop-down option, various status of service requests can be selected. To view requests by a specific status type, select one of the following options:

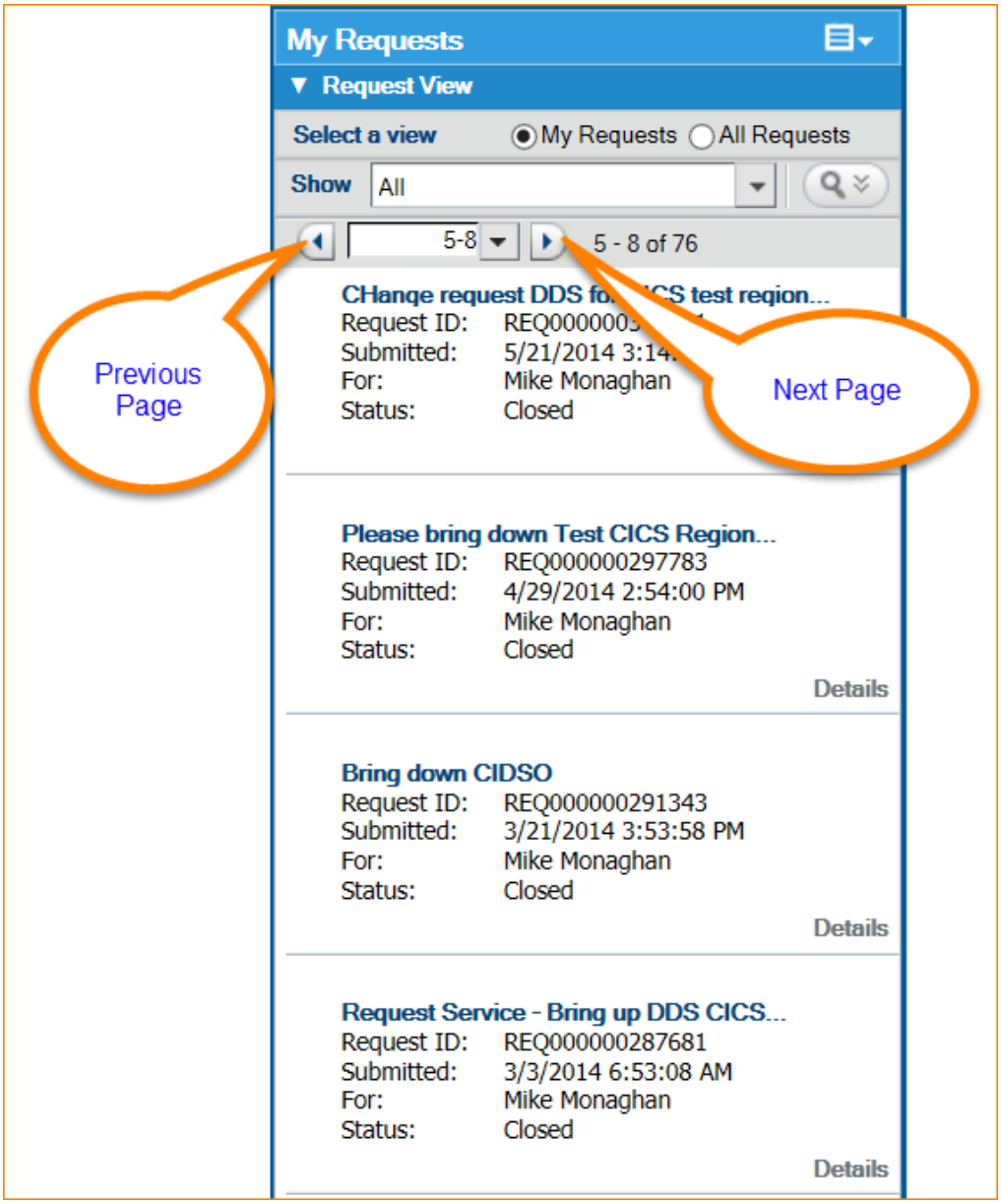
- **All**: All submitted requests regardless of their status.
- **Open and draft requests**: Requests that have not yet been closed and requests that have not yet been submitted to CDT for implementation.
- **Requests needing attention**: Requests for which a fulfillment person has created an entry in the request's *Activity Log*. The purpose of the note may be that the fuller is providing you, the submitter, an update or requesting information.
- **Recently closed requests**: Requests that were recently closed/fulfilled and can include rejected requests.

- **Requests closed since last login**: Requests that were closed since the last time the user logged in to the SRM application console.
- **Closed requests**: All your closed requests.



[Figure 2.6.3: My Requests pane showing service request statuses]

In the *My Requests* pane, only four requests can be shown per page (Figure 2.6.4). To view other requests, click the down arrow showing the number list or click the Next Page/Previous Page arrow.

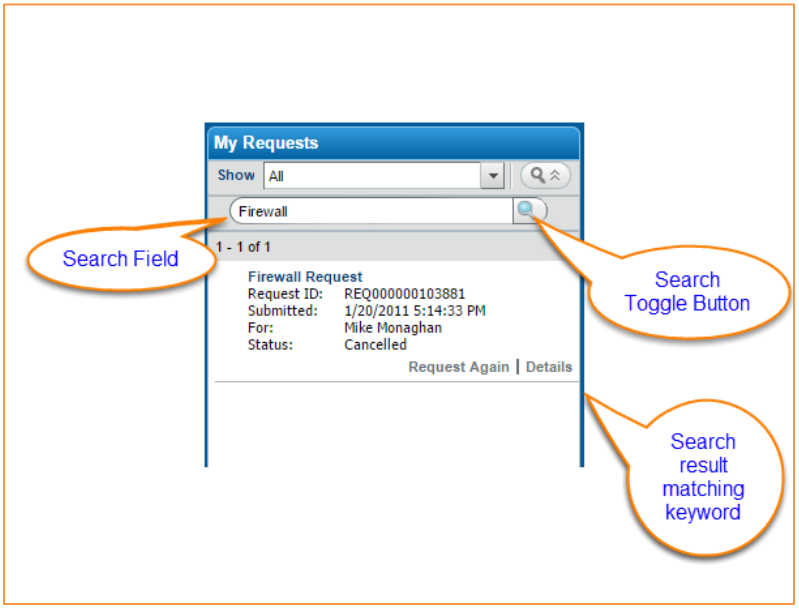


[Figure 2.6.4: My Requests pane showing previous page and next page buttons]

The *Search* button on the *My Requests* pane allows you to search using keywords from your existing service requests. This feature is useful when you are managing many service requests and you are looking for a specific service request or a group of service requests matching the keyword.

The user can toggle the display of *Search* field by clicking the magnifying glass icon next to the *Show* list (Figure 2.6.5). The screenshot below (Figure 2.6.5) shows how the *Search*

field, the toggle button and the search results in the *My Requests* pane when user enters the keyword "*Firewall*" and clicks the toggle button.



[Figure 2.6.5: My Requests pane – Toggle icon]

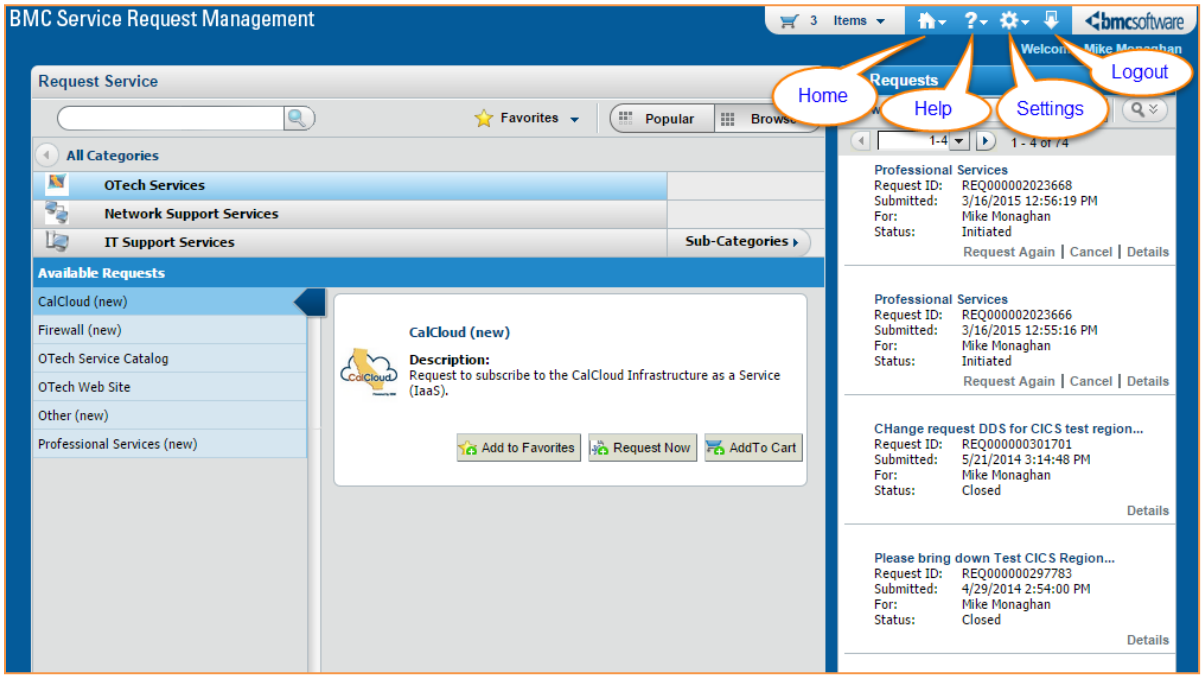
2.7 SRM Menu Bar Features

The SRM application console menu bar consists of the following items:

1. **Home** — Click this icon from any screen on the SRM application console and select the home page you want to view.
2. **Question mark (Help)** — Click this icon to view the following options.
    a. **Help** — Click this link to view online help.
3. **Gear (Settings)** — Click this icon to view the following options:
    a. **Preferences** — You do not need to use this feature.
    b. **On Behalf of** — Click this option to search for users on whose behalf you are allowed to submit requests.

c. **Approval Central** — Click this link to view a list of individuals who must approve your requests.

4. **Down Arrow (Logout)** — Click this icon to log out of the SRM application console.



[Figure 2.7.1: SRM Application Menu bar features]

[Figure 2.7.2: Close-up of SRM Application Menu bar features]

2.8 Creating a Service Request Using *Other* Services

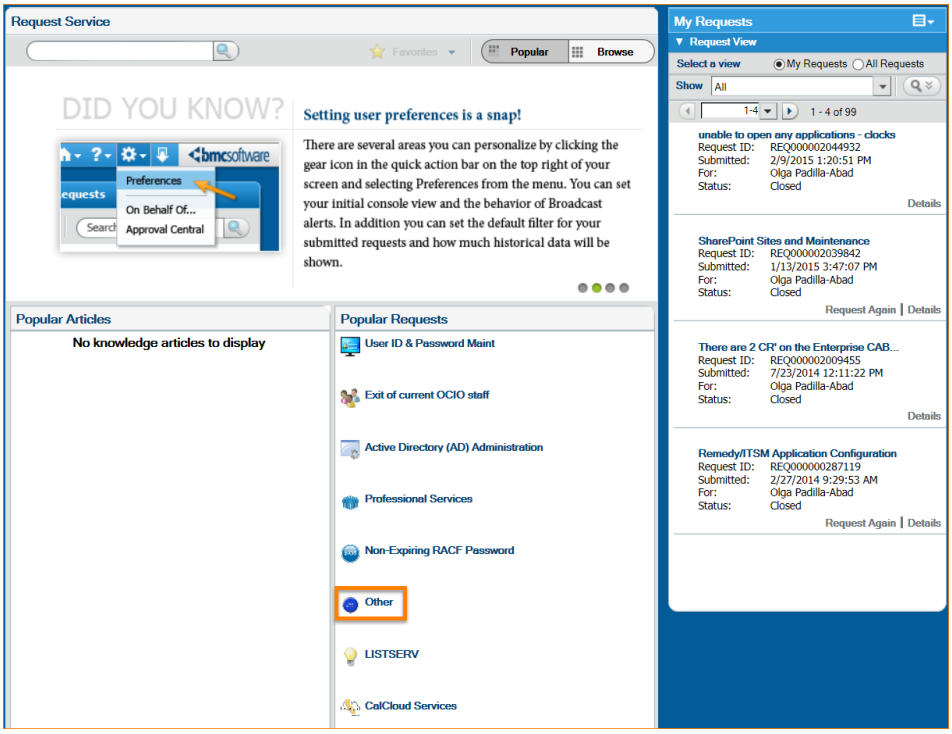
All users can submit the *Other* services request when the available service requests categories are not applicable.

Other services requests can be created using any of the following approaches.

1. Select *Other* from the popular requests section of the console. Click *More* to view additional requests.
2. If there is more than one page of previous requests, click the *Next Page* or *Previous Page* arrows or select a page from the drop-down list to view additional requests.

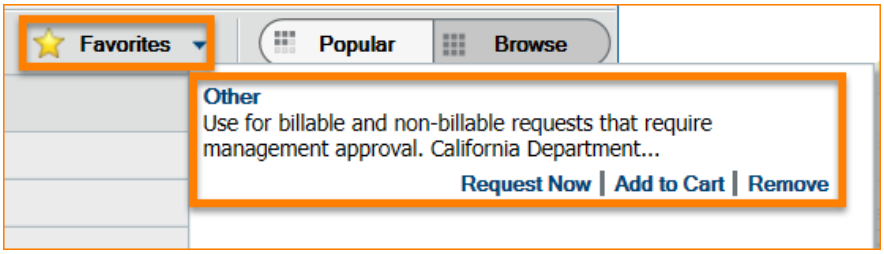
NOTE: Since the system will adjust the contents of the *Popular Requests* screen based on usage during a specific period of time, the *Other* services option may not be available when you navigate to this screen.

The screenshot below (Figure 2.8.1) shows the *Other* services request in the Popular Requests panel.



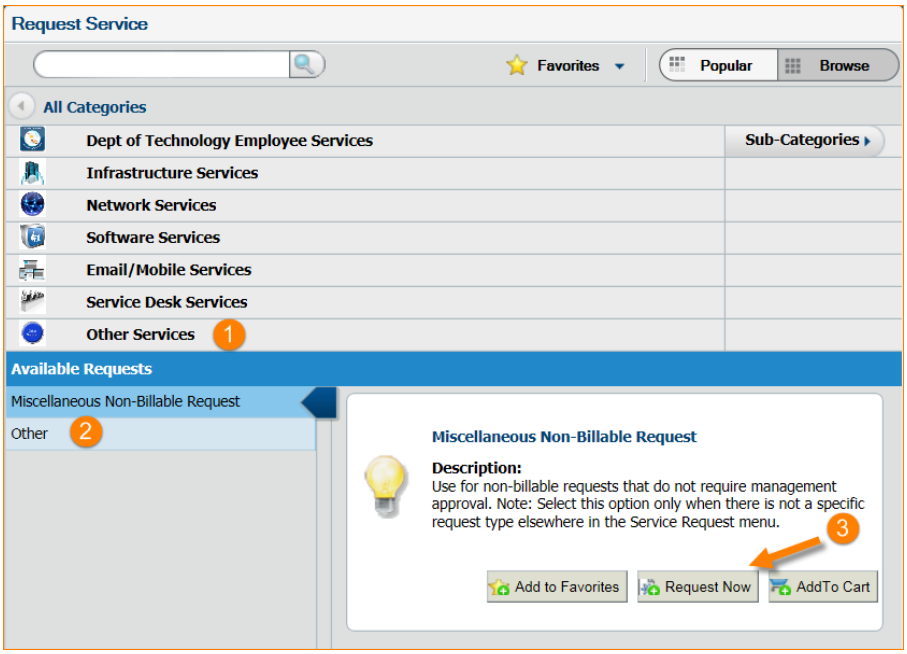
[Figure 2.8.1: Other services request in the Popular Requests panel]

3. If *Other* services has been saved as a *Favorite* service requests, click the down arrow next to the *Favorites* link to locate *Other* services. Click *Request Now* from the favorites panel to initiate the service request.



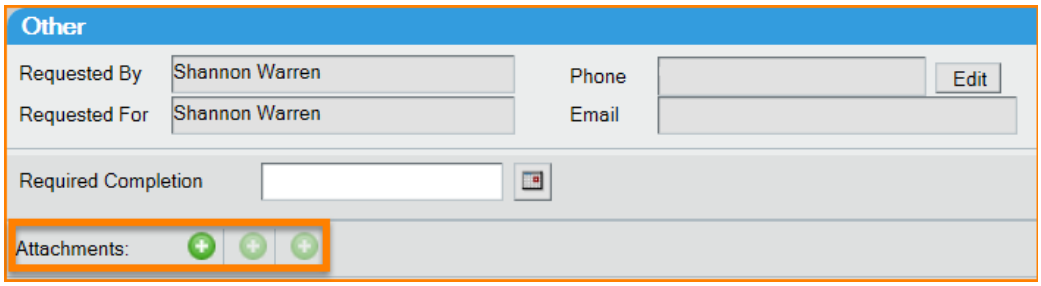
[Figure 2.8.2: Creating Other request from Favorites link]

4. Another method to locate service requests is by browsing through the request *Categories* and *Sub-Categories*. The *Other Services* category is available under the *All Categories*. Click *Request Now* (Figure 2.8.3) and the form for the *Other* services appears. User specific details, including phone number and email address are pre-filled. *Required* fields in bold will help the user identify information that must be included in order to successfully submit the request.



[Figure 2.8.3: Creating Other services service request]

5. Enter the following information in the *Other* services request form:
    1. The date when you need the request to be fulfilled.
    2. Answers to questions/request for data that are part of the service fulfillment process. Depending on a response to a question/request for data, the system might display additional questions.
    3. (Optional) *Attachments*, such as a Microsoft Word document containing additional information about the other services you are requesting. Click the *Add* icon to browse to the location of the file in your computer. A maximum of three files can be attached to a request (Figure 2.8.4).



[Figure 2.8.4: Attaching a file to service request]

The following table (2.8) shows the fields on the *Other* form

1. **Required Completion**
2. **Billing Prefix**
3. **Account Code**
4. **Approver**

   Choices: *List of approvers of your department*
5. **Second Approver**

   Choices: *List of approvers of your department.* ***Note****: if there isn't a second approver, choose None from the list.*

6. **Third Approver**

   Choices: *List of approvers of your department.* ***Note****: if there isn't a second approver, choose None from the list.*

7. **Do you wish to expedite the request?**

   If answer to the above question is *Yes*, the following field appears

   7.1 Expedite Fee: $515

8. **Are you requesting a Cost Estimate**

   Choices: *Yes*, *No - Does not require a cost estimate, No - I have received a cost estimate*

   If answer to the above question is *No – I have received a cost estimate*, the following field appears

   8.1 Cost Estimate Amount

9. **Service Category**

   Choices: Dept of Technology Employee Services, Infrastructure Services, Network Services, Software Services, Email/Mobile Services, Professional Services, Service Desk Services, Other Services

10. **What is the nature of your request?**

    Choices: New Service, Modify Service, Discontinue Service, Other

11. **What is your approved budget amount?**

12. **I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested**

13. **Does this request involve a system that stores, processes, or transmits confidential, sensitive, or personal information as defined in SIMM 5305-A?**

    Choices: *Yes, No*

    If answer to the above question is *Yes*, the following question appears, followed by check boxes:

    23.1 Which of the following data classifications does this system store, process, or transmit?

Choices: *Federal Tax Information, Personally Identifiable Information, Information subject to the Family Education Rights and Privacy Act, Payment Card Information, Criminal Justice Information, Information subject to other Regulatory Requirements* **14. Summarize your request** **15. Request details**

[Table 2.8: Fields of the Other services form]

The following figure (2.8.5) shows a screenshot of the *Other* services service request form.

Other

Requested By: Shannon Warren
Requested For: Shannon Warren
Phone: Edit
Email:

Required Completion

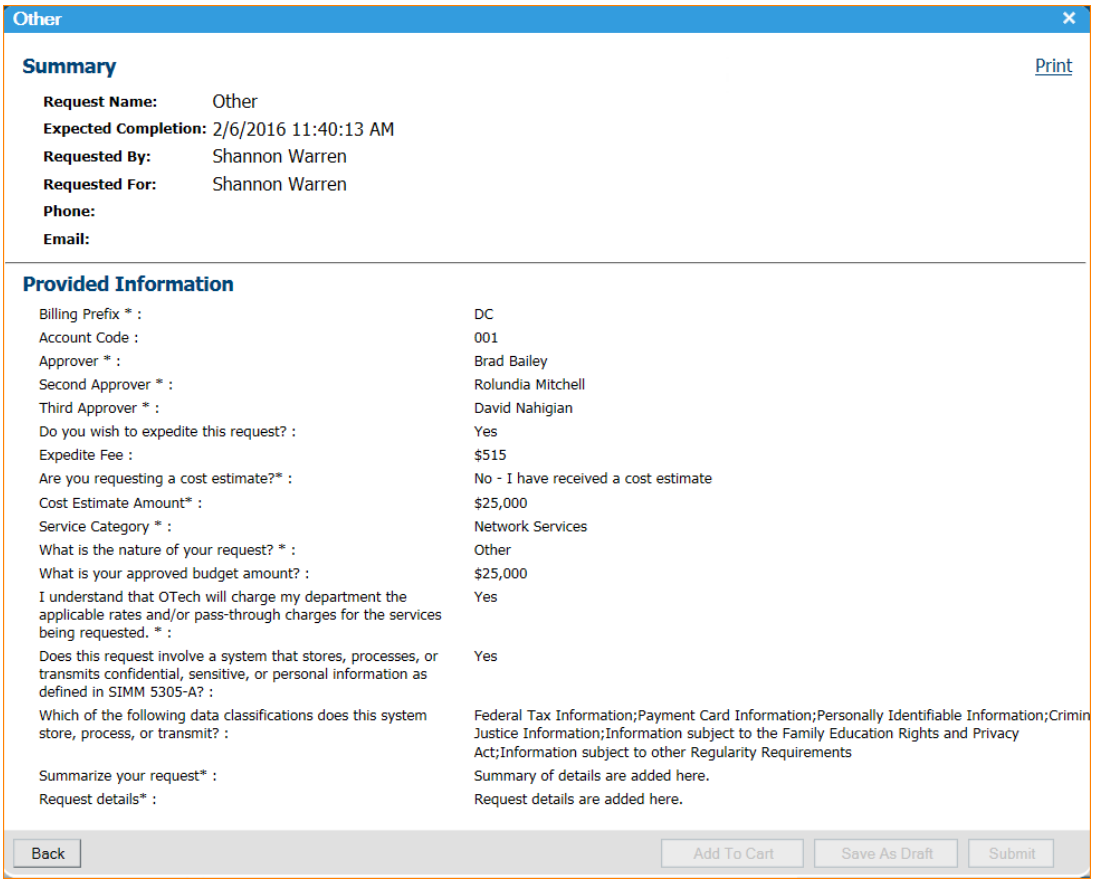
Attachments:

Billing Prefix *: DC
Account Code: 001
Approver *: Brad Bailey
Second Approver *: Rolundia Mitchell
Third Approver *: David Nahigian
Do you wish to expedite this request? ○ No ◉ Yes
Expedite Fee: $515
Are you requesting a cost estimate?* ○ Yes ○ No - Does not require a cost estimate ◉ No - I have received a cost estimate
Cost Estimate Amount* : $25,000
Service Category *: Network Services
What is the nature of your request? *: Other
What is your approved budget amount? $25,000
Depending on what you are requesting, a budget amount may be required. (Examples: New server or software license). Leaving this blank may result in delays or rejection of this request.
I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested. * ☑ Yes
Please check our rates.
Does this request involve a system that stores, processes, or transmits confidential, sensitive, or personal information as defined in SIMM 5305-A? ○ No ◉ Yes
Which of the following data classifications does this system store, process, or transmit?
☑ Federal Tax Information ☑ Payment Card Information
☑ Personally Identifiable Information ☑ Criminal Justice Information
☑ Information subject to the Family Education Rights and Privacy Act ☑ Information subject to other Regularity Requirements
Summarize your request* : Summary of details are added here.
Request details* : Request details are added here.

Summary | Add To Cart | Save As Draft | Submit

[Figure 2.8.5: Example of Other services service request form]

6. Click *Save as Draft* if additional information is being gathered to submit the request. The request will appear in the list of requests in draft mode and can be submitted at a later date.
7. To view a summary of the information entered, click *Summary*. To print a summary, click the *Print* link at the top right of the *Summary* page.



Other

Summary Print

Request Name: Other
Expected Completion: 2/6/2016 11:40:13 AM
Requested By: Shannon Warren
Requested For: Shannon Warren
Phone:
Email:

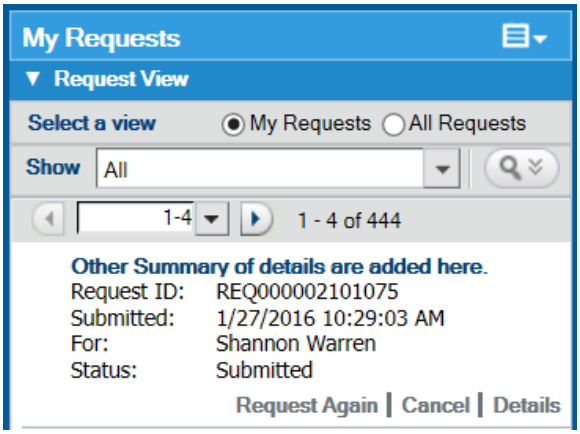
Provided Information

Billing Prefix * :	DC
Account Code :	001
Approver * :	Brad Bailey
Second Approver * :	Rolundia Mitchell
Third Approver * :	David Nahigian
Do you wish to expedite this request? :	Yes
Expedite Fee :	$515
Are you requesting a cost estimate?* :	No - I have received a cost estimate
Cost Estimate Amount* :	$25,000
Service Category * :	Network Services
What is the nature of your request? * :	Other
What is your approved budget amount? :	$25,000
I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested. * :	Yes
Does this request involve a system that stores, processes, or transmits confidential, sensitive, or personal information as defined in SIMM 5305-A? :	Yes
Which of the following data classifications does this system store, process, or transmit? :	Federal Tax Information;Payment Card Information;Personally Identifiable Information;Crimin Justice Information;Information subject to the Family Education Rights and Privacy Act;Information subject to other Regularity Requirements
Summarize your request* :	Summary of details are added here.
Request details* :	Request details are added here.

Back Add To Cart Save As Draft Submit

[Figure 2.8.6: Summary page of Other request form]

8. Click *Back* to return to *Other* services form.
9. Click *Submit* to submit the service request.
10. Check the *My Requests* pane to ensure that the service request was submitted and that the *Status* of the service request indicates *Submitted (Figure 2.8.7)*.



[Figure 2.8.7: My Requests pane showing the submission of Other service request]

3.0 Approving Service Requests

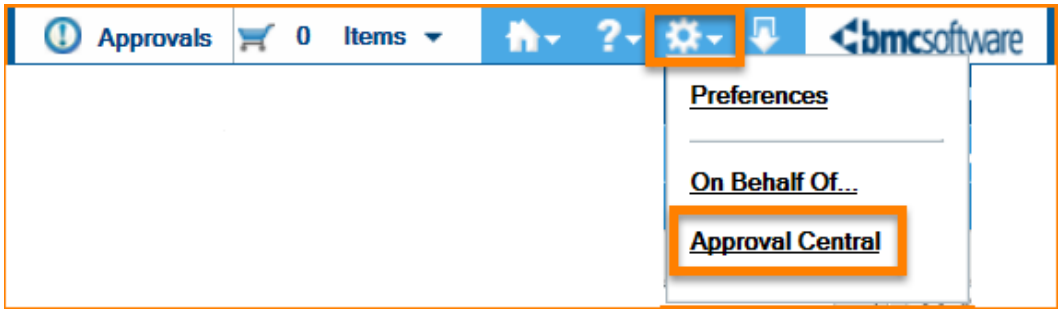
As a best practice, the submitter should never be the approver. The service request is first routed to the designated customer approvers. Once approved, the service request is then routed to CDT to begin CDT approvals and commence processing.

Approvers use *Approval Central* to access request details and approve requests. This console enables approvers to quickly review the approval requests awaiting their attention. Approvers can approve, reject, hold, or view the details of a pending request by using the appropriate buttons provided in the form. Approvers can take action on single or multiple requests at one time without opening each request individually.

3.1 Approve/Reject Service Requests

Follow the instructions below to view, approve, or reject a service request:

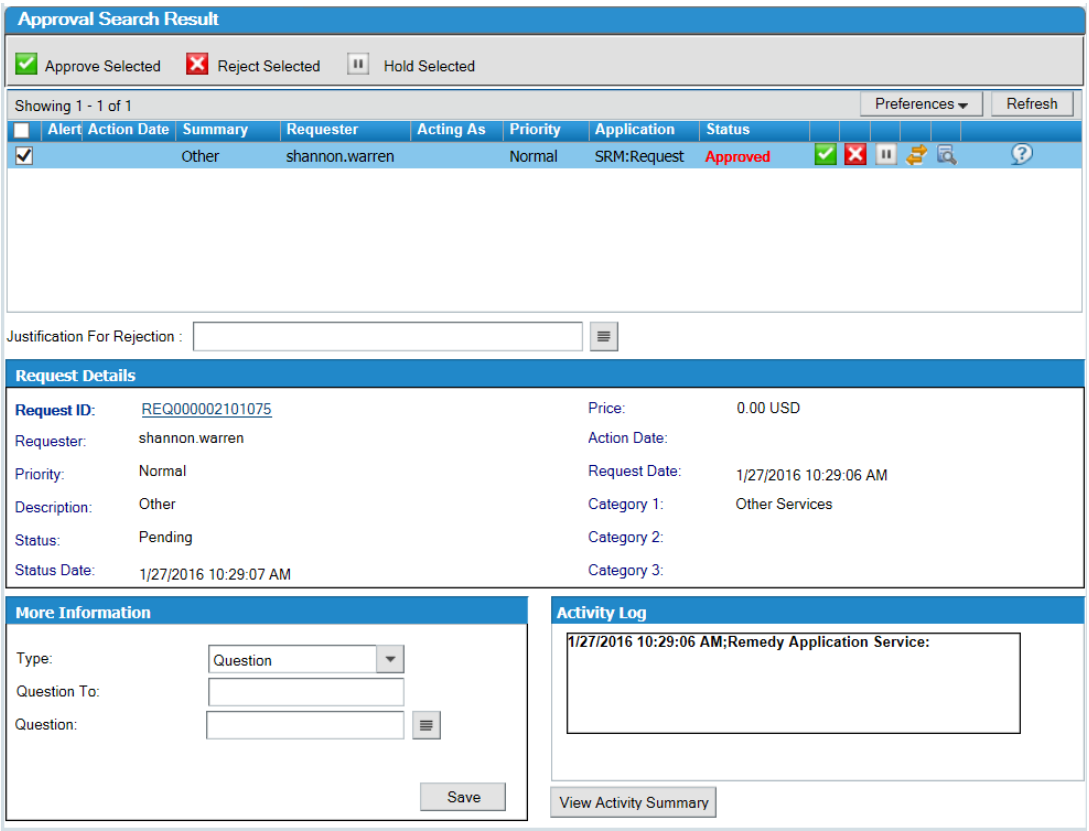
1. From SRM application console, click the *Settings* icon, and select *Approval Central.*



[Figure 3.1.1: Settings icon and Approval Central]

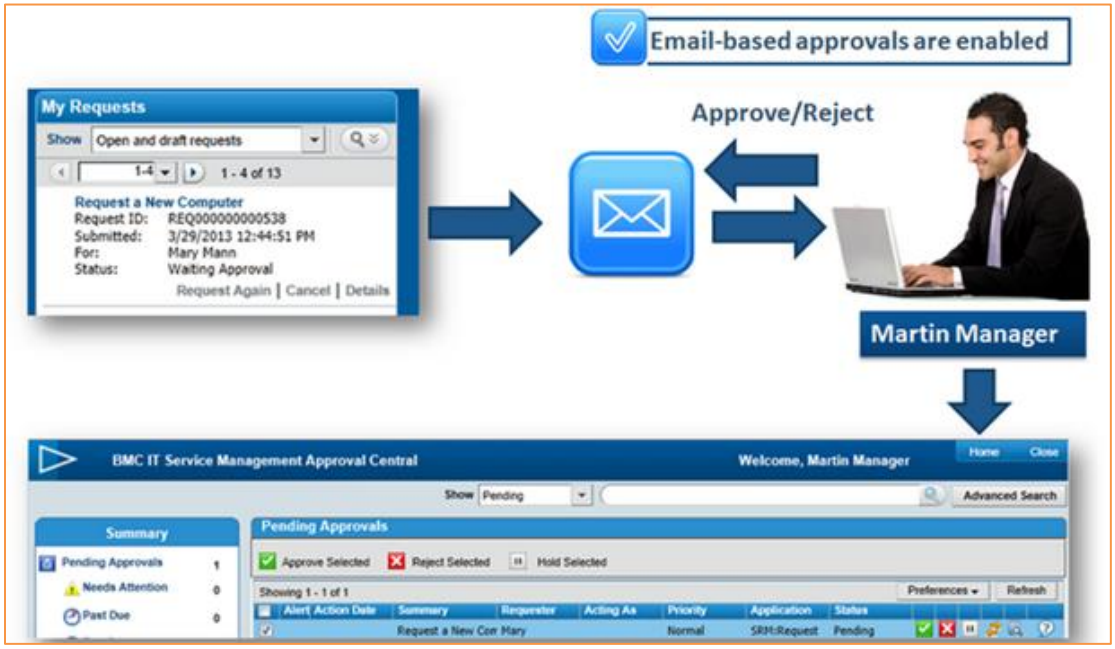
2. Select the request(s) by highlighting the request. Click the *Approve Selected* or *Reject Selected* button, the *Approve* or *Reject* icon, or the *Approval Details* icon. The status of the request immediately changes to *Approved* or *Rejected*.

3. If the service request is rejected, enter the reason or comment for rejection in the *Justification For Rejection* field **before** selecting the *Reject* icon (Figure 3.1.2).



[Figure 3.1.2: Approval Central Window]

Approvers receive email notifications indicating that their approval is needed. Within the email notification there is a link to *Approval Central,* where the service request may be approved.



[Figure 3.1.3: Email based approval workflow]

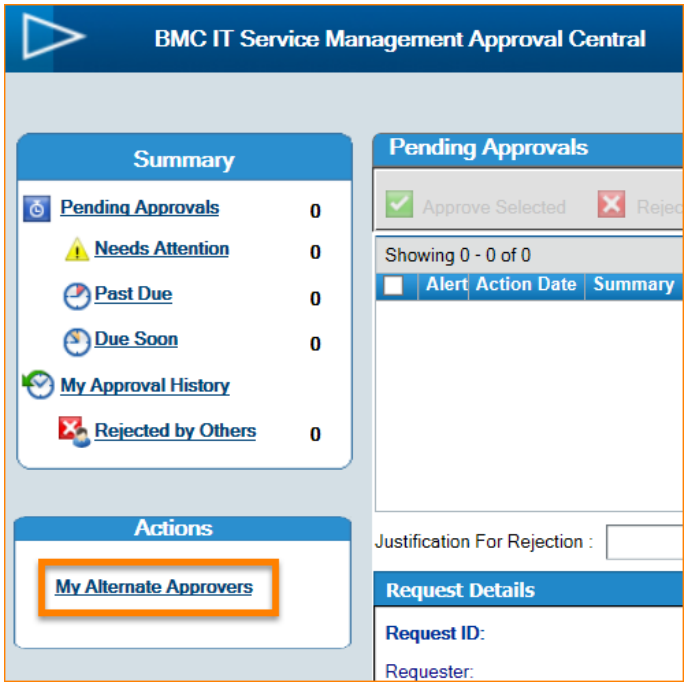
3.2 Alternate Approver Maintenance

There are times when a designated approver will be temporarily unavailable, and an alternate approver will need to be set up in their place. Only the designated approver can set up their alternate in SRM.

Follow the instructions below to set up alternate approvers.

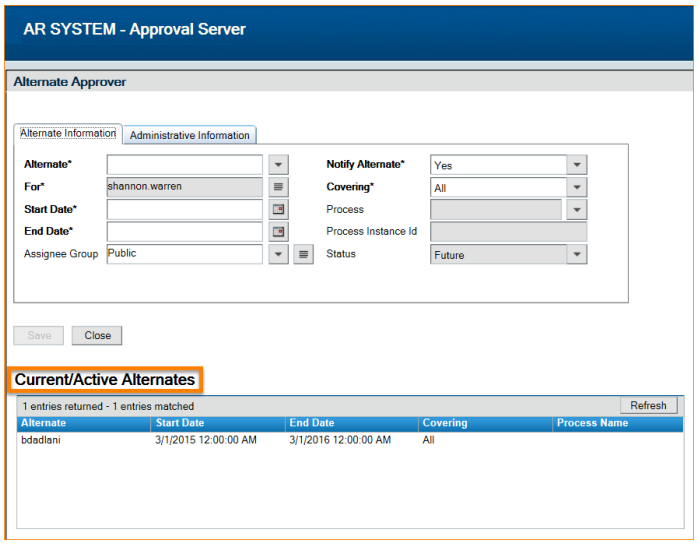
3.2.1 Navigation

1. From the Approval Central, select 'My Alternate Approvers' from the left navigation bar (Figure 3.2.1).



[Figure 3.2.1: My Alternate Approvers link]

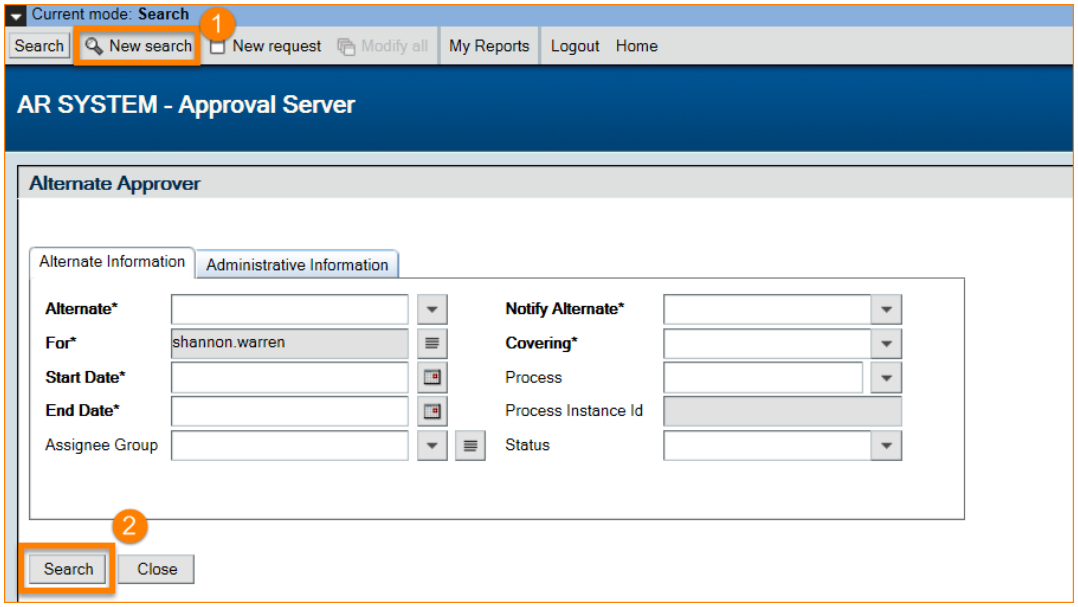
2. If any alternates were configured previously, they will appear on the table towards the bottom of the window (Figure 3.2.2).



[Figure 3.2.2: My Alternate Approvers window]

3.2.2 Search

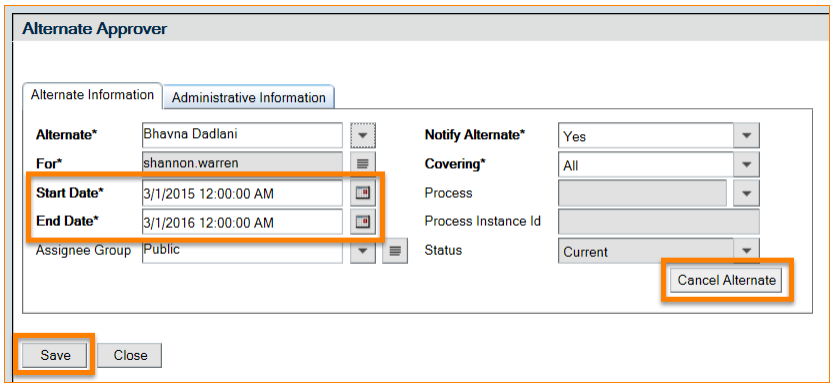
1. If you wish to search for entries rather than use the table, click the New Search button and then Search. The system will retrieve all your alternates (Figure 3.2.3).



[Figure 3.2.3: My Alternate Approvers link]

3.2.3 Update

1. After successfully retrieving an existing entry, you can modify the contents and select Save. For example, you may wish to change the Start/End Dates or cancel the alternate altogether (Figure 3.2.4).

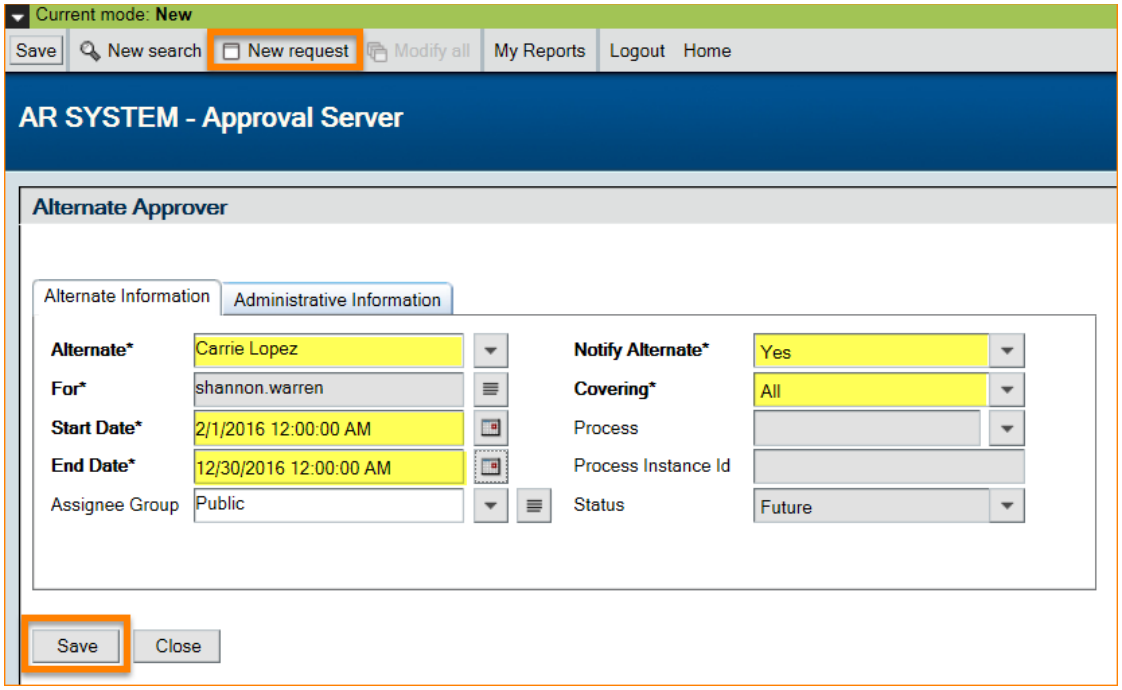


[Figure 3.2.4: Modifying or cancelling an alternate approver]

3.2.4 Add

1. If you wish to add a new entry, select the *New Request* button and complete all fields in bold. When ready, select Save to create the new entry (Figure 3.2.5).

   NOTE: Internal users may not want to provide their alternates control of both change and SRM approvals. Refer to the Addendum for Internal users, for details regarding how to provide specific control.



[Figure 3.2.5: Modifying or cancelling an alternate approver]

4.0 Managing Service Requests

This chapter provides instructions on managing service requests inside the SRM application. When users submit service requests, they are displayed in the *My Requests* pane of the SRM application. The *My Requests* pane provides a number of features to help the users track service requests, including: adding notes to an existing service request, requesting a service request again, canceling a service request, and viewing the details of a service request.

4.1 Track Service Requests

4.1.1 View Service Requests

To view requests by status type, select one of the following options from the *Show* drop-down list on the *My Requests* pane:

- **All** — All submitted requests regardless of their status.
- **Open and Draft Requests** — Requests that have not yet been closed and requests that have not yet been submitted.
- **Requests Needing Attention** — Requests for which a fulfillment worker has created an entry in the request's *Activity Log* for the CDT staff to read**.**
- **Recently Closed Requests** — Requests that were recently closed because they were fulfilled or because they were rejected.
- **Requests Closed Since Last Login** — Requests that were closed since the last time the user logged onto SRM application console.
- **Closed Requests** — All your closed requests.

To view details of a specific service request, follow the instructions below:

1. In the *My Requests* pane, click the record name or click *Details*. The *Details* tab displays information to help identify the request (see table below). This includes the request ID and turnaround time. The *Activity Log* panel on the right displays comments entered by all users.
2. To view the approval information such as the approvers, approval status, and the justification for approving or rejecting the request, click the *Additional Details* tab.
3. CDT fulfillers are able to view the process steps and fulfillment applications behind the request offering by clicking the *Process View* tab. When selecting an object in the *Process Detail* window, its properties, such as the fulfillment details, will display in the panel on the right.

4. Click *Close* to close the detail window.

Request Status	Description
Draft	The request has been created but has not been submitted yet.
In Review	The request has been submitted and is being reviewed.
Pending	Work on the request has been temporarily suspended. You must specify a status reason (Approval or More Information) when the status is Pending.
Waiting Approval	The request has been submitted and is pending approval. A request goes into Initiated status when all of the approvers have approved it. After the request is approved, its status changes to In Progress.
Initiated	Includes planning the work approved for implementation, targeting dates, and estimating costs.
In Process	CDT service providers work on the requests. They log their progress as they implement the request and perform any tasks included in it.
Completed	The request is updated to Completed when it is closed in the fulfillment application. Users can reopen a completed request. Refer to section 4.5 for details.
Rejected	The approver rejects the service request. The SR can be reopened, which restarts the approval process.
Cancelled	The request is cancelled by the requester.
Closed	Once the request is fulfilled and is in the completed status the request is automatically closed after 15 days.

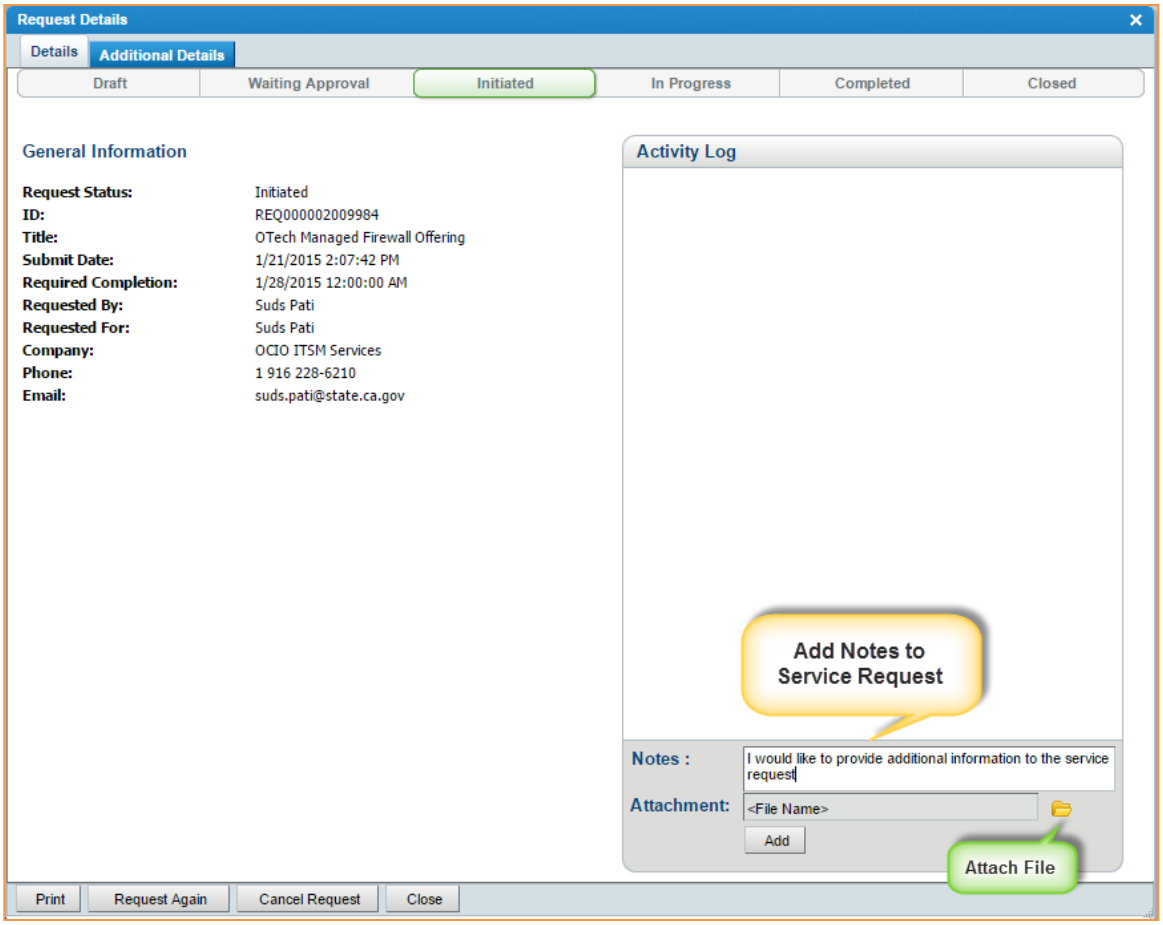
4.1.2 Add Notes to Service Requests

All users can add notes to the service requests.

Follow the instructions below to add notes to a service request.

1. Open the request from the *My Requests* pane. The *My Request Detail* form appears.
2. Enter the text in the *Notes* field.
3. To add an attachment:
    a. Click the folder icon next to the *Attachment* field.
    b. In the *Add Attachment* dialog box, browse for the file, and click *OK*.
    c. A maximum of one attachment can be added for each activity record, but the request can include multiple activity records.
    d. To delete an attachment that was just added, click the *Remove File* icon .
4. Click *Add*.

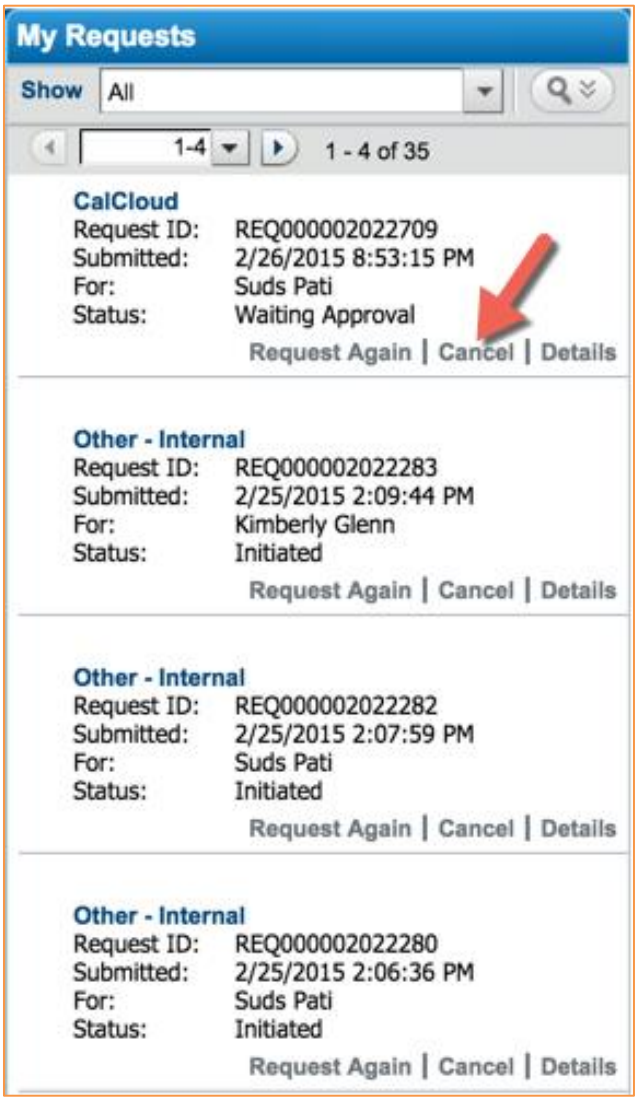
The attachment displays in the *Activity Log* field along with an activity log entry that your action generated (Figure 4.1.2).



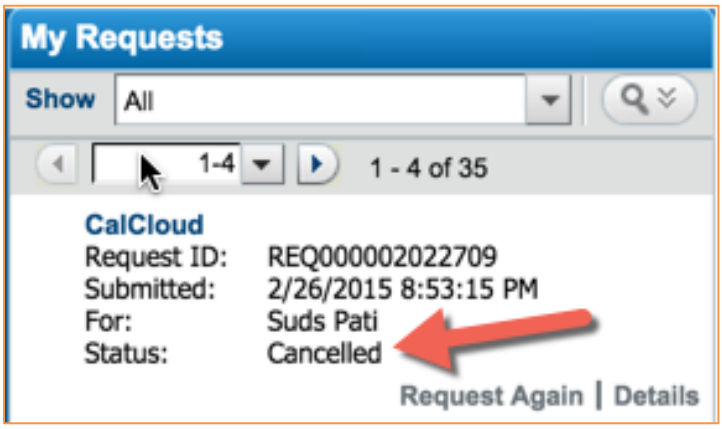
[Figure 4.1.2: Add notes to a service request]

4.2 Cancel a Service Request

To cancel a service request, select that request from the *My Requests* pane and click on the *Cancel* link. A service request can also be cancelled from the *Request Details* window by clicking the *Cancel Request* button, a *Message Box* appears for confirmation (Figure 4.2.1). Click *Yes* to confirm the cancellation. The cancelled request appears in the *My Requests* pane with a status as Cancelled (Figure 4.2.2).



[Figure 4.2.1: Cancelling a service request from My Requests pane]



[Figure 4.2.2: Service request showing Cancelled status in the My Requests pane]

4.3 'Request Again' Service Requests

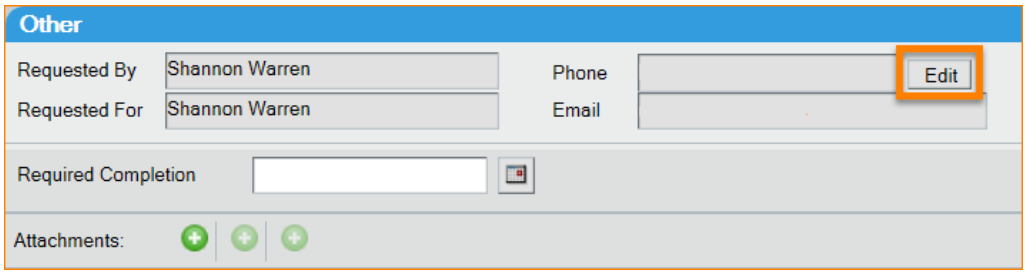
User can quickly create a new service request that is similar to a previously submitted request by using the *Request Again* function. A request can be copied regardless of its status (draft, submitted, or canceled).

When a request is copied, most of the information in the original request is transferred into the new request, including attachments. The date and time field values are not copied because they might not be valid for the new request. Similarly, static values, such as options in a drop-down list, are not copied if they were revised after the original request was submitted.

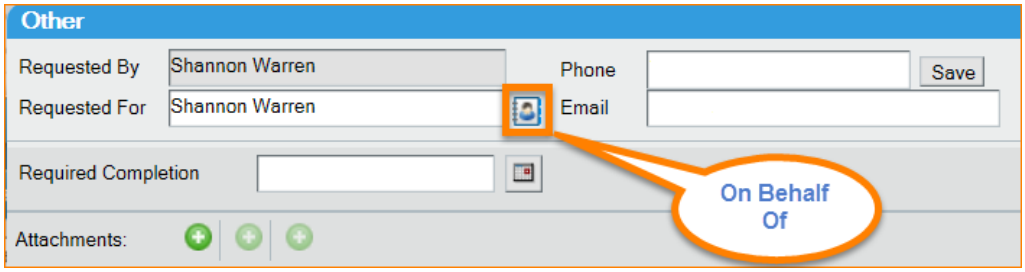
Follow the instructions below to copy a request:

1. In the *My Requests* pane, click *Details* to identify the request to be copied, on the *Request Details* form, click *Request Again*. The *Provide Information* form appears with the data populated from the previous request with the exception of all date and time related fields. Date and Time fields will need to be populated with an appropriate value for the new request.
2. Perform one of the following actions:
    a. To submit the new request at a later date, click *Save as Draft*.
    b. To submit it immediately, click *Submit*.

c. To submit the request on behalf of another user, click *Edit* (Figure 4.2.3) located to the right of the phone number field and click the *Request on Behalf Of* button at the top of the *service request* form to the right of the *Requested For* name (Figure 4.2.4).



[Figure 4.2.3: Edit button]



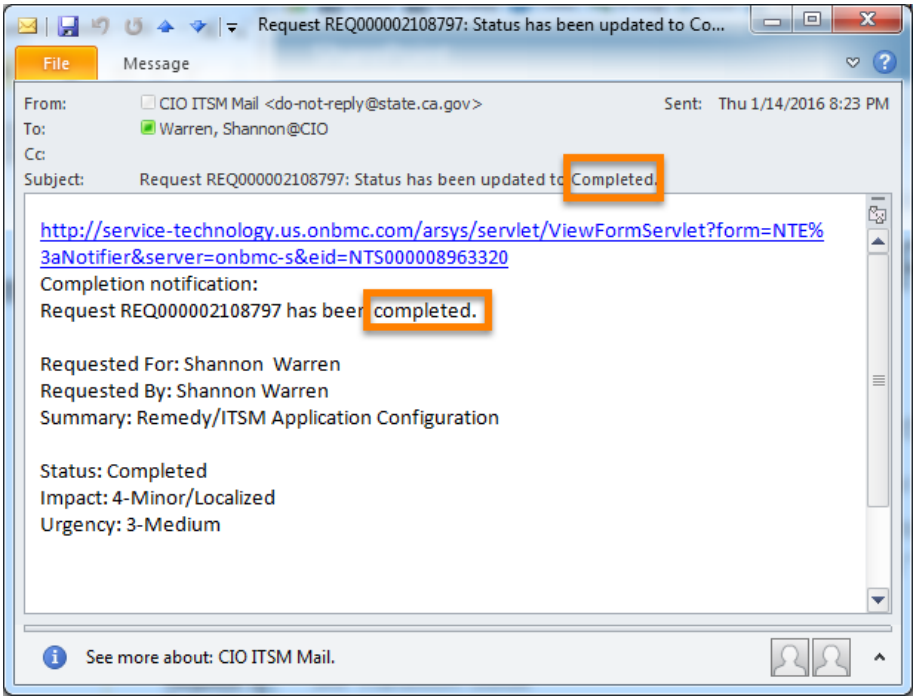
[Figure 4.2.4: Request On Behalf Of another user button]

The system creates a new request, with a unique *Request ID* and lists it on the *My Requests* pane. For draft requests, the system displays the *Complete* option along with a pencil icon.

3. To edit a draft request, click *Complete* to view and modify the request details.

4.4 Service Request *Completed* Email Notification

When your Service Request has been completed, you will receive an email from "CIO ITSM Mail <do-not-reply@state.ca.gov>" (Figure 4.4.1).



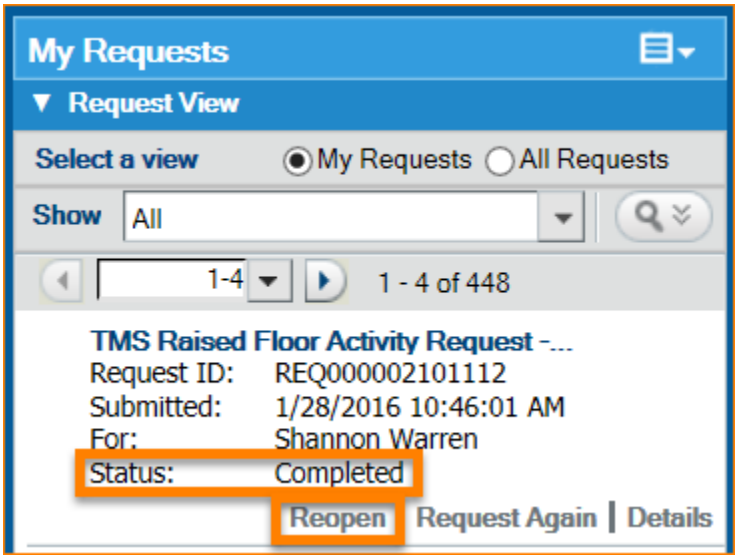
[Figure 4.4.1: Email notification informing you that the Service Request has been completed]

From the date that the service request is completed, you will have 15 days until the request is auto-closed by Remedy. If the request was not completed to your satisfaction, you will need to re-open it.

4.5 'Re-Open' Completed Service Requests

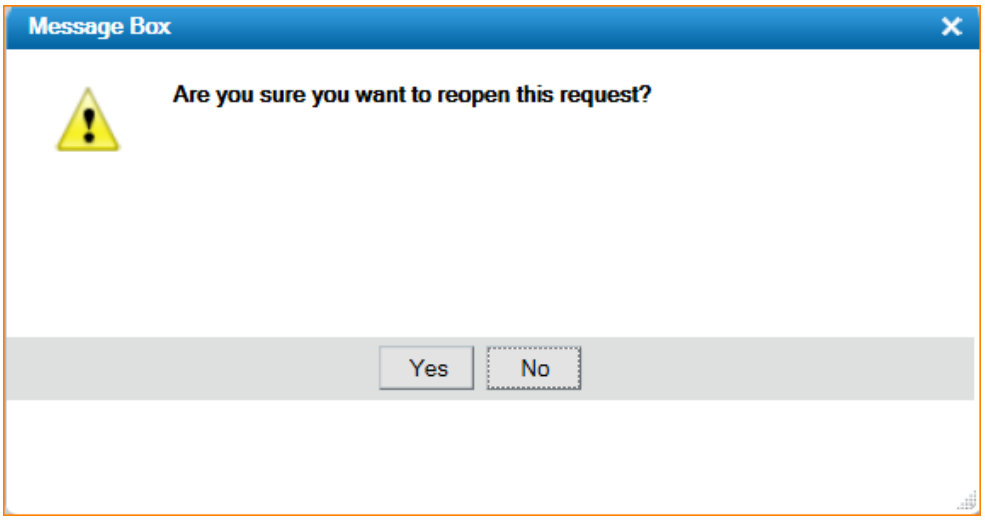
Follow the instructions below to Reopen your request:

1. Within 15 days of request being closed, if it has not been completed to your satisfaction, you can add additional information and/or attach a file to the Activity Log Entry. You may locate the request from the *My Requests* pane and choose "Reopen" (Figure 4.5.1).



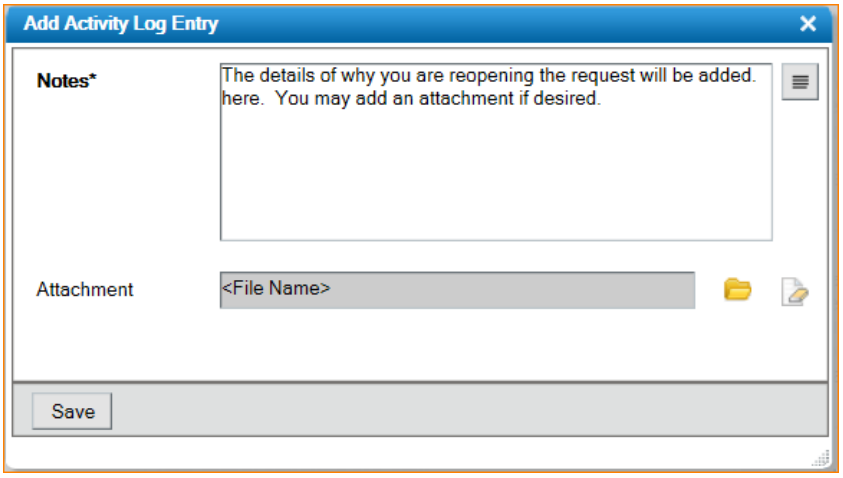
[Figure 4.5.1: My Requests pane with option to Reopen]

2. Select 'Yes" when prompted (Figure 4.5.2).



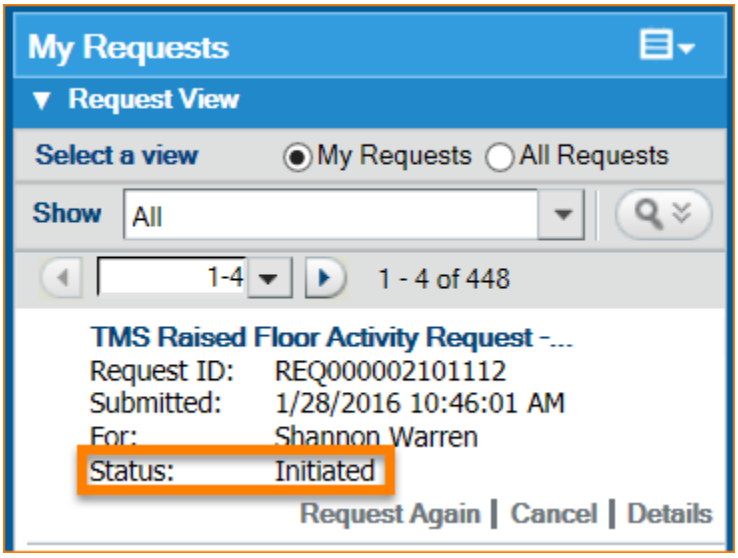
[Figure 4.5.2: Confirmation prompt to Reopen the Service Request*]*

3. Add an Activity Log Entry to indicate why you are Reopening the request. If desired, you may attach a file with additional information (Figure 4.5.3).

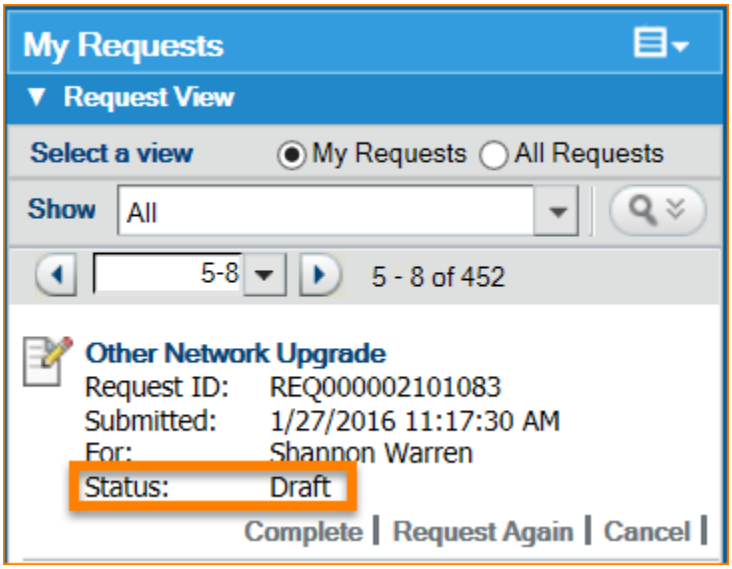


[Figure 4.5.3: Details of why you are reopening the Service Request]

4. Depending upon the *Status* of the service request when *Reopen* was clicked, the status of the service request will change to either *Initiated* (Figure 4.5.4) or *Draft* (Figure 4.5.5).

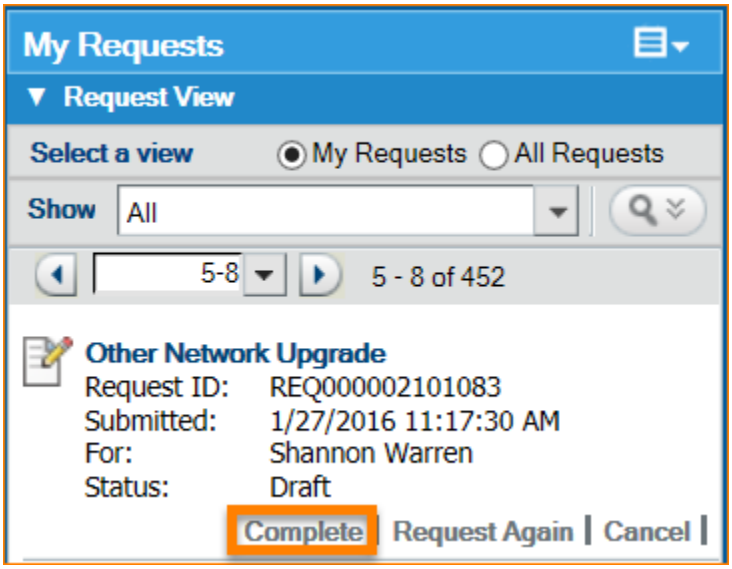


[Figure 4.5.4: Service Request status changes to Initiated]



[Figure 4.5.5: Service Request status changes to Draft]

5. When the *Status* changes to *Initiated* (Figure 4.5.4), the Service Desk will be contacted. When the *Status* changes to *Draft* (Figure 4.5.5), you are then able to select *Complete* (Figure 4.5.6), so that you may make the necessary adjustments before re-submitting the service request.



[Figure 4.5.6: Service Request option for Complete]