ServiceLink Navigation for Fulfillers
Trainer Introduction

Kathleen Cool
Title: Principal Trainer
Department: HR | UCPath
Years @ UC: 1 year
Previous Experience: 10+ years of experience in instructional design and training in higher education. Taught Information System Management at the undergraduate and graduate levels.
Your Questions and Input

https://tinyurl.com/ucrtraining
Housekeeping

- Cell Phones
- Breaks
- Restrooms
Learning Topics

- ServiceLink Navigation Basics
- Navigating the Banner Frame
- Exploring the Application Navigator
- ServiceLink Roles & Provisioning
- Using Lists in ServiceLink
- Using Forms in ServiceLink
- Understanding the Fulfiller View
- Why Tasks Matter
- Additional Courses
- Training Resources
ServiceLink
Navigation Basics
ServiceLink access in R’Space

The ServiceLink Portal can be accessed via R’Space under Tools as well as under Authorized Apps.
Click on the “Login” tab to login with your single sign-on UCR credentials. Upon login, you will be re-directed to the ServiceLink Fulfiller View if you are provisioned as a Accountability Structure or SSC Fulfiller in EACS.

To access both the ServiceLink Portal and Fulfiller View simultaneously, you will have to have two browser tabs open – One with the ServiceLink Portal (URL - https://ucrsupport.service-now.com/ucr_portal/) and the other with the ServiceLink Fulfiller View (URL - https://ucrsupport.service-now.com)
ServiceLink Navigation

1. Banner Frame
2. Application navigator
3. Content Frame
Navigating the Banner Frame
## Banner Frame

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banner Frame</td>
<td>Runs across the top of every page and contains the UCR logo and the following information, controls, and tools.</td>
</tr>
<tr>
<td></td>
<td>• The User Menu provides options to access your profile and preferences.</td>
</tr>
<tr>
<td></td>
<td>• Global text search icon finds records from multiple tables.</td>
</tr>
<tr>
<td></td>
<td>• Connect sidebar icon lets you begin or continue conversations.</td>
</tr>
<tr>
<td></td>
<td>• Help icon If there is no embedded help, it offers help search options.</td>
</tr>
<tr>
<td></td>
<td>• Gear icon opens the System settings for the user interface (UI).</td>
</tr>
</tbody>
</table>
System settings for the UI

You can define system settings to customize the UI for yourself. The gear icon, located within the banner frame, displays the settings pop-up window. The system settings are organized by tab, as follows:

**General**

- **Accessibility enabled**
  - More advanced accessibility features are activated when this setting is enabled. The platform is designed to be accessible by default. Enabling this feature makes more accessibility features available.

- **Compact the user interface**
  - The UI is optimized to display more information in the browser window when this setting is enabled.

- **Compact list date/time**
  - Date and time values appear in compact format when this setting is enabled. The year is not shown for date values within the current year, and seconds are not shown for time values. This setting is not available if the Date/Time selection is Time Ago.

**Lists**

**Forms**

**Notifications**

**Home module**

- Determines whether the Home module opens Homepages or Dashboards.

**Date/Time**

- **Calendar**
  - The format in which dates and times appear depends on this setting. Select Calendar (for example, 2015-11-13, 15:58:58), Time Ago (for example, 11 minutes ago), or Both.

- **Time zone**
  - Select a time zone or return to the default time zone.

**Printer friendly version**

- Opens a printer friendly version of the current content frame.
System settings for the UI (cont.)

Select a theme for the user interface. Select the System theme to return to the default theme.
System settings for the UI (cont.)

<table>
<thead>
<tr>
<th>System Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General</strong></td>
</tr>
<tr>
<td><strong>Theme</strong></td>
</tr>
<tr>
<td><strong>Lists</strong></td>
</tr>
<tr>
<td><strong>Forms</strong></td>
</tr>
<tr>
<td><strong>Notifications</strong></td>
</tr>
</tbody>
</table>

- **Wrap longer text in list columns**
  - Long strings wrap in list columns instead of appearing as one long line when this setting is enabled.
System settings for the UI (cont.)

Form sections and related lists appear in tabs when this setting is enabled.

Related list loading
- **With the Form**
- **After Form Loads**
- **On-demand**

Determine when related lists load on forms:
- **With the Form** – Related lists load when you open the form, which is the default setting.
- **After Form Loads** – Related lists load after the rest of the form loads.
- **On-demand** – Related lists load on demand. When this option is selected, a **Load Related Lists** button appears at the bottom of each form that contains related lists. Click the button to load related lists.
System settings for the UI (cont.)

Users can receive Connect notifications on mobile devices when this setting is enabled.

Users can receive Connect desktop notifications when this setting is enabled.

Users can receive Connect email notifications when this setting is enabled.

Users can receive Connect audio notifications when this setting is enabled.
Exploring the Application Navigator
Application Navigator

The application navigator appears at the left of the interface and provides access to all available applications and modules, favorites, and recently viewed items. The application navigator consists of a navigation filter and the following tabs:

<table>
<thead>
<tr>
<th>Tab Name</th>
<th>Tab Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Applications</td>
<td>![application icon]</td>
<td>Displays all application menus and modules. Each application appears as a section in the application navigator denoted by an application label. The tab lists modules by name under each application label.</td>
</tr>
<tr>
<td>Favorites</td>
<td>![favorite icon]</td>
<td>Displays items you have added as favorites.</td>
</tr>
<tr>
<td>History</td>
<td>![history icon]</td>
<td>Displays items you have recently accessed.</td>
</tr>
</tbody>
</table>

Enter text in the navigation filter to show matching applications, modules, and favorites. Matching favorites appear at the top of the results. You can also use the navigation filter to quickly access a specific table.
Modules vs. Applications

The All Applications tab displays all application menus and modules. Each application appears as a section in the application navigator denoted by an application label (1). The tab lists modules (2) by name under each application label. ServiceLink Portal Transactions appear under the Service Catalog Application. Reported Incidents appear under the Service Desk Application.

Depending on the chosen Application, the corresponding List and Forms will look different and may have different affordances.

Additional information on the similarities and differences of list and forms under specific applications is discussed later in this training, alongside Lists and Forms.
Using the Application Navigator

Everyone can collapse and expand the navigator, work with favorites, and view navigation history.

Collapse or expand information in the Application Navigator

You can collapse or expand information in the application navigator to display only what you want to see.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collapse or expand an application or</td>
<td>Click the application or application section label.</td>
</tr>
<tr>
<td>application section</td>
<td></td>
</tr>
<tr>
<td>Collapse or expand all applications</td>
<td>Double-click the all applications tab icon</td>
</tr>
<tr>
<td>Collapse or expand the application navigator</td>
<td>Click the arrow icon at the bottom of the application navigator. In the</td>
</tr>
<tr>
<td></td>
<td>collapsed view, the application navigator displays favorites only. Click</td>
</tr>
<tr>
<td></td>
<td>the filter icon or the arrow icon in the collapsed view to expand the</td>
</tr>
<tr>
<td></td>
<td>application navigator.</td>
</tr>
</tbody>
</table>

Collapsed navigator
## Adding Favorites

You can add, edit, or delete favorites for frequently accessed items in the application navigator. Items you add as favorites appear in the favorites tab of the application navigator, represented by a star icon. Favorites also appear in the collapsed view of the application navigator as icons.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Add a module as a favorite</strong></td>
<td>In the application navigator, click on the star icon by a module.</td>
</tr>
<tr>
<td><strong>Add all the modules under an application as favorites</strong></td>
<td>In the application navigator, click the star icon by an application</td>
</tr>
</tbody>
</table>
| **Add a list as a favorite using the list** | 1. Open a list  
2. Click the list context menu icon by the list title  
3. Select Create Favorite  
4. In the flyout, edit the name and icon as needed |
| **Add a list as a favorite by dragging and dropping** | 1. Open a list  
2. Drag a breadcrumb to the **Favorites** tab of the application navigator |
Using the Application Navigator (cont.)

Editing and Deleting Favorites

To edit or delete a favorite, complete any of the following actions:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| Reorder favorites in the list       | 1. At the bottom of the application navigator, click **Edit Favorites**  
2. Drag a favorite to a new location in the list  
3. Click **Done** or **Edit Favorite** |
| Customize the name or icon for a favorite | 1. At the bottom of the application navigator, click **Edit Favorites**  
2. Click a favorite  
3. Customize the name and icon as needed  
4. Click **Done** or **Edit Favorite** |
| Delete a favorite                    | 1. Point to the favorite  
2. Click the remove favorite icon |
View your navigation history

You can view your navigation history in the application navigator. Items you have accessed recently appear in the history tab of the application navigator, which is represented by a clock icon. Items appear in chronological order from most to least recently accessed.

1. In the application navigator, click the history tab, which is represented by a clock.
2. Click an item to open it.
Using the Application Navigator (cont.)

Filter Navigator

The Filter Navigator can help you filter applications within a given module. For example, you can filter for Requests, RITMs, and Tasks:

<table>
<thead>
<tr>
<th>What you're looking for:</th>
<th>Keyword</th>
<th>List Filter/Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request (i.e., REQ001248)</td>
<td>Requests</td>
<td>Number, Requested For, Assigned To, Opened, Updated, Short Description, Request State, Due Date, State</td>
</tr>
<tr>
<td>RITM (i.e., RITM0010309)</td>
<td>Items</td>
<td>Number, Item, Stage, Request, Description, Requested For, Opened By, Assignment Group, Assigned To, Opened, Due Date</td>
</tr>
<tr>
<td>Task (i.e., SCTASK0010402)</td>
<td>Tasks</td>
<td>Number, Priority, State, Short Description, Assignment Group, Assigned To</td>
</tr>
</tbody>
</table>
ServiceLink Roles & Provisioning
1: Department Initiator → ServiceLink Forms (HR/AP)

2: Department Fulfiller → ServiceLink Fulfiller View

3: FAU Approver → ServiceLink Fulfiller View

4: AP/HR Central Office → ServiceLink Fulfiller View

5: SSC Fulfiller → ServiceLink Fulfiller View
ServiceLink Essential Roles

1: Department Initiator → ServiceLink Forms (HR/AP)

2: Department Fulfiller → ServiceLink Fulfiller View

3: FAU Approver → ServiceLink Fulfiller View

4: AP/HR Central Office → ServiceLink Fulfiller View

5: SSC Fulfiller → ServiceLink Fulfiller View

EACS for ServiceLink Department Initiator are assigned by ServiceLink form.

Application Roles for Department Initiator are:

- Extended Leave Initiator
- Generic Initiator
- Offboarding Initiator
- Onboarding Initiator
- Position Management Initiator
ServiceLink
Essential Roles

1: Department Initiator → ServiceLink Forms (HR/AP)

2: Department Fulfiller → ServiceLink Fulfiller View

3: FAU Approver → ServiceLink Fulfiller View

4: AP/HR Central Office → ServiceLink Fulfiller View

5: SSC Fulfiller → ServiceLink Fulfiller View

EACS for ServiceLink Department Fulfiller are assigned by ServiceLink form.

Application Roles for Department Fulfiller are:

- Extended Leave Accountability Structure Fulfiller
- Offboarding Accountability Structure Fulfiller
- Onboarding Accountability Structure Fulfiller
EACS for ServiceLink FAU Approver is assigned only to Financial Managers/Analysts.

Application Role for Department FAU Approver is:

- Position Management

FAU Approver

1: Department Initiator → ServiceLink Forms (HR/AP)

2: Department Fulfiller → ServiceLink Fulfiller View

3: FAU Approver → ServiceLink Fulfiller View

4: AP/HR Central Office → ServiceLink Fulfiller View

5: SSC Fulfiller → ServiceLink Fulfiller View
ServiceLink Essential Roles

1: Department Initiator → ServiceLink Forms (HR/AP)

2: Department Fulfiller → ServiceLink Fulfiller View

3: FAU Approver → ServiceLink Fulfiller View

4: AP/HR Central Office → ServiceLink Fulfiller View

5: SSC Fulfiller → ServiceLink Fulfiller View

New Position requests and Updates to Positions are routed to the AP or HR Central Office for approval if:

- FLSA Override is used
- Employee Relations Code is Confidential

Once approved, the request will then be routed to the appropriate Shared Services Center for fulfillment.
ServiceLink
Essential Roles

1: Department Initiator → ServiceLink Forms (HR/AP)
2: Department Fulfiller → ServiceLink Fulfiller View
3: FAU Approver → ServiceLink Fulfiller View
4: AP/HR Central Office → ServiceLink Fulfiller View
5: SSC Fulfiller → ServiceLink Fulfiller View

EACS for ServiceLink Shared Services Centers Fulfiller are assigned by ServiceLink form.

Application Roles for SSC Fulfiller are:

• Extended Leave Shared Services Fulfiller
• Generic Shared Services Fulfiller
• Job Data Change Shared Services Fulfiller
• Offboarding Shared Services Fulfiller
• Onboarding Shared Services Fulfiller
• Payroll Adjustments Shared Services Fulfiller
• Position Management FAU Shared Services Fulfiller
• Position Management Shared Services Fulfiller
Using Lists in ServiceLink
Lists

A list displays a set of records from a table. Users can search, sort, filter, and edit data in lists. Lists may be embedded in forms and may be hierarchical (have sublists).

The list interface consists of a title bar, filters and breadcrumbs, columns of data, and a footer. Each column in a list corresponds to a field on the table.
List Features and Actions

- List title menu
- Personalize list icon
- Search fields
- Reference icon
- Activity stream
- Page controls in title bar
- Sort column heading
- Action on selected rows
- Number of list rows per page
Sorting Column Headings

You can click the column name to sort the list in ascending order. Click again to sort in reverse order. An arrow by the column name indicates the column currently being sorted as well as the sort direction. A downward pointing arrow indicates that the column is sorted in descending order. Columns can also be sorted using the list column context menu:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filters</td>
<td>Changes the values in the filter. Some of the choices are: None, Active, and Edit personal filters.</td>
</tr>
<tr>
<td>Group by</td>
<td>Group records in a list by the values in a selected field from that table. Any field from the table can be used as a group filter, whether or not it appears in the list.</td>
</tr>
<tr>
<td>Show</td>
<td>Changes the number of rows shown on each page of the list.</td>
</tr>
<tr>
<td>Refresh List</td>
<td>Refreshes the link to show changes immediately.</td>
</tr>
<tr>
<td>Create favorite</td>
<td>Adds a link to this list to your favorites.</td>
</tr>
</tbody>
</table>
Activity Streams in List View

To view the activity stream information, click the list activity stream icon in the list title bar. This icon appears in the title bar for all task tables.

The activity stream information appears in a flyout window. The short descriptions appears as the title for the entry. Activity stream items on the task table use the task number as the title. The information in the flyout window updates automatically with audit and journal entries. Click the >> icon at the top to close the activity stream.

You can add a comment to any item in the activity stream. When you point to the item with your cursor, a Comment button appears.

You can click an item to open the activity stream for that record. The record activity lets you open the task record, post additional comments or work notes, or preview images. Click the >> icon at the top to close the record activity stream.
Search a List

There are two options for searching a list: for a string in a selected field, or for a text string found in any field. These options are labeled Go To and Search.

- The Go To option sorts the list by the selected field and returns records where the field value is equal to or greater than the search term. For Number field, which is a string type field, it finds the records that have a number ending with the number that you enter. For example, searching a list of incidents by selecting Number and entering 4 shows records with numbers like INC0000004 and INC0000014.
- The Search option appears when you select for text. It returns records that contain the search term in any field in the list table.

Each option in a choice list is defined with a column label and value. For example, the incident State field contains several options, such as New and Closed. These labels are column labels, and each one has an underlying value. For incidents, the default value for New is 1 and the default value for Closed is 7. You can search a column for either the column label or the value with the following results.
- Enter the column label to list matching records, for example all incident records in the New state.
- Enter the value to find records that have a state greater than or equal to (=>) the specified value. For example, enter 6 to list incidents in the Resolved and Closed states.

1. Navigate to a list of records
2. If necessary, personalize the list to add the desired fields
3. Select a field or select for text
4. Enter the search text. Use wildcards to further refine list searches
5. Press the Enter key to execute the search
Search by one or more columns in a list

This search supports queries that include AND, but does not support OR. You cannot search in a column that uses the List field type.

1. Click the search icon to expand the column headers and ass a search field to each column
2. To search a single column, enter the search text in the desired column search field and press the Enter key
3. Use wildcards to further refine column searches. For example, use * to define a contains search
4. To search multiple columns, perform one of the following actions:
   • Enter the search text is each of the desired columns search fields and press the Enter key
   • Search an individual column then search additional columns based on the results of the first search

To clear a column search, complete one of the following actions:

• Delete the text in the search field for the desired column and press the Enter key. This returns results for any remaining column search criteria
• Delete the text in all the column search fields to return all records in the list
Available List Search Wildcards

ServiceLink supports several wildcard characters to expand and refine search results.

<table>
<thead>
<tr>
<th>Wildcard</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*search-term</td>
<td>Search for values that contain search-term</td>
</tr>
<tr>
<td>%search-term%</td>
<td>Search for values that end with search-term</td>
</tr>
<tr>
<td>search-term%</td>
<td>Search for values that start with search-term</td>
</tr>
<tr>
<td>=search-term</td>
<td>Search for values that equal search-term</td>
</tr>
<tr>
<td>!*search-term</td>
<td>Search for values that do not contain search-term</td>
</tr>
<tr>
<td>!%search-term</td>
<td>Search for values that do not end with search-term</td>
</tr>
<tr>
<td>!=search-term</td>
<td>Search for values that do not equal search-term</td>
</tr>
</tbody>
</table>
Searching without Wildcards

If you enter text in the search box without using a wildcard, the search returns results for values greater than or equal to the value you enter.

- For text data-type-fields, this means that the search first sorts the records on the selected field, then finds the first record that starts with the text and all following records.
- For numeric type-fields, this means that the search finds all records where the number field ends with the entered number.

NOTE: ServiceLink treats some string fields that contain record numbers as numeric fields. Any field with the name number is treated as a numeric field. The field label has no effect on search results.
Grouped Lists

Grouping aggregates a list by a field and displays the record count per group. Grouping can help you find data quickly by organizing and providing a summary of search or filter results.

For example, this screenshot shows Requested Items grouped by Short Description:

- Short description: Allows copying of content areas (assignments, materials, announcements, syllabus), settings, and/or rosters from one course to another (3)
- Short description: Change, Extend, or Place On Leave and Return to Work (19)
- Short description: Course Merge (1)
- Short description: Equipment Setup (11)
- Short description: Generic Request (67)
- Short description: Grant user access to iLearn (9)
Using a Grouped List

You can find information by grouping a list by a particular field. After grouping items in a list, several options let you focus on a particular group or set of groups.

Use one of the following methods to group and ungroup items in a list:
- On the title bar, click the context menu and select **Group By**. Select the field by which to group the list. To remove a grouping, select **-None-**.
- Right-click the column name and select **Group By**. To remove a grouping, select **Ungroup**.

Use any of the following actions to expand the groups

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To expand or collapse a group</td>
<td>Click the arrow next to the group name</td>
</tr>
<tr>
<td>To expand or collapse all groups</td>
<td>Click the arrow at the top of the list</td>
</tr>
<tr>
<td>To open the full list for a group</td>
<td>Click the group name</td>
</tr>
<tr>
<td>To see all records for a given group</td>
<td>Open the full list</td>
</tr>
</tbody>
</table>

**NOTE:** The maximum number of records shown per group is the number of records per page in list view.
Filters and Breadcrumbs

A filter is a set of conditions applied to a table to help you find and work with a subset of the data in that table. You can apply, modify, create, and save filters. A hierarchical list of conditions at the top of the table – breadcrumbs – indicates the current filter.

Breadcrumbs offer a quick form of filter navigation. They are ordered from left to right. The left condition is the most general, and the right condition is the most specific. Clicking a breadcrumb removes all the conditions to its right. Clicking the condition separator (>) before a condition removes only that condition.

Examples:
- Clicking Closed on Today or on This Week removes the condition Short description starts with Position and returns all active request items with a closed date of today or this week.
- Clicking the condition separator (>) before Closed on Today or on This Week removes the condition and returns all active requested items.
- Clicking All removes all conditions and returns all requests in the system.

Click a breadcrumb to refresh the list of records and show the latest information for those records.
Quick Filters

To quickly filter a list using a value in a field, right-click in the field and select Show Matching or Filter Out. For date fields, choose Show Before, Show After, and Filter Out.

These functions add a condition to the right in the breadcrumb of the current filter.

In this example, right-clicking **Requested For** and selecting **Show Matching** adds the condition **Request Requested for =** as the most specific condition of the filter. By contrast, right-clicking **Requested For** and selecting **Filter Out** adds the condition **Request Requested for !=** as the most specific condition of the filter.

For date and date-time fields, you can also use Show After or Show Before to define a time-based filter.

Using the quick filter method to filter out a particular value builds the following conditions: [field] [is not] [value] or [field] [is] [empty]. Records that contain empty or null values still display in the filtered list. If you manually create a filter, it does not automatically include the OR condition [field] [is] [empty], so records that have an empty or null value do not display in the filtered list.
Filters

A filter restricts what records appear in a list by providing a set of conditions each record must meet to be included in the list.

A condition consists of the following parts:

- **Field:** Each field contains data from a particular column in the table. Selecting a reference field allows you to dot-walk to data from other tables.
- **Operator:** Each field type has its own set of valid operators. The operator determines if a value is needed.
- **Value:** Each field has its own set of valid values determined by the field type. Reference fields have access to auto-complete, and choice lists provide a list of options.
- **Grouping:** Each condition line is grouped with either an AND or OR connector. The filter requires all condition lines linked with an AND connector to be met. The filter separately evaluates each condition line linked with an OR connector.

To make the condition builder appear every time you open the list, you can click the pin/unpin icon.
Using the Condition Builder

1. Open the condition builder by:
   • Clicking the show/hide filter icon besides the breadcrumbs
   • If the icon is disabled and the breadcrumb has a related list condition in it, you must remove the related list condition to open the filter.

2. Select a field from the list:
   • The field type determines the available operators and values. For example, the Active field can have a value of true, false, or empty while a text field can have many different values. Similarly, the greater than operator does not apply to the Active field, but it does apply to the Priority field.

3. Select an operator from the list.
4. Select or enter a value, if appropriate.
5. Add or remove conditions to construct the desired filter by completing one or more of the following steps:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To add a top-level condition</td>
<td>Click AND or OR on the condition builder toolbar, above the conditions</td>
</tr>
<tr>
<td>To add a dependent condition</td>
<td>Click AND or OR beside the condition</td>
</tr>
<tr>
<td>To remove a condition</td>
<td>Click x beside the condition</td>
</tr>
</tbody>
</table>

NOTE: To find all records that do not contain the specific value, create a filter with two conditions: [field] [is not] [value] or [field] [is] [empty]
Using the Condition Builder (cont.)

1. To specify the sort order of the results, click **Add Sort** and then select a field to sort by and a sort order.
2. Options: Click **Save** to keep the filter for future use.
3. Click **Run** to apply the filter.

Save and use filters in a list view

1. Create or modify a filter in the filter interface
2. Click **Save**
3. Enter a name for the filter
4. Select your visibility options
   - Me – Creates a personal filter, which only you can access.
5. Click **Save**
6. To use a saved filter, select the filter name in the list title menu
   - The filter runs and the breadcrumbs appear
7. Click **Save**
8. To use a saved filter, select the filter name in the list title menu.
9. To edit or delete personal filters, select **Edit personal filters** from the title menu.
Personal Lists

You can create personal lists to customize which columns appear and the order in which they appear. Personal lists modify a specific list view according to individual preferences. Personal list customizations do not affect what other users see in their lists.

1. Open the list
2. Click the personalize list icon in the upper left corner
   • The Personalize List Columns window opens
3. Use the slushbucket to select the columns and the desired order
   • Values in the first column appears as links. If the first column is not a reference field, the link opens the record from the list, as expected. If the first column is a reference field, the link opens the record from the referenced table. This behavior can be confusing. For this reason, avoid using a reference field as the first column.
4. Select display options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display long text on more than one line</td>
<td>Select the <strong>Wrap column text</strong> check box. Clear the check box to display text on one line</td>
</tr>
<tr>
<td>Condense the vertical space between rows</td>
<td>Select the <strong>Compact rows</strong> check box. Clear the check box to use standard row spacing</td>
</tr>
</tbody>
</table>
### Personal Lists (cont.)

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highlight list rows as the cursor passes over them</td>
<td>Select the <strong>Active row highlighting</strong> check box. Clear the check box to restore the static, alternate row highlighting.</td>
</tr>
<tr>
<td>Use updated field status indicators</td>
<td>Select <strong>Modern cell coloring</strong> check box.</td>
</tr>
</tbody>
</table>

5. Select list editing options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow the list editor to open for the list</td>
<td>Select the <strong>Enable list edit</strong> check box. Clear the check box to prevent the list editor from opening the list.</td>
</tr>
<tr>
<td>Open the list editor with a double-click</td>
<td>Select the <strong>Double click to edit</strong> check box. Clear the check box to open the list editor using a single click.</td>
</tr>
</tbody>
</table>

6. Click **OK**
   - The list reloads to show the changes. If you personalized the columns, an indicator appears on the personalize list icon.
   - To reset a list to the default layout, click the personalize list icon and click the **Reset to column defaults** button.
Using Forms in ServiceLink
Forms (Requests)

A form displays information from one record in a data table. The specific information depends on the type of record displayed. Users can view and edit records in forms. Below is an example of a Request Form:

- **Form Header**
- **Fields**
- **Related Lists/Embedded List**
Forms (Items)

Form Header

Fields

Related Lists/Embedded List
# Forms (Tasks)

<table>
<thead>
<tr>
<th>Number</th>
<th>SCTASK0013921</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment group</td>
<td>NOSC Onboarding Shared Services Fulfiller</td>
</tr>
<tr>
<td>Assigned to</td>
<td>Guadalupe Quintana</td>
</tr>
<tr>
<td>Configuration Item</td>
<td></td>
</tr>
<tr>
<td>Active</td>
<td>Yes</td>
</tr>
</tbody>
</table>

- **Approval**: Not Yet Requested
- **State**: Pending
- **Request Item**: RTM00115312
- **Requested for**: Monica Miller

**Short description**: Complete UCPATH Template-based Hire

**Description**: Khuyen Nguyen - New Hire - Pending: Position confirmation

**Work notes**: Guadalupe Quintana is viewing

**Activity**:
- Guadalupe Quintana
- State: Pending was Open
# Form Elements

<table>
<thead>
<tr>
<th>Form Element</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Form Header</strong></td>
<td>Provides navigation tools and actions related to the record</td>
</tr>
<tr>
<td><strong>Fields</strong></td>
<td>Stores specific data about the record. Can appear and be sorted on a List.</td>
</tr>
<tr>
<td><strong>Sections</strong></td>
<td>Groups related information on the form. To enable or disable form tabs, click the gear icon in the Banner Frame and toggle to <strong>Tabbed Forms</strong> option.</td>
</tr>
<tr>
<td></td>
<td>Users can use icons to collapse or expand form sections when tabbed forms are disabled. When you collapse or expand a form section, your selection is saved as a user preference. The next time you access a record that uses the same form, the same sections are collapsed or expanded.</td>
</tr>
<tr>
<td><strong>Related Links</strong></td>
<td>Provides access to additional functions based on record type and system setup.</td>
</tr>
<tr>
<td><strong>Related Lists</strong></td>
<td>Displays records in other tables that have relationships to the current record.</td>
</tr>
<tr>
<td><strong>Embedded Lists</strong></td>
<td>Allows for editing related lists without having to navigate away from the form. Changes are saved when the form is saved.</td>
</tr>
<tr>
<td><strong>Response Time indicator</strong></td>
<td>Appears at the bottom of some forms to indicate the processing time required to display the form.</td>
</tr>
</tbody>
</table>
Form Headers

The Form Header provides navigation tools and actions related to a record. Navigation tools and actions in the Form Header are dependent on the form type used. The Form Header illustrated below represents a generic Form Header and standard Navigation Tools and Actions:
## Form Header Controls

<table>
<thead>
<tr>
<th>Control</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back</td>
<td>⬅️</td>
<td>Navigates to the previously viewed page without saving changes</td>
</tr>
<tr>
<td>Form context menu</td>
<td>☑️</td>
<td>Appears when a user clicks the menu icon beside the form title or right-clicks the form header. This menu is also called the right-click menu</td>
</tr>
<tr>
<td>Attachments</td>
<td>📝</td>
<td>Allows users to view and add attachments to the record</td>
</tr>
<tr>
<td>Show activity stream</td>
<td>⌚️</td>
<td>Moves focus to the journal entry section of the form</td>
</tr>
<tr>
<td>Personalize form</td>
<td>⬅️</td>
<td>Opens the form personalization menu</td>
</tr>
<tr>
<td>More options</td>
<td>⚙️</td>
<td>Opens additional options, which include, Toggle Template Bar and Add Tag</td>
</tr>
<tr>
<td>Toggle template bar</td>
<td>&quot;&quot;</td>
<td>Opens a bar at the bottom of the form and lists available templates</td>
</tr>
<tr>
<td>Add tag</td>
<td>💰</td>
<td>Displays the option to create custom tags and categorize documents</td>
</tr>
</tbody>
</table>
Form Header Controls (cont.)

<table>
<thead>
<tr>
<th>Control</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Follow</td>
<td>Follow</td>
<td>Allows the user to follow a record in Connect. Users are notified of any new comments or work notes according to their notification settings (see screenshots below)</td>
</tr>
<tr>
<td>Update</td>
<td>Update</td>
<td>Saves record and redirects to previous screen</td>
</tr>
<tr>
<td>Save</td>
<td>Save</td>
<td>Saves record and remain on the record</td>
</tr>
<tr>
<td>Previous and Next</td>
<td>↑↓</td>
<td>Opens the previous and next record on the list for which the record was accessed</td>
</tr>
</tbody>
</table>

Followed records appear in Connect as conversations and are searchable.

Clicking on a followed record in Connect opens the Activity Stream for that record, including the ability to add worknotes and work collaboratively.
Understanding the Fulfiller View
# Fulfiller View (List)

## Open Items Assigned to My Group (open tasks assigned to my group)

<table>
<thead>
<tr>
<th>Number</th>
<th>Parent ▲</th>
<th>State</th>
<th>Short description</th>
<th>Assigned to</th>
<th>Assignment group</th>
<th>Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>INC00100016</td>
<td>Resolved</td>
<td>Missed cut off to submit timesheet</td>
<td>Sonya Potter</td>
<td>UCPath Hypercare Tier 1</td>
<td>21h ago</td>
<td></td>
</tr>
<tr>
<td>INC00100104</td>
<td>In Progress</td>
<td>submit button not working</td>
<td></td>
<td>UCPath Hypercare Tier 1</td>
<td>13d ago</td>
<td></td>
</tr>
</tbody>
</table>

## My Work (open tasks assigned to me)

No records to display

## Open Items Assigned to My Group (closed tasks assigned to my group)

<table>
<thead>
<tr>
<th>Number</th>
<th>Parent ▲</th>
<th>State</th>
<th>Short description</th>
<th>Assigned to</th>
<th>Assignment group</th>
<th>Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>INC00177134</td>
<td>Closed</td>
<td>Silvegate Aces Reyes needs home department changed on time sheet.</td>
<td>Sonya Potter</td>
<td>UCPath Hypercare Tier 1</td>
<td>18d ago</td>
<td></td>
</tr>
<tr>
<td>INC00183931</td>
<td>Closed</td>
<td>Unable to term &quot;Contingent Workers&quot; from the system due to them not having a position number. We have several that should be termed effective 12/31/17.</td>
<td>Kathleen Cook</td>
<td>UCPath Hypercare Tier 1</td>
<td>12d ago</td>
<td></td>
</tr>
</tbody>
</table>
ServiceLink Ticket Life Cycle

- ServiceLink Initiator submits a request via a ServiceLink form.
- ServiceLink confirms that the request has been submitted and provides the Initiator with a Request Number (i.e. REQ0010835).
- The Request is then assigned a RITM number (Request Item). The RITM acts like a shopping cart where one or more tasks, depending on the request, can be added. These tasks then become the “children” to the RITM “parent”.
- Tasks (SCTASK) can be generated after certain tasks are closed (FAU Approver) or all at once (Onboarding). Tasks can be assigned at the Accountability Structure level or to a Shared Services Center.
- Once all Tasks with a RITM “Shopping Cart” have been closed, the Request Item is closed and marked as complete.
Request/RITM/Task Relationship

Requested Items under the Request Form

- **Associated RITM link**
- **Stage of RITM** – will automatically be marked “complete” once all associated tasks are closed

Catalog Tasks under the RITM Form

- **Associated Task link**. If more than one task is associated with this request, several lines of tasks would appear here
- **Stage of a single Task**. Once all tasks associated with a request are closed, the RITM is marked as “complete”
Requests

Request Number (i.e., REQ0010835) – request will be assigned a RITM number in the Fulfiller view, along with tasks, as needed

Hyperlink to Request information, requested items, and status

Gives an at-a-glance status of the Request. In this example, the request was created and is in fulfillment
Requests (Support)

- Provides hyperlink to request data and RITM Number
- Provides a status of the request
- Estimated completion and other information pertaining to the request
- View of attachments

Add notes/attachments to the request by typing them in the text box and clicking **Send**

Notes and attachments are displayed on a timeline
How to Search for Requests

1. To search for a Request (without a Request Number), type “Request” or “Requests” in the Filter Navigator.

2. The Filter Navigator will filter all “Request” instances. Scroll to the bottom of the Application Navigator and select “Requests” under the Service Catalog Application.

3. All Requests in list form will populate in the Content Frame. Search and filter to reach the desired record.
How to Search for a RITM

1. To search for a RITM (without a RITM), type “Item” or “Items” in the Filter Navigator.

2. The Filter Navigator will filter all “Item” instances. Scroll to the bottom of the Application Navigator and select “Items” under the Service Catalog Application.

3. All RITMs in list form will populate in the Content Frame. Search and Filter to reach the desired record.
RITM Do’s and Don’t’s

RITMs or “Requested Items” act similarly to a shopping cart, in that they can contain one or many sub-tasks that need to be “closed” before the RITM can be completed/fulfilled. RITMs are “parents” to the “child” tasks. RITMs contain all data that is part of the request and displays associated tasks in a section located at the bottom of every RITM record. Keeping this information in mind:

DO’s

- Do refer back to the RITM for every request when identifying/tracking pending or completed tasks. All associated tasks are listed at the bottom of every RITM record with stage (progress information).
- Do follow problematic RITM records. Following a record allows you to track it in the Connect Chat app and allows you to enter work notes and collaborate on the ticket with your co-workers without having to search or filter for the ticket.
- Do enter Work notes and Additional comments on an RITM record as it applies to the Requested Items.

DON’T’s

- Don’t assign an RITM to yourself. If you do, it will remain in your My Work queue until all associated tasks are closed.
- Don’t enter Work notes or Additional comments when referring to an associated task, such as FAU approval. These comments should be entered in the Work notes and/or Description for the associated task.
Tracking Tickets

Given that a RITM as a parent/child relationship with tasks, related tasks for a given RITM are always displayed in a section at the bottom of every RITM record.

The Stage of every RITM is displayed in List and is a searchable/filterable field.
Creating Notes in Request Items

Work notes are meant for internal use only. Users added on the “Work List” will be notified via email of all Work Notes added.

Additional comments are always customer visible. Users added to the “Watch List” will be notified via email of all Additional Comments added.

Follow a RITM to keep track of its progress and collaboratively add work notes with colleagues via the Connect feature.
Watch List and Work List

Add users to the Watch List and Work List to keep them informed as to the progress of individual tasks. To add users to either list, add their email address or type in their names. The system should be able to auto-populate the rest of their info.

Users added to the “Work List” will be notified via email when Work Notes are added. The email will include a link to the item or task where the notes were added.

Users added to the “Watch List” will be notified via email when Additional Comments are added. The email will include a link to the item or task where the comments were added.
Attached Documents

Attachments are located at the RITM level and can be managed.

To view an attachment, click on the [view] tag located after the attachment name – this will prompt the file to download.

To rename an attachment, click on the [rename] tag located after the attachment name – this will prompt you to rename the file directly on the attachment.
Why Tasks Matter
How to Search for a Task

1. To search for a Task (without a Task number), type “task” or “tasks” in the Filter Navigator.

2. The Filter Navigator will filter all “Task” instances. Scroll to the bottom of the Application Navigator and select “Tasks” under the Service Catalog Application.

3. All tasks in list form will populate in the Content Frame. Search and Filter to reach the desired record.
Task Do’s and Don’t’s

Tasks (or tickets that start with SCTASK) are sub-task for a given requested item. At the bottom of every RITM record is a list of all associated tasks and their stage (progress). In some instances, tasks need to be closed before another task can be sent on to the SSC to enter in UCPath. Examples include New Position (FAU Approval) and Extended Leave (Send/Receive Leave Paperwork).

Keeping this information in mind:

**DO’s**

- Do assign a task to yourself
- Do periodically search for tasks with Assignment Groups that start with client Departments and Organizations. That way you can proactively track tasks that are “stuck” or coming down the pipeline.
- Do close tasks (click the “Close Task”) button when completed.
- Do write notes in the Description. Remember that the Description section is considered a field. That means that it is searchable and filterable!!
- Do follow tasks assigned to. Following a task allows you to track it in the Connect Chat app and allows you to enter work notes and collaborate on the ticket with your co-workers without having to search or filter for the ticket.
- Do remember that an FAU Approve cannot deny an FAU. If the incorrect FAU is listed, please do enter the correct FAU in the Description, click the Save button and close the task.
- Do enter the New Position Number on the “Create a new position” task.

**DON’T’s**

- Don’t assign a task to an SSC/SSC employee once closed. The follow-up task will be routed to their SSC queue automatically. Assigning a task to an SSC or an SSC employee can cause the follow-up task to get “stuck” or lost.
- Don’t use the “Closed Incomplete” state if your intent is to stop a follow-up to go the SSC. It will still appear in their queue!
Creating Notes in Tasks

Short description is considered a “Field” and is searchable/filterable.

Work notes are meant for internal use only. Because of current settings, they may be seen by both SSC and department fulfillers. To post a work note, click the “Post” button.

In tasks, client-facing notes such as FAU confirmation, should be made in “Description.” To save a note made in “Description,” click the “Save” button in the Form Header.
Closing Tasks

To close a Task, either click on the “Close Task” button in the form header OR select “Closed Complete” from the State dropdown.

If something is wrong on the ticket and you are not yet ready to close it, do not set the State as “Closed Incomplete” or “Closed Skipped.” If the task in question has a follow-up task assigned to a SSC it will still be sent out when selecting ANY “Closed” State.

When “approving” and FAU, enter your approval in the “Description” box and hit the “Save” button.
Position Data Management Tasks

Review FAU Information

Review FAU Information task is automatically assigned to Assignment Group ORG_Position Management FAU Approver and is routed to the Departmental staff with the EACS role FAU Reviewer. The Review FAU Information task appears in the bottom section of a RITM for a New Position:

The FAU Reviewer will NOT receive an email notification to let them know that they need to review a task in their queue. The task will appear under the My Work Module in ServiceLink AND in their Fulfiller View, under My Work.

The FAU Reviewer should ensure that the FAU noted in the Comments section of the Task is correct.

- If it is correct, the FAU Approver should write “Approved” in the Description field, click the Save button, followed by the Close Task button.
- If the FAU is NOT correct, the FAU Reviewer should enter the correct FAU in the Description field, click the Save button, followed by the Close Task button.
- Once the Review FAU Information Task is closed by the FAU Reviewer, the SSC will receive a new task assigned to the SSC Position Management Shared Services Fulfiller with a short description of “Create a new position.”
Onboarding Tasks

When an Onboarding Request is submitted by the ServiceLink Onboarding Initiator, tasks are created for BOTH the Accountability Structure Fulfiller and the SSC Fulfiller to complete and close. While Onboarding tasks are not dependent on the Accountability Structure to close to push to SSC, some tasks need to be closed in order to trigger additional tasks.

When a request is first initiated, tasks are assigned to both the Accountability Structure and the SSC.
Onboarding Tasks (cont.)

Once the initially received tasks are closed (both at the Accountability Structure and SSC levels), additional tasks are generated:
Onboarding Tasks (cont.)

Upon closing, additional tasks (for both Accountability Structure and SSC Fulfillers are generated:

<table>
<thead>
<tr>
<th>Task Number</th>
<th>Short Description</th>
<th>Assignment Group</th>
<th>Assigned To</th>
<th>Stage</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>S012345</td>
<td>Update Enterprise Directory</td>
<td>ORG12 Onboarding Accountability Structure</td>
<td></td>
<td></td>
<td>Open</td>
</tr>
<tr>
<td>S012346</td>
<td>Verify Documents and File Paperwork</td>
<td>Harvest Onboarding Shared Services Fulfiller</td>
<td></td>
<td></td>
<td>Open</td>
</tr>
<tr>
<td>S012347</td>
<td>Complete UCPath Template Based Hire</td>
<td>Harvest Onboarding Shared Services Fulfiller</td>
<td></td>
<td></td>
<td>Closed Complete</td>
</tr>
<tr>
<td>S012348</td>
<td>Conduct Day 1 In-person Session</td>
<td>Harvest Onboarding Shared Services Fulfiller</td>
<td></td>
<td></td>
<td>Closed Complete</td>
</tr>
<tr>
<td>S012349</td>
<td>Complete Onboarding Packet</td>
<td>Harvest Onboarding Shared Services Fulfiller</td>
<td></td>
<td></td>
<td>Closed Complete</td>
</tr>
<tr>
<td>S012350</td>
<td>Schedule Day 1 In-Person Session</td>
<td>Harvest Onboarding Shared Services Fulfiller</td>
<td></td>
<td></td>
<td>Closed Complete</td>
</tr>
<tr>
<td>S012351</td>
<td>Send NetID to Employee</td>
<td>ORG12 Onboarding Accountability Structure</td>
<td></td>
<td></td>
<td>Closed Complete</td>
</tr>
<tr>
<td>S012352</td>
<td>Confirm FAU is Correct</td>
<td>ORG12 Onboarding Accountability Structure</td>
<td></td>
<td></td>
<td>Closed Complete</td>
</tr>
<tr>
<td>S012353</td>
<td>Create or Reactivate NetID</td>
<td>ORG12 Onboarding Accountability Structure</td>
<td></td>
<td></td>
<td>Closed Complete</td>
</tr>
</tbody>
</table>
Onboarding Tasks (cont.)

Upon closing, final (for both Accountability Structure and SSC Fulfillers are generated:

<table>
<thead>
<tr>
<th>Number</th>
<th>Short description</th>
<th>Assignment group</th>
<th>Assigned to</th>
<th>Stage</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SCTASK014510 - Monitor Completion of Background Check</td>
<td>Harvest Onboarding Shared Services Fulfiller</td>
<td></td>
<td>✔</td>
<td>Open</td>
</tr>
<tr>
<td>2</td>
<td>SCTASK014509 - Update Required UCPath Checklist Items (Oath and Patent/Patent Waiver)</td>
<td>Harvest Onboarding Shared Services Fulfiller</td>
<td></td>
<td>✔</td>
<td>Open</td>
</tr>
<tr>
<td>3</td>
<td>SCTASK014503 - Schedule Day 1 In-Person Session</td>
<td>D01036 Onboarding Accountability Structure</td>
<td></td>
<td>✔</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>4</td>
<td>SCTASK014508 - Verify Documents and File Paperwork</td>
<td>Harvest Onboarding Shared Services Fulfiller</td>
<td></td>
<td>✔</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>5</td>
<td>SCTASK014501 - Create or Reactivate NetID</td>
<td>D01036 Onboarding Accountability Structure</td>
<td></td>
<td>✔</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>6</td>
<td>SCTASK014504 - Confirm FAU is Correct</td>
<td>D01036 Onboarding Accountability Structure</td>
<td></td>
<td>✔</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>7</td>
<td>SCTASK014502 - Complete UCPath Template Based Hire</td>
<td>Harvest Onboarding Shared Services Fulfiller</td>
<td></td>
<td>✔</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>8</td>
<td>SCTASK014505 - Conduct Day 1 In-Person Session</td>
<td>Harvest Onboarding Shared Services Fulfiller</td>
<td></td>
<td>✔</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>9</td>
<td>SCTASK014507 - Update Enterprise Directory</td>
<td>D01036 Onboarding Accountability Structure</td>
<td></td>
<td>✔</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>10</td>
<td>SCTASK014506 - Send NetID to Employee</td>
<td>D01036 Onboarding Accountability Structure</td>
<td></td>
<td>✔</td>
<td>Closed Complete</td>
</tr>
<tr>
<td>11</td>
<td>SCTASK014500 - Complete Onboarding Packet</td>
<td>Harvest Onboarding Shared Services Fulfiller</td>
<td></td>
<td>✔</td>
<td>Closed Complete</td>
</tr>
</tbody>
</table>
Onboarding Tasks – with Visa

When Onboarding an employee on a Visa, the Department Initiator should check the Visa box. Once the SSC Fulfiler completes and closes the "verify documents" task, Glacier will be notified. Remember that the task MUST be closed for the notification to be sent to Glacier.

<table>
<thead>
<tr>
<th>Request item</th>
<th>Short description</th>
<th>Assignment group</th>
<th>Assigned to</th>
<th>Stage</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCTASK0014510</td>
<td>Monitor Completion of Background Check</td>
<td>Harvest Onboarding Shared Services Fulf....</td>
<td></td>
<td></td>
<td>Open</td>
</tr>
<tr>
<td>SCTASK0014509</td>
<td>Update Required UCPath Checklist Items (Oath and Patent/Patent Waiver)</td>
<td>Harvest Onboarding Shared Services Fulf....</td>
<td></td>
<td></td>
<td>Open</td>
</tr>
<tr>
<td>SCTASK0014503</td>
<td>Schedule Day 1 In-Person Session</td>
<td>D01036 Onboarding Accountability Structure</td>
<td></td>
<td></td>
<td>Closed Complete</td>
</tr>
<tr>
<td>SCTASK0014508</td>
<td>Verify Documents and File Paperwork</td>
<td>Harvest Onboarding Shared Services Fulf....</td>
<td></td>
<td></td>
<td>Closed Complete</td>
</tr>
<tr>
<td>SCTASK0014501</td>
<td>Create or Reactivate NetID</td>
<td>D01036 Onboarding Accountability Structure</td>
<td></td>
<td></td>
<td>Closed Complete</td>
</tr>
<tr>
<td>SCTASK0014504</td>
<td>Confirm FAU is Correct</td>
<td>D01036 Onboarding Accountability Structure</td>
<td></td>
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<tr>
<td>SCTASK0014502</td>
<td>Complete UCPath Template Based Hire</td>
<td>Harvest Onboarding Shared Services Fulf....</td>
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<tr>
<td>SCTASK0014506</td>
<td>Conduct Day 1 In-person Session</td>
<td>Harvest Onboarding Shared Services Fulf....</td>
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<tr>
<td>SCTASK0014507</td>
<td>Update Enterprise Directory</td>
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<tr>
<td>SCTASK0014505</td>
<td>Send NetID to Employee</td>
<td>D01036 Onboarding Accountability Structure</td>
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<tr>
<td>SCTASK0014500</td>
<td>Complete Onboarding Packet</td>
<td>Harvest Onboarding Shared Services Fulf....</td>
<td></td>
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<td>Closed Complete</td>
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</table>
Extended Leave Tasks

Extended Leave Tasks behave similarly as do tasks associated with a New Position. When requesting an Extended Leave, the system will send a task to the Extended Leave Accountability Fulfiller to Send/Receive the leave packet. This task MUST be closed before another task can be created by the system and sent to the Shared Services Center for transaction.

The Send/Receive Leave Packet task is assigned to the Assignment Group ORG_Extended Leave Accountability Structure Fulfiller:

Once the Send/Receive Leave Packet task has been closed by the Extended Leave Accountability Structure Fulfiller, another task is generated to enter the leave in UCPath and is assigned automatically to the Assignment Group SSC_Extended Leave Shared Services Fulfiller.
Offboarding Tasks

When an Offboarding Request is submitted by the ServiceLink Offboarding Initiator, tasks are created for BOTH the Accountability Structure Fulfiller and the SSC Fulfiller to complete and close. While Offboarding tasks are not dependent on the Accountability Structure to close to push to SSC, some tasks need to be closed in order to trigger additional tasks.

When a request is first initiated, tasks are assigned to both the Accountability Structure and the SSC
Offboarding Tasks (cont.)

Once the initial tasks assigned to both the Accountability Structure Fulfiller and the SSC Fulfiller are completed and closed, additional tasks are triggered:

<table>
<thead>
<tr>
<th>Number</th>
<th>Short description</th>
<th>Assignment group</th>
<th>Assigned to</th>
<th>Stage</th>
<th>State</th>
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<tbody>
<tr>
<td>SCTASK0014516</td>
<td>Update Enterprise Directory</td>
<td>D01037: Offboarding Accountability Structure</td>
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<td>SCTASK0014515</td>
<td>Send Exit Interview Link and Cover Letter</td>
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<td>SCTASK0014514</td>
<td>Complete UCPath Final Pay Request in UCPath (only applicable if sep. from UC)</td>
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<td>SCTASK0014511</td>
<td>Complete UCPath Termination Template</td>
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<td>Closed Complete</td>
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<td>SCTASK0014512</td>
<td>Identify Employee's final Timesheet in TARS and mark as 'Do not submit to UCPath'</td>
<td>Harvest Offboarding Shared Services Fulfiller</td>
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<td>SCTASK0014513</td>
<td>Confirm Employee's final timesheet has been submitted and Approved by the supervisor</td>
<td>D01037: Offboarding Accountability Structure</td>
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</table>
Additional Courses

• UCRSL100: Intro to ServiceLink
• UCRSL110: ServiceLink Navigation for Initiators
• UCRPDM200: Advanced FOM ServiceLink Position Data Management
• UCRONB200: Advanced FOM ServiceLink Onboarding
Training Resources

http://fomucpath.ucr.edu/training/resources.html
Your Feedback Please

https://tinyurl.com/ucrfomucpathfeedback
Thank You