UNIVERSITY OF CALIFORNIA
UC RIVERSIDE

FOM|UCPath Training

ServiceLink Navigation for Fulfillers

Trainer Introduction

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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

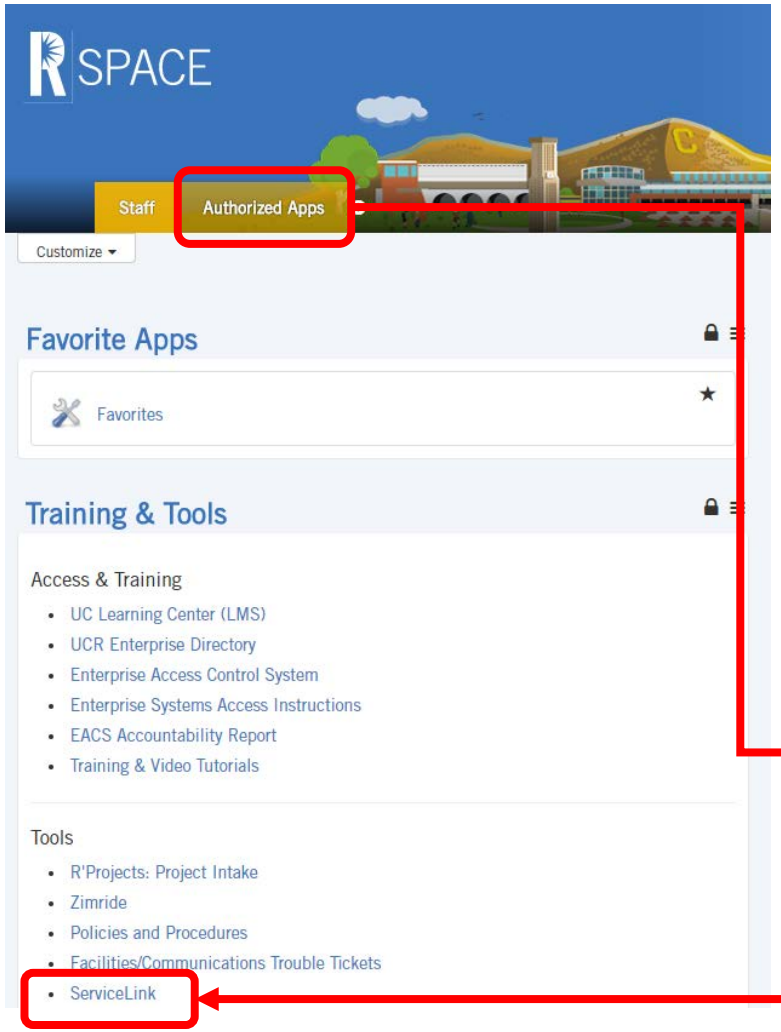
Restrooms

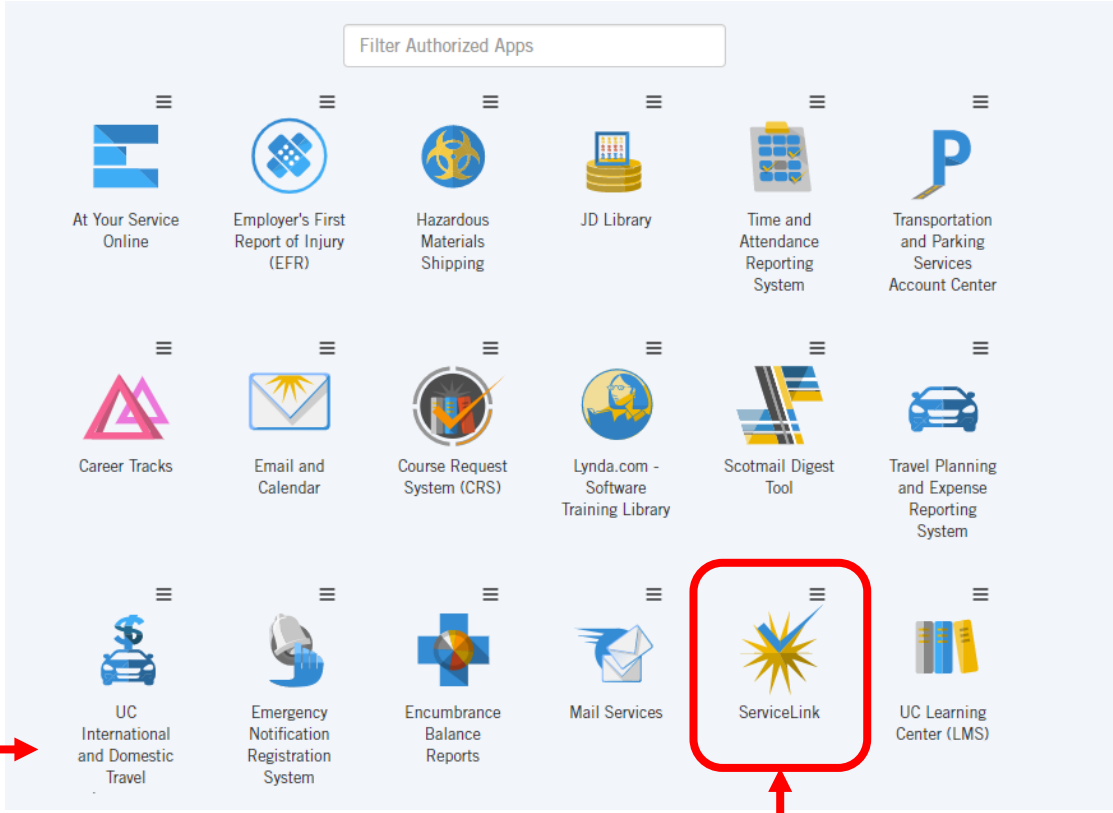
Learning Topics

- 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

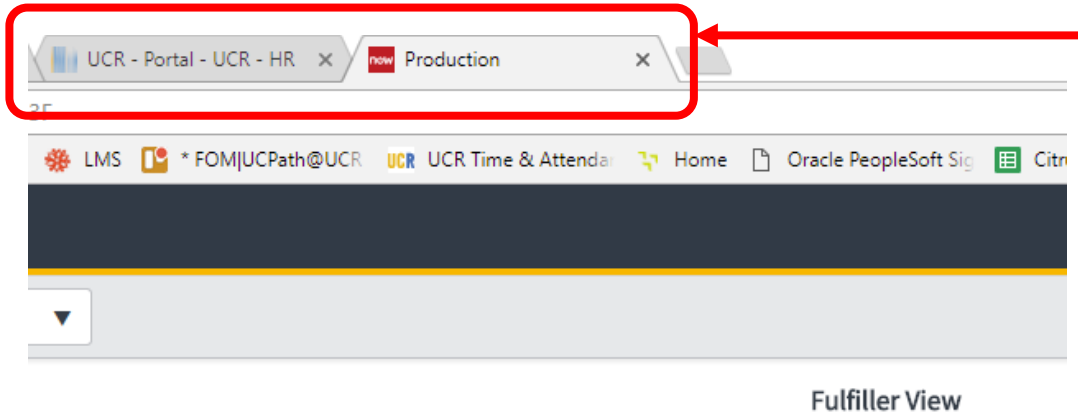




The ServiceLink Portal can be accessed via R’Space under Tools as well as under Authorized Apps

ServiceLink Portal

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.



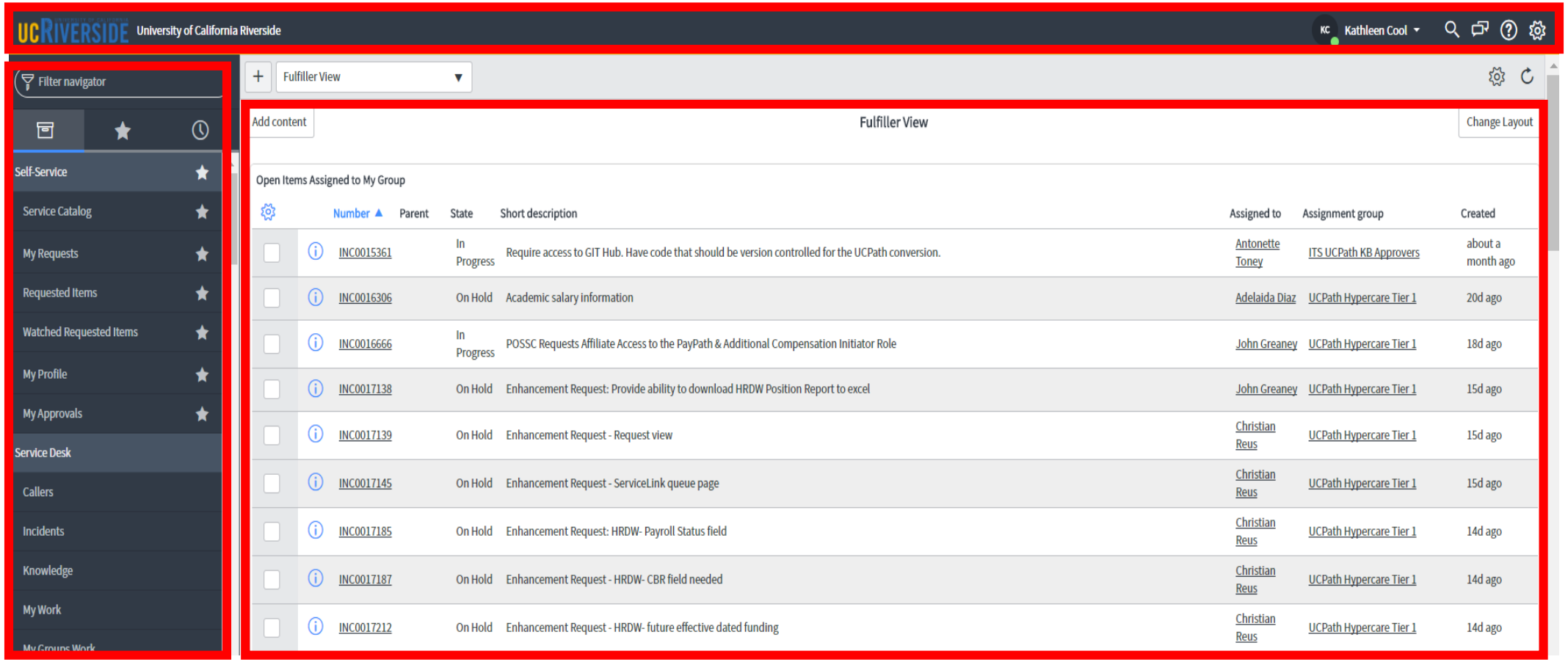
To access both the ServiceLink Portal and Fulfiller View simultaneously, you will have to have two browser tabs open – One with the ServiceLink Portal (URL - https://ucrsupport.service-now.com/ucr_portal/) and the other with the SeviceLink Fulfiller View (URL - https://ucrsupport.service-now.com)

ServiceLink Navigation

1.

2.

3.



1. Banner Frame
2. Application navigator
3. Content Frame

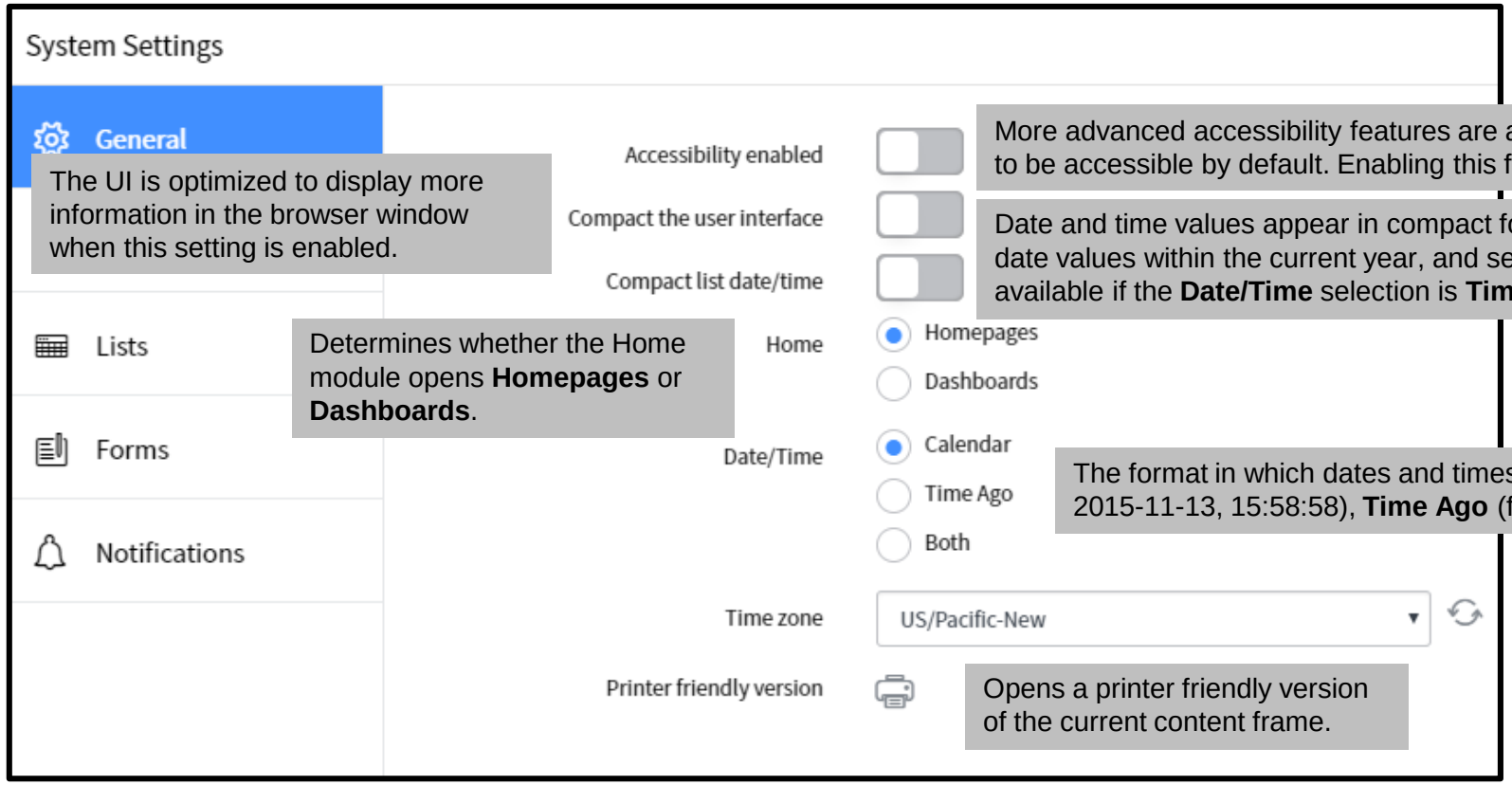
Navigating the Banner Frame

Banner Frame

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

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:



The UI is optimized to display more information in the browser window when this setting is 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.

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**.

Determines whether the Home module opens **Homepages** or **Dashboards**.

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**.

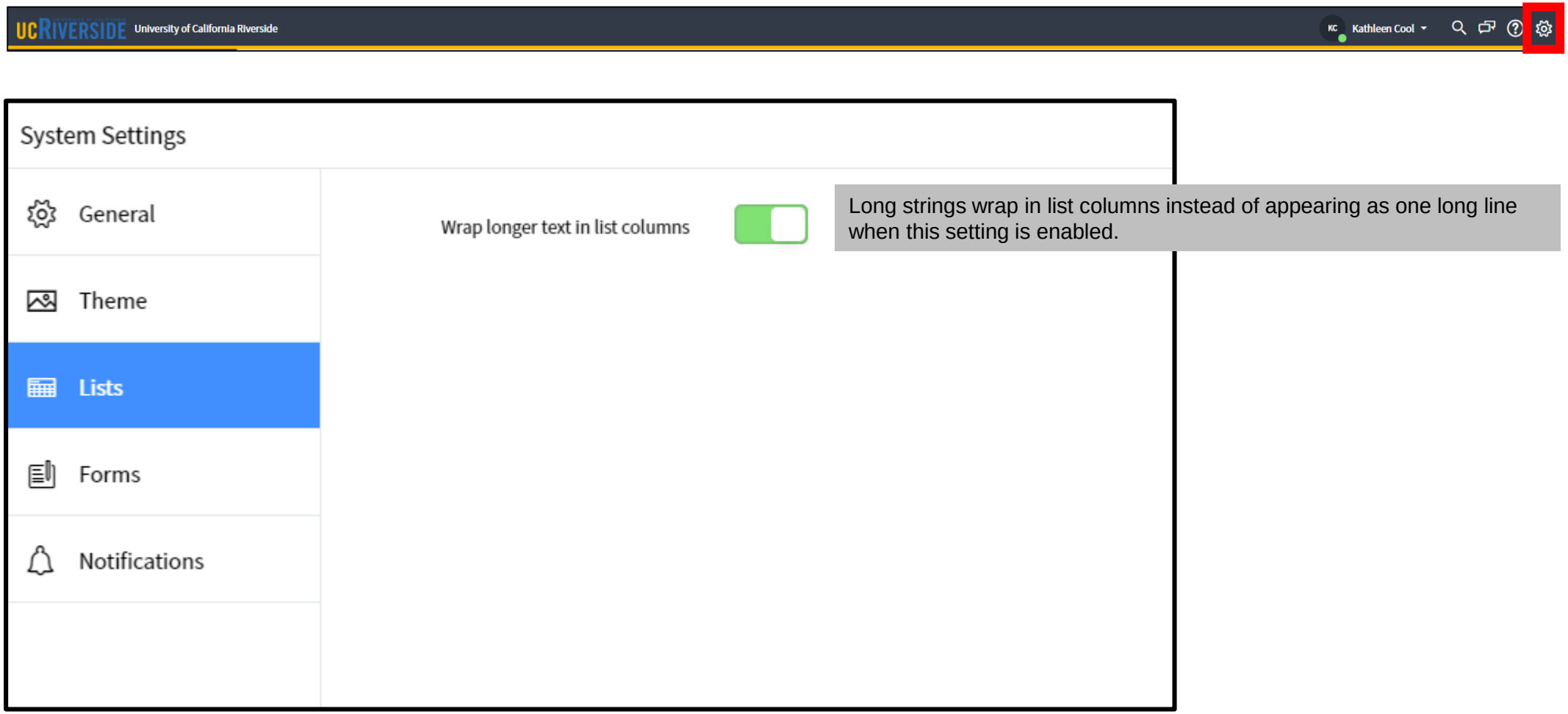
Select a time zone or return to the default time zone.

Opens a printer friendly version of the current content frame.

System settings for the UI (cont.)

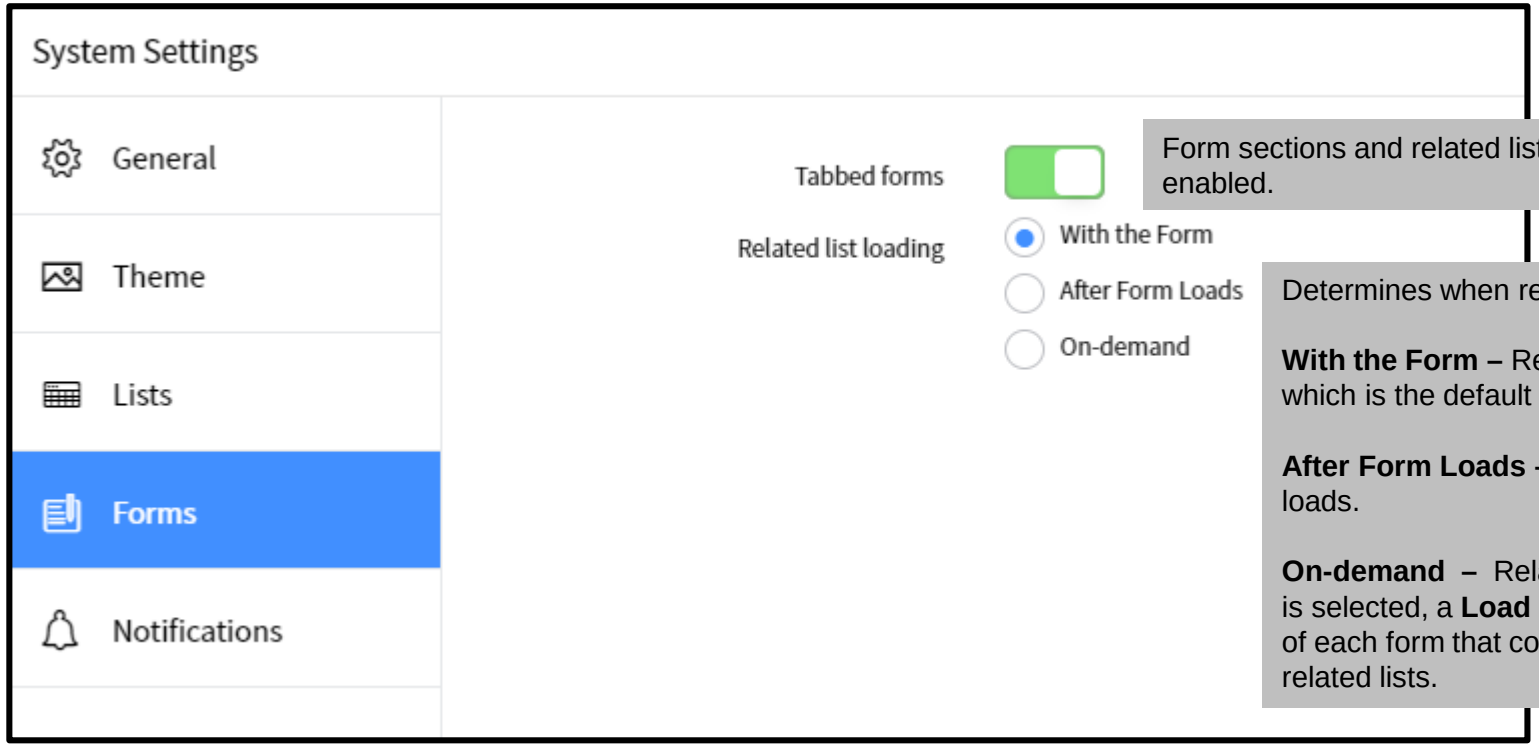
Select a theme for the user interface. Select the System theme to return to the default theme.

System settings for the UI (cont.)



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.

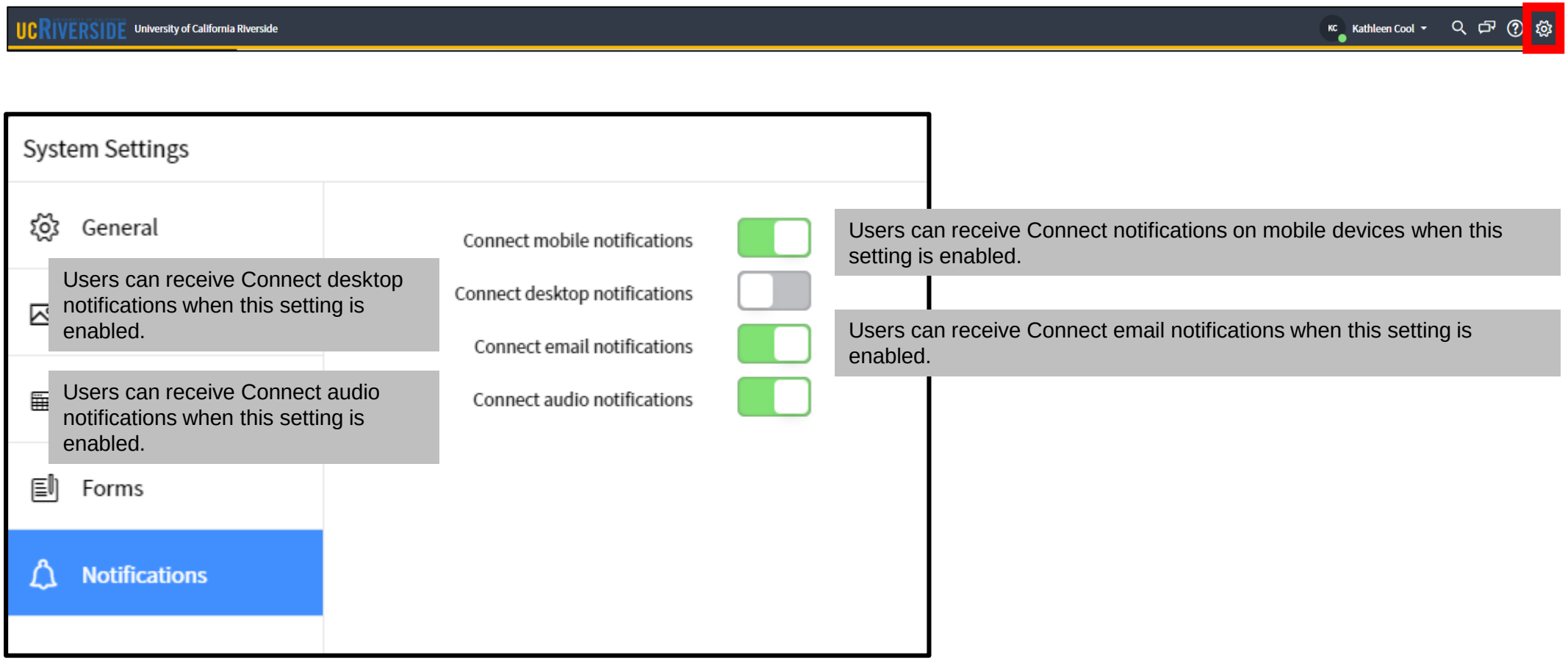
Determines when related lists load on forms:

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.

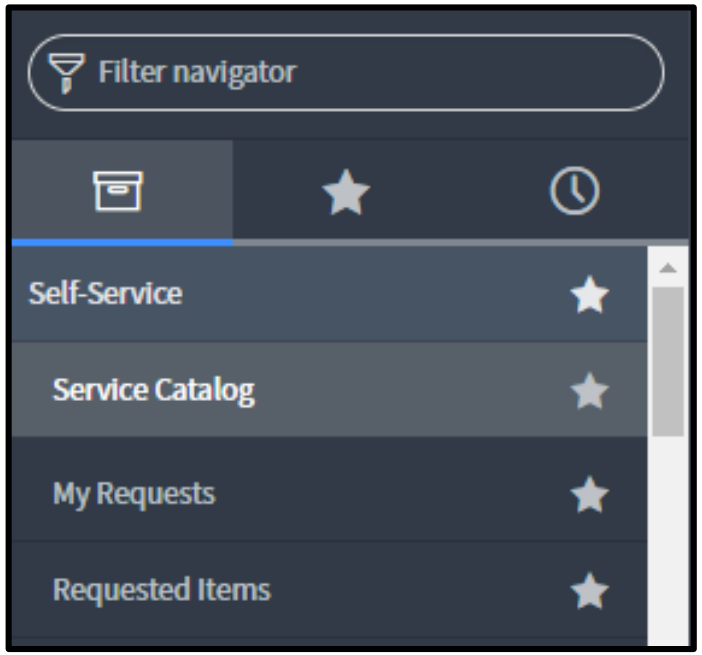
System settings for the UI (cont.)



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:



Tab Name	Tab Icon	Description
All Applications		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.
Favorites		Displays items you have added as favorites.
History		Displays items you have recently accessed.

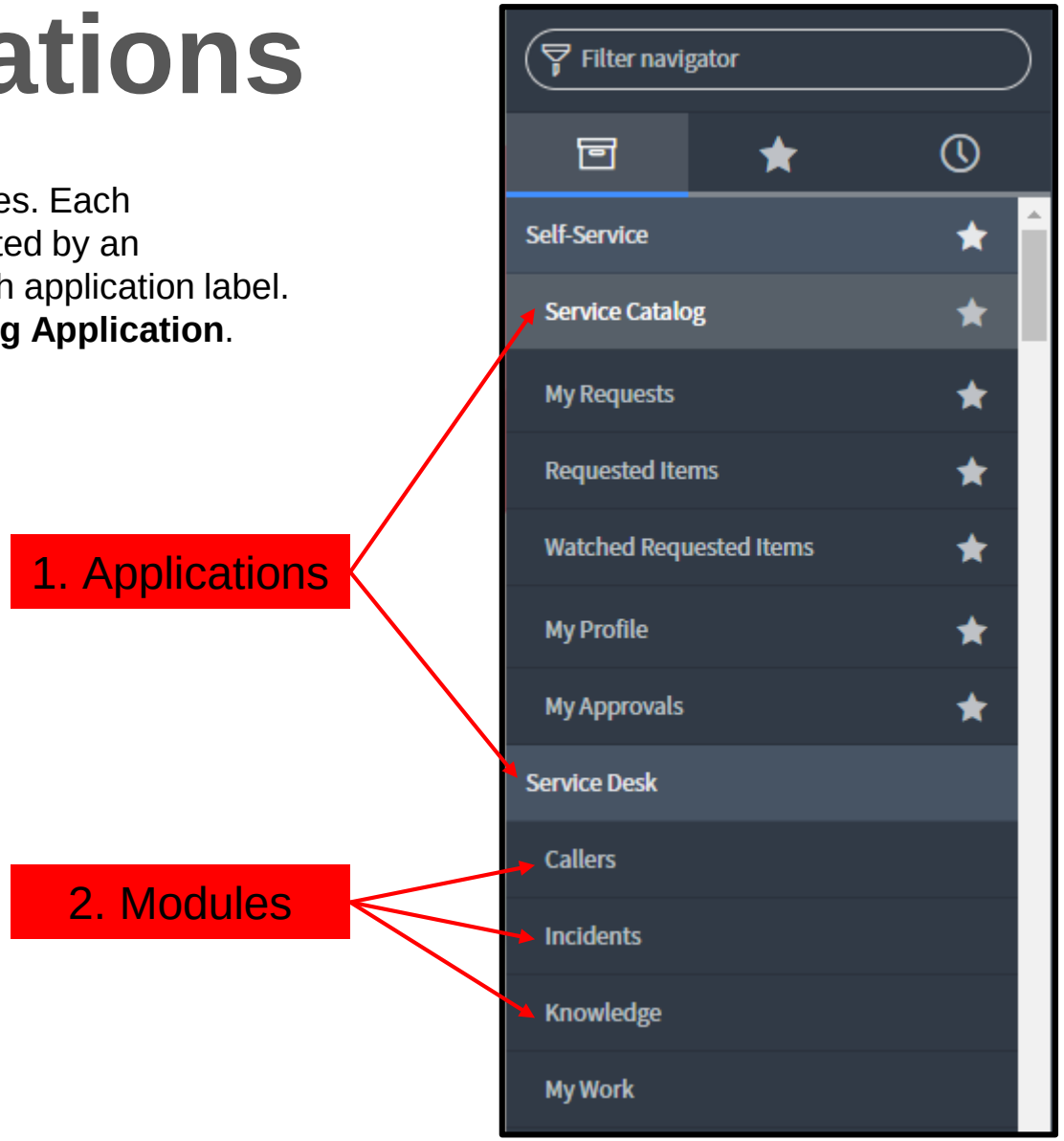
Enter text in the navigation filter to show matching applications, modules, and favorites. Matching favorites appear at the top of the results. You can also use the navigation filter to quickly access a specific table.

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.

Option	Description
Collapse or expand an application or application section	Click the application or application section label.
Collapse or expand all applications	Double-click the all applications tab icon 
Collapse or expand the application navigator	Click the arrow icon at the bottom of the application navigator. In the collapsed view, the application navigator displays favorites only. Click the filter icon or the arrow icon in the collapsed view to expand the application navigator.

Collapsed navigator

Using the Application Navigator (cont.)

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.

Option	Description
Add a module as a favorite	In the application navigator, click on the star icon by a module.
Add all the modules under an application as favorites	In the application navigator, click the star icon by an application
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:

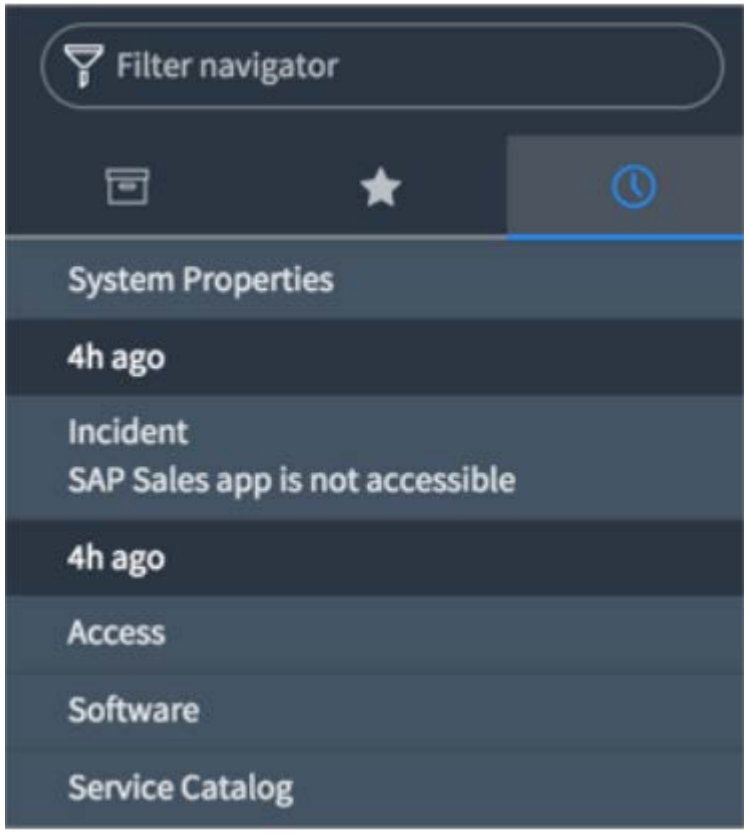
Option	Description
Reorder favorites in the list	1. At the bottom of the application navigator, click **Edit Favorites** 2. Drag a favorite to a new location in the list 3. Click **Done** or **Edit Favorite**
Customize the name or icon for a favorite	1. At the bottom of the application navigator, click **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 

Using the Application Navigator (cont.)

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.

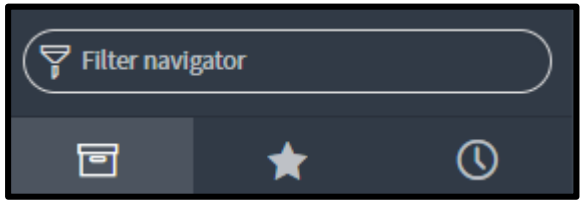
1. In the application navigator, click the history tab, which is represented by a clock.
2. Click an item to open it.

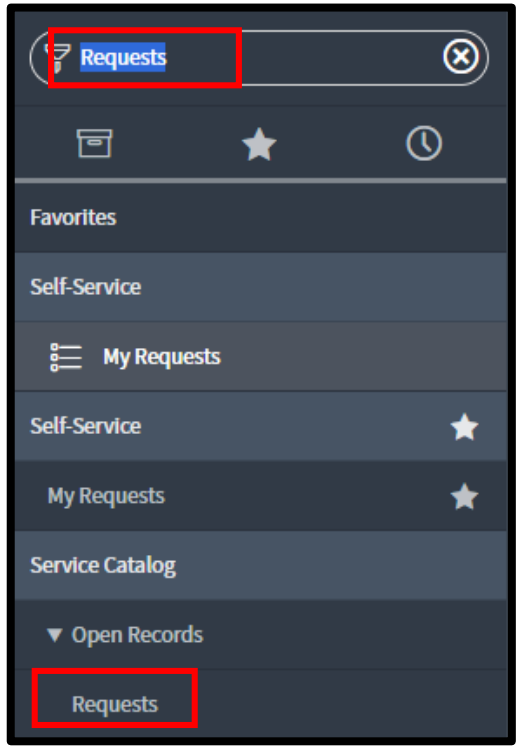


History Tab

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:

What you're looking for:	Keyword	List Filter/Search
Request (i.e., REQ001248)	Requests	Number, Requested For, Assigned To, Opened, Updated, Short Description, Request State, Due Date, State
RITM (i.e., RITM0010309)	Items	Number, Item, Stage, Request, Description, Requested For, Opened By, Assignment Group, Assigned To, Opened, Due Date
Task (i.e., SCTASK0010402)	Tasks	Number, Priority, State, Short Description, Assignment Group, Assigned To

ServiceLink Roles & Provisioning

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

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

Department Initiator

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

Department Fulfiller

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

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

FAU Approver

EACS for ServiceLink FAU Approver is assigned only to Financial Managers/Analysts.

Application Role for Department FAU Approver is:

- Position Management FAU Approver

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

AP/HR Central Office Approver

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

SSC Fulfiller

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

Application Roles for SSC Fulfiller are:

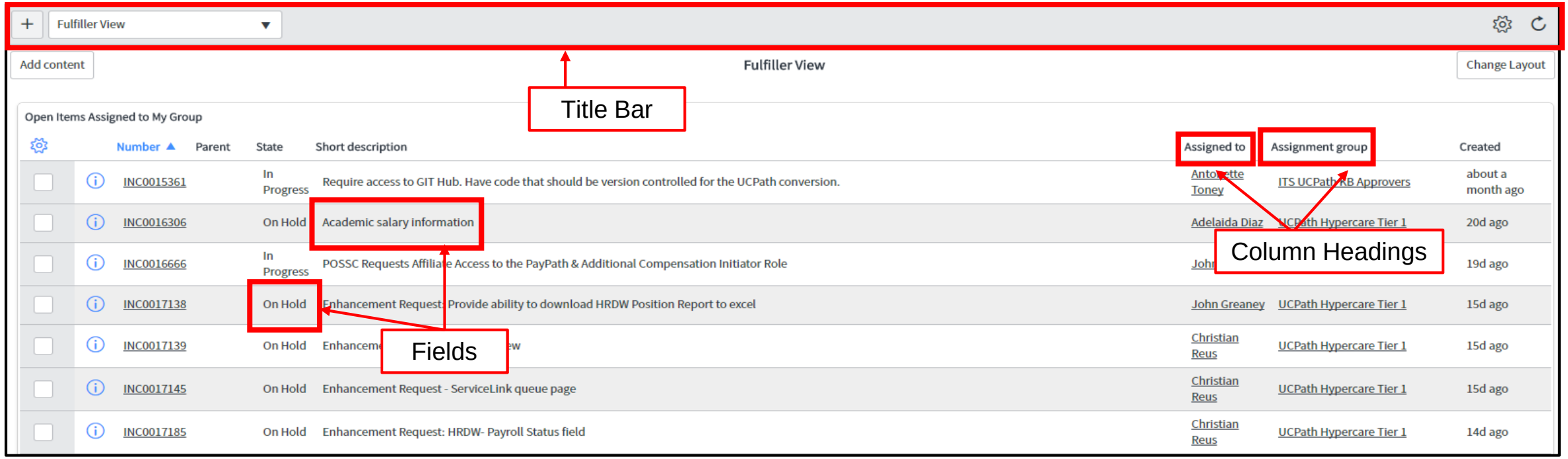
- Extended Leave Shared Services Fulfiller
- Generic Shared Services Fulfiller
- Job Data Change Shared Services Fulfiller
- Offboarding Shared Services Fulfiller
- Onboarding Shared Services Fulfiller
- Payroll Adjustments Shared Services Fulfiller
- Position Management FAU Shared Services Fulfiller
- Position Management Shared Services Fulfiller

Using Lists in ServiceLink

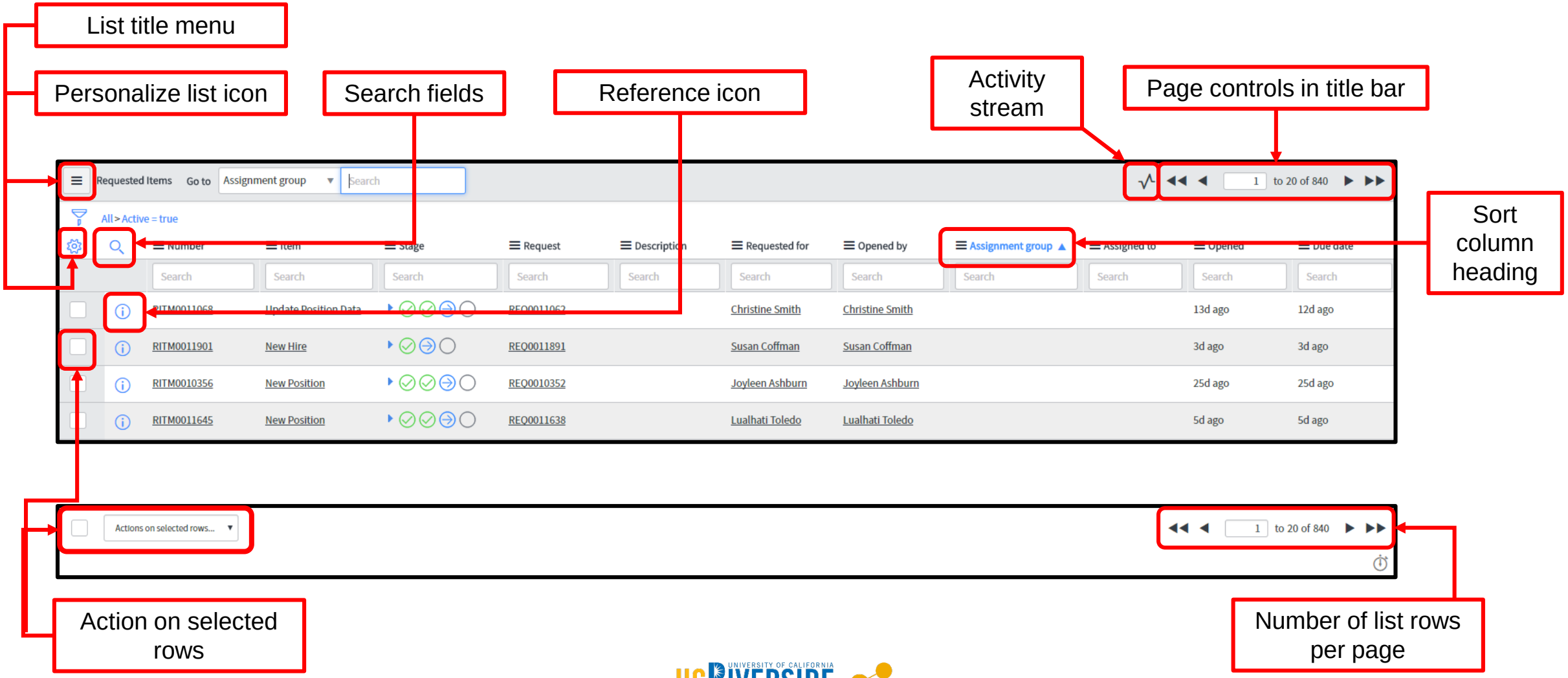
Lists

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

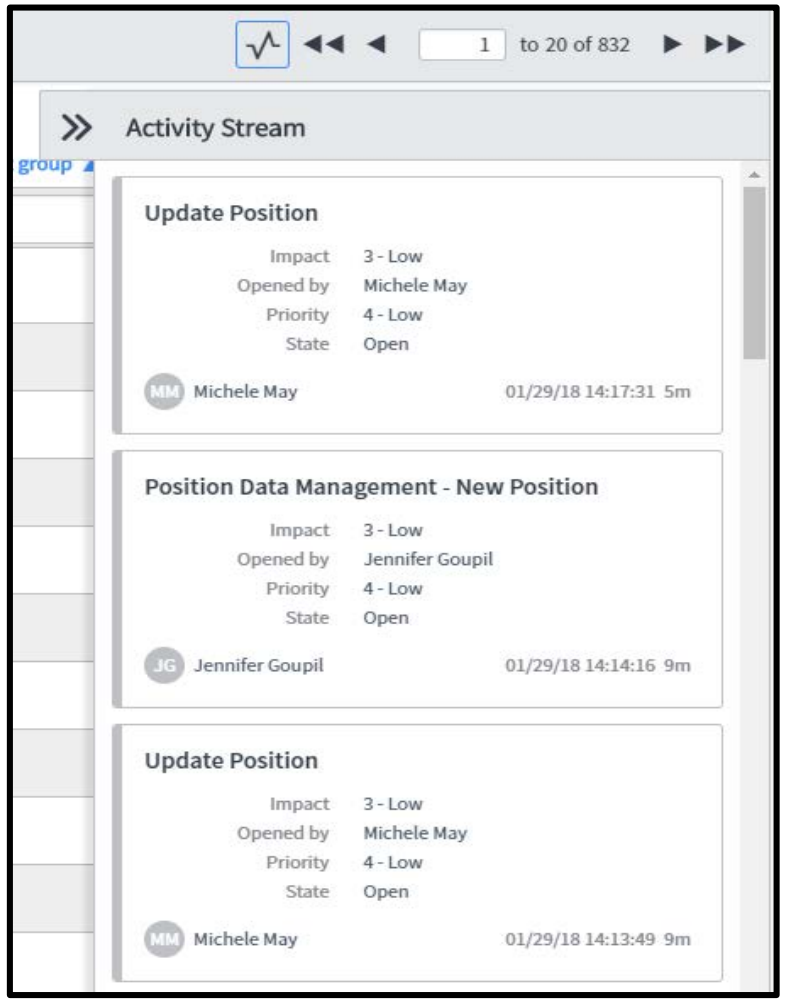


Sorting Column Headings

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:

Option	Description
Filters	Changes the values in the filter. Some of the choices are: **None**, **Active**, and **Edit personal filters**.
Group by	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.
Show	Changes the number of rows shown on each page of the list.
Refresh List	Refreshes the link to show changes immediately.
Create favorite	Adds a link to this list to your favorites.

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.

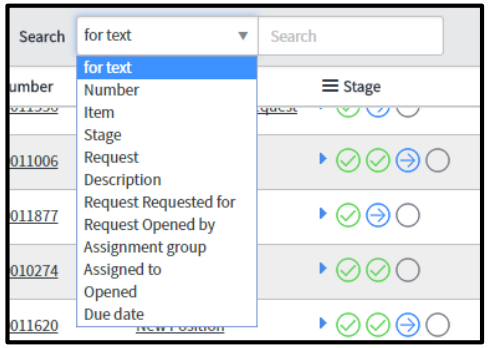
Search a List

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 option 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.

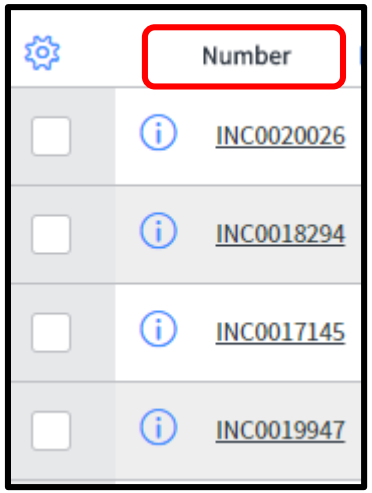
Wildcard	Description
*search-term %search-term%	Search for values that contain search-term
%search-term	Search for values that end with search-term
search-term%	Search for values that start with search-term
=search-term	Search for values that equal search-term
!*search-term	Search for values that do not contain search-term
!%search-term	Search for values that do not end with search-term
!=search-term	Search for values that do not equal search-term

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.

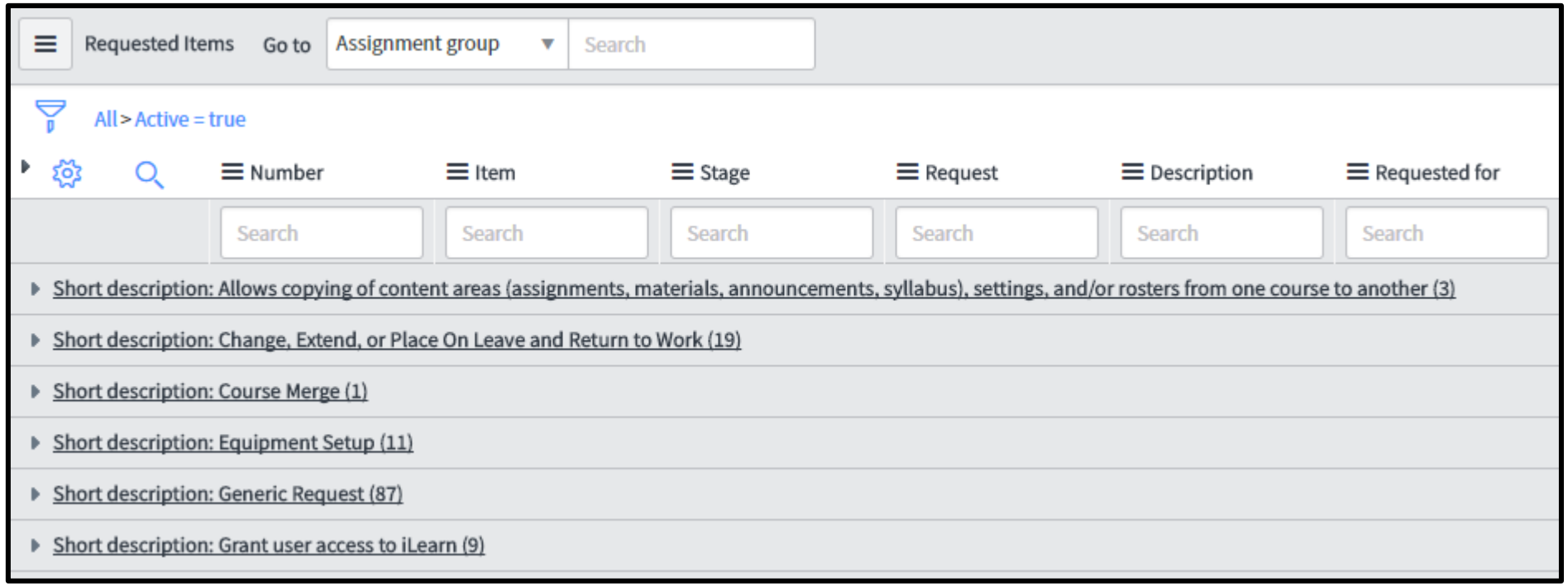
NOTE: ServiceLink treats some string fields that contain record numbers as numeric fields. Any field with the name number is treated as a numeric field. The field label has no effect on search results.



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:



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

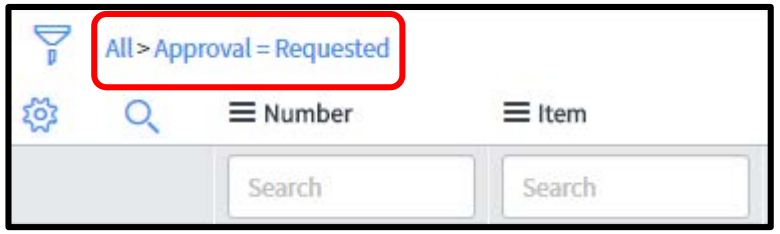
Option	Description
To expand or collapse a group	Click the arrow next to the group name
To expand or collapse all groups	Click the arrow at the top of the list
To open the full list for a group	Click the group name
To see all records for a given group	Open the full list

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

Filters and Breadcrumbs

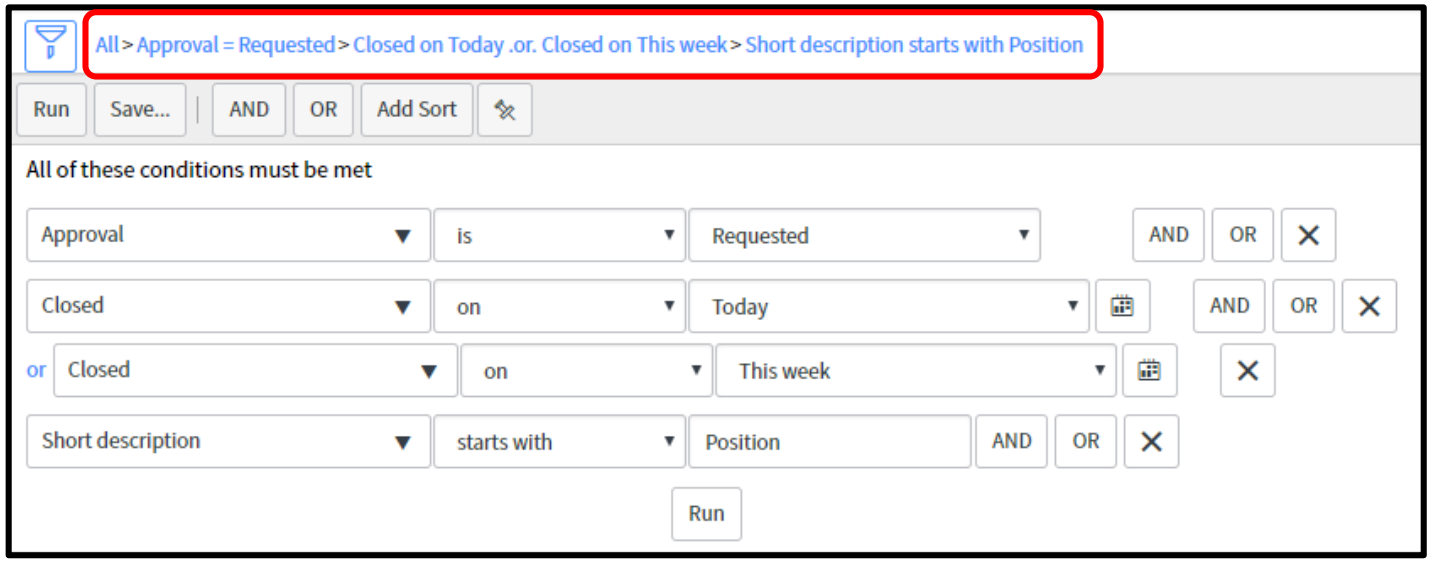
A filter is a set of conditions applied to a table to help you find and work with a subset of the data in that table. You can apply, modify, create, and save filters. A hierarchical list of conditions at the top of the table – breadcrumbs – indicates the current filter.

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

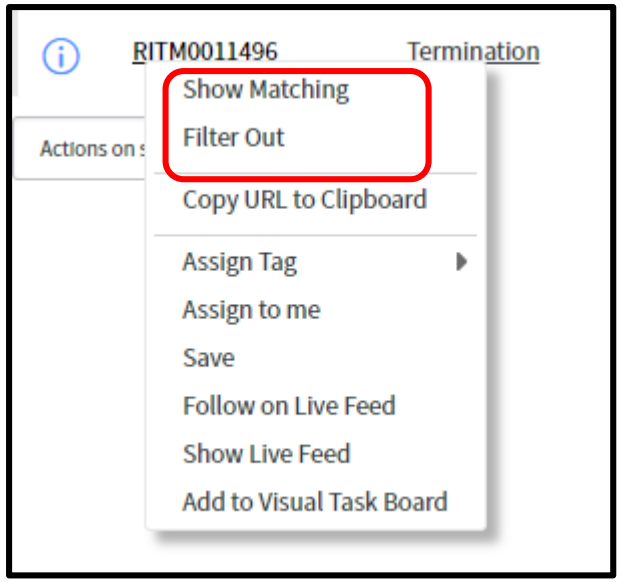


Click a breadcrumb to refresh the list of records and show the latest information for those records

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.

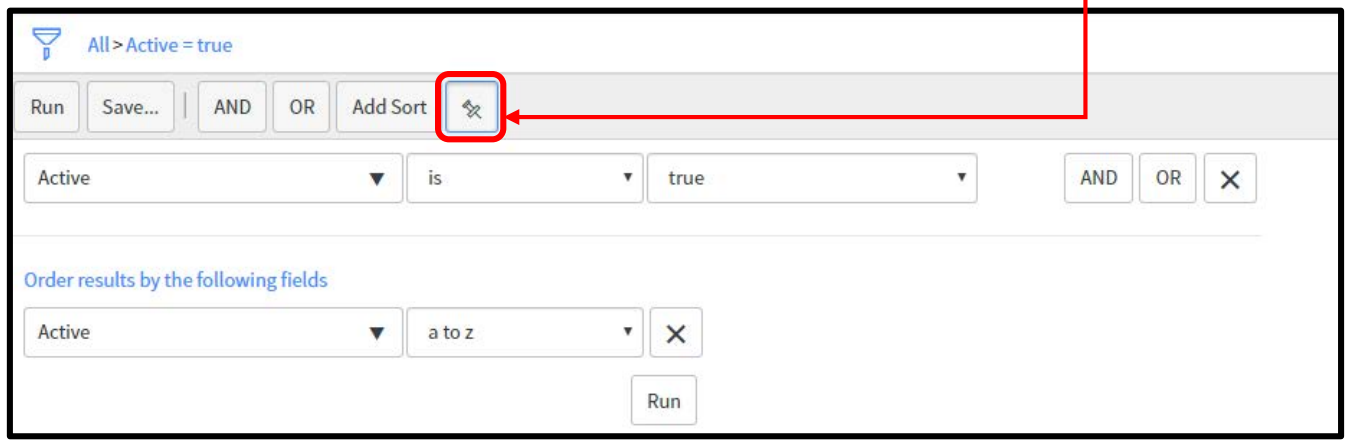
Filters

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.

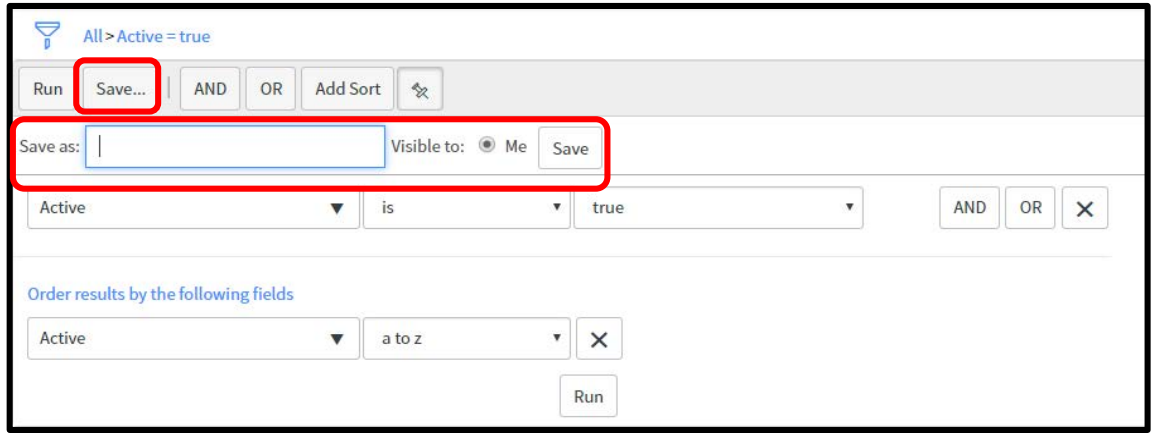
3. Select an **operator** from the list.
4. Select or enter a **value**, if appropriate.
5. Add or remove conditions to construct the desired filter by completing one or more of the following steps:

Option	Description
To add a top-level condition	Click **AND** or **OR** on the condition builder toolbar, above the conditions
To add a dependent condition	Click **AND** or **OR** beside the condition
To remove a condition	Click **x** beside the condition

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]**

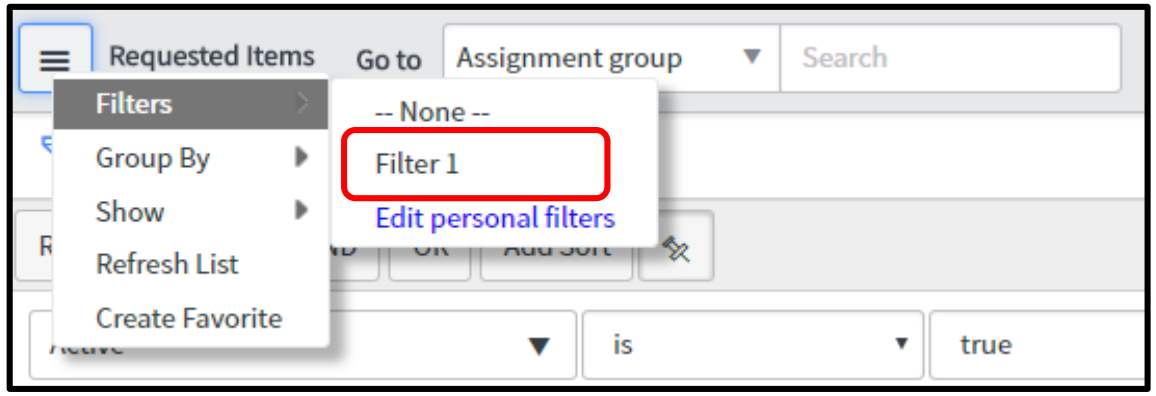
Using the Condition Builder (cont.)

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.



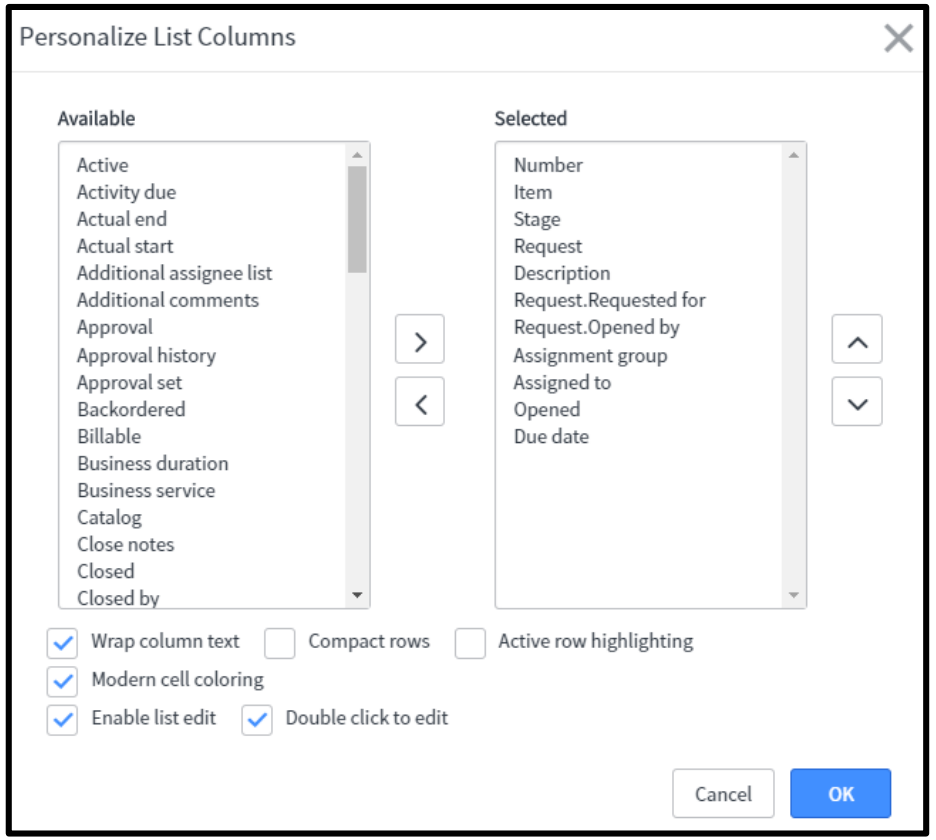
Save and use filters in a list view

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

Option	Description
Display long text on more than one line	Select the **Wrap column text** check box. Clear the check box to display text on one line
Condense the vertical space between rows	Select the **Compact rows** check box. Clear the check box to use standard row spacing

Personal Lists (cont.)

Option	Description
Highlight list rows as the cursor passes over them	Select the **Active row highlighting** check box. Clear the check box to restore the static, alternate row highlighting.
Use updated field status indicators	Select **Modern cell coloring** check box.

5. Select list editing options

Option	Description
Allow the list editor to open for the list	Select the **Enable list edit** check box. Clear the check box to prevent the list editor from opening the list.
Open the list editor with a double-click	Select the **Double click to edit** check box. Clear the check box to open the list editor using a single click.

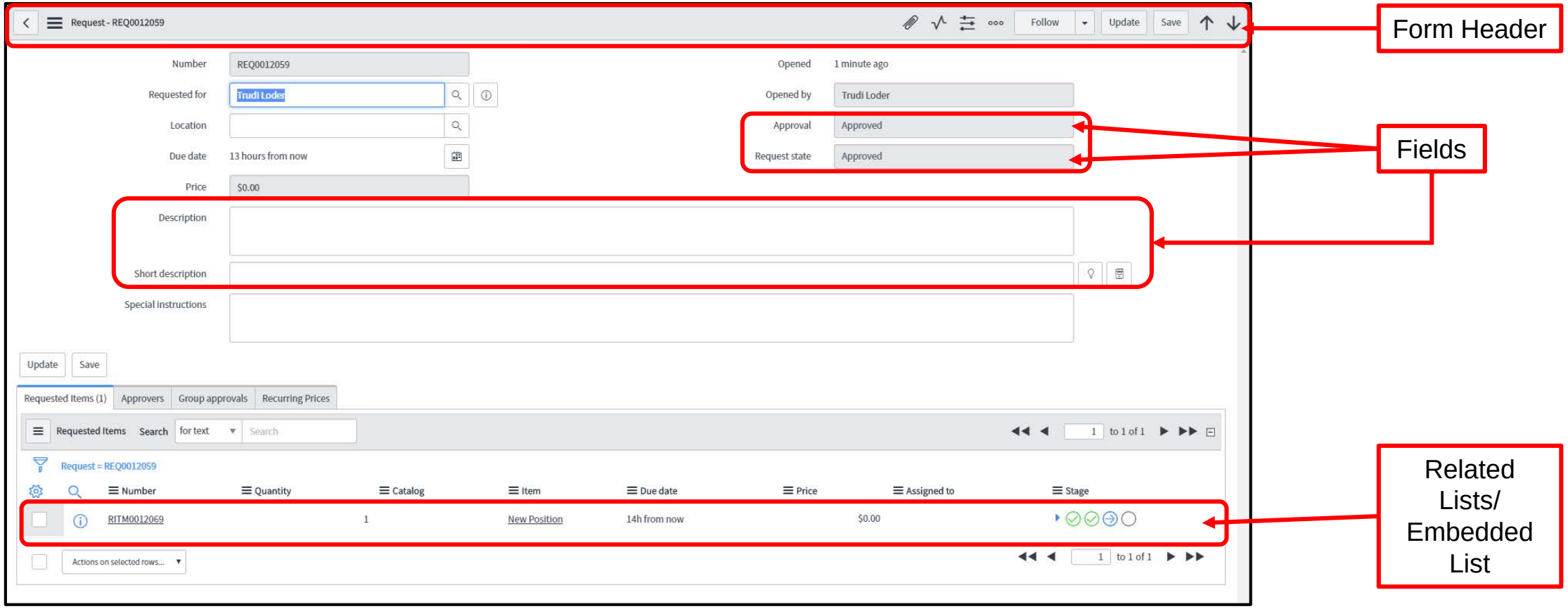
6. Click **OK**

- 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

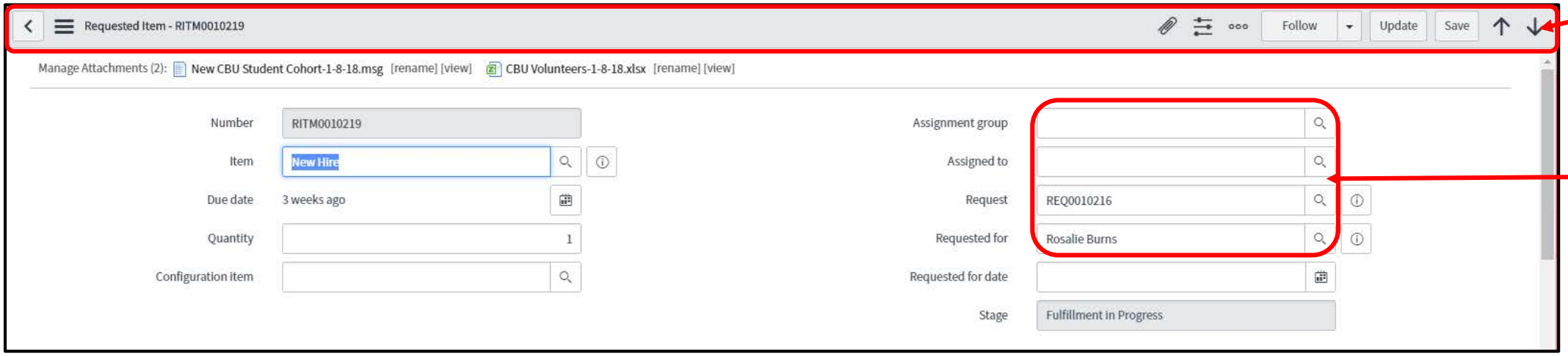
Using Forms in ServiceLink

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:

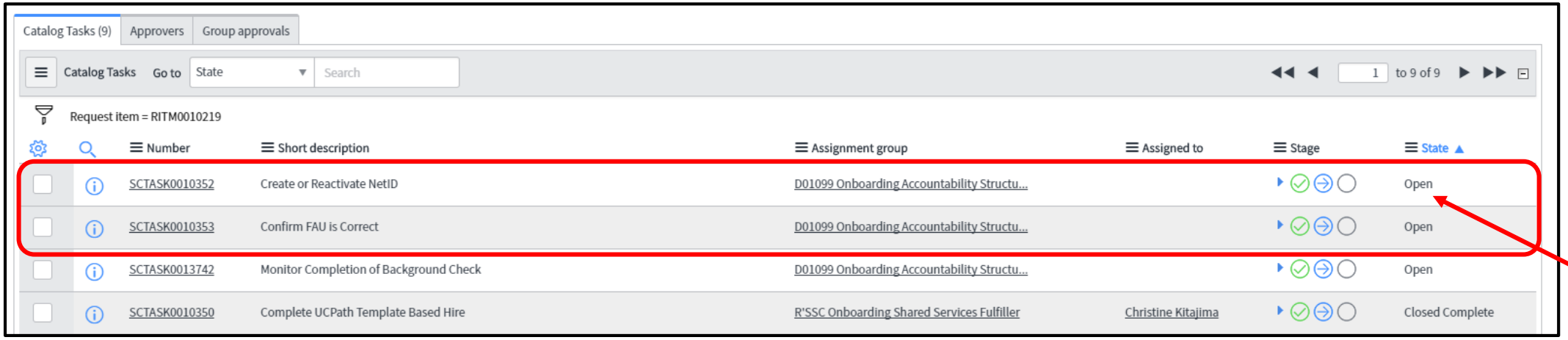


Forms (Items)



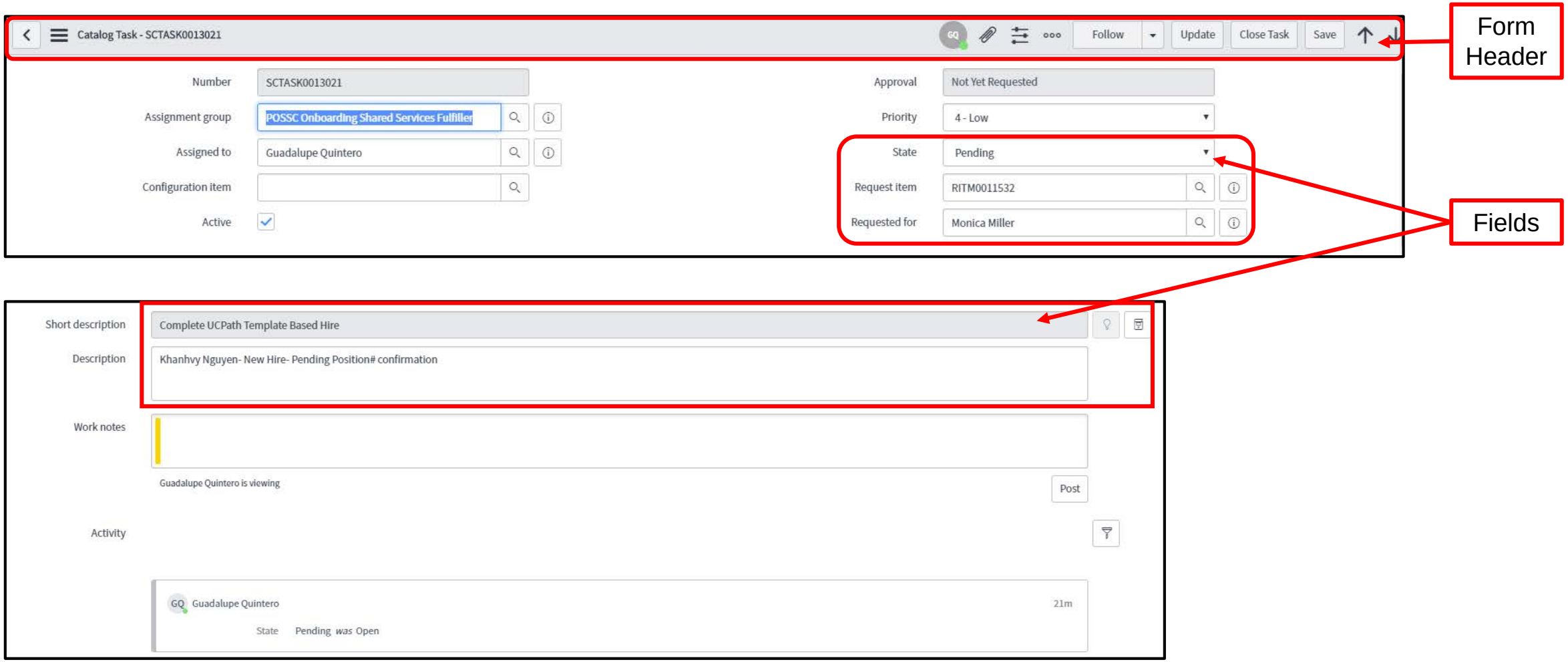
Form Header

Fields

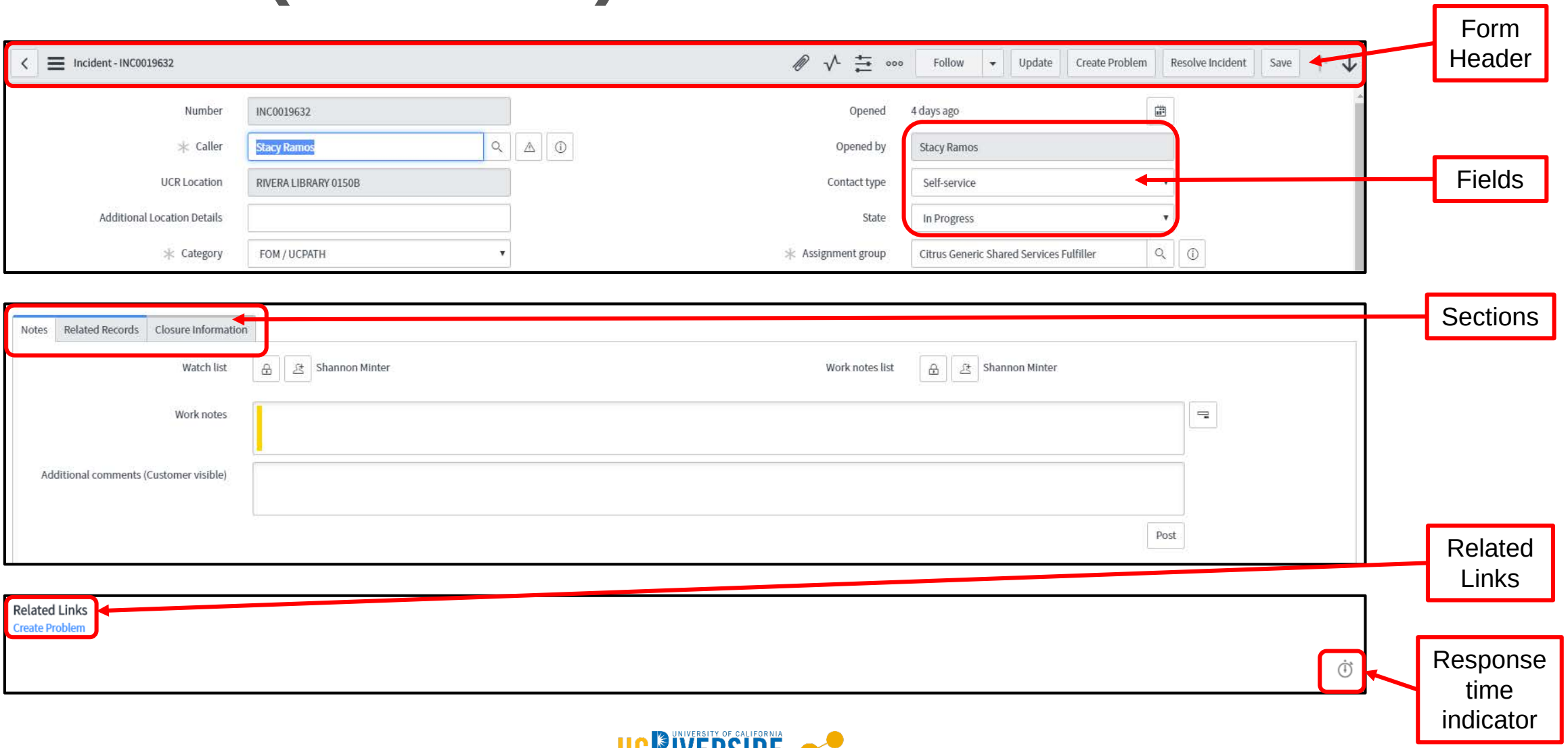


Related Lists/ Embedded List

Forms (Tasks)


Catalog Task - SCTASK0013021
Follow
Update
Close Task
Save
Form Header
Number
SCTASK0013021
Assignment group
POSSC Onboarding Shared Services Fulfiller
Assigned to
Guadalupe Quintero
Configuration item
Active
Approval
Not Yet Requested
Priority
4 - Low
State
Pending
Request item
RITM0011532
Requested for
Monica Miller
Fields
Short description
Complete UCPath Template Based Hire
Description
Khanhvy Nguyen- New Hire- Pending Position# confirmation
Work notes
Guadalupe Quintero is viewing
Post
Activity
GQ Guadalupe Quintero
21m
State Pending was Open

Forms (Incident)

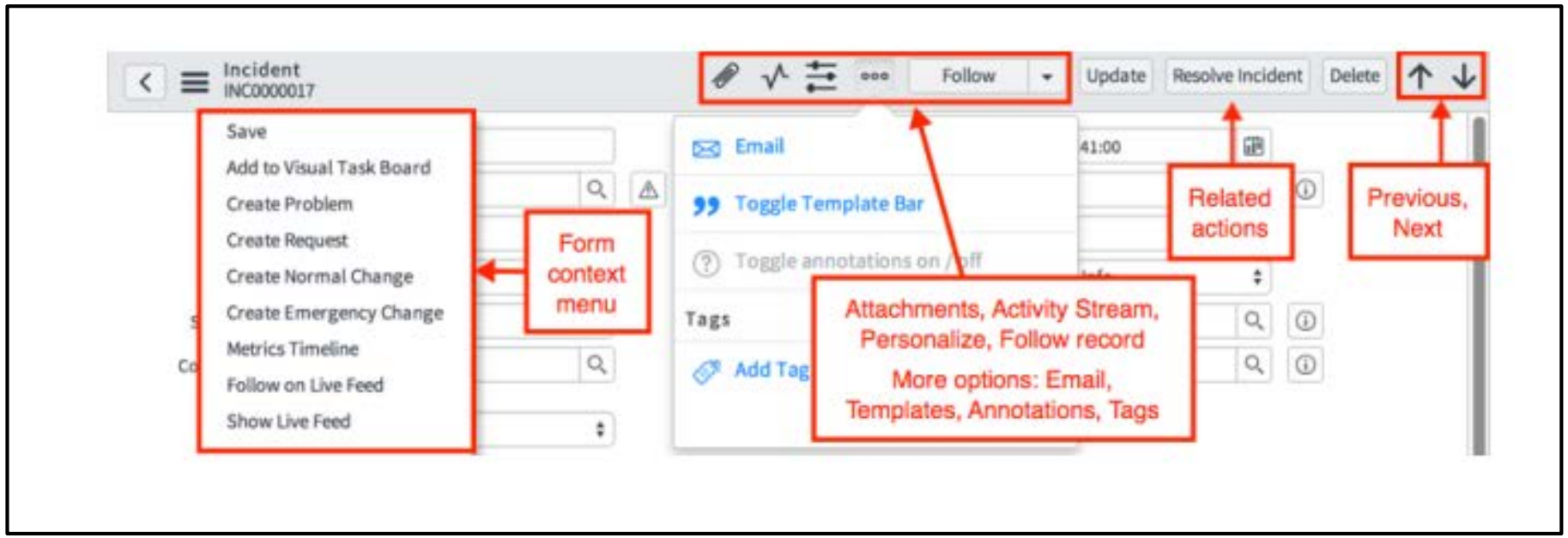


Form Elements

Form Element	Function
Form Header	Provides navigation tools and actions related to the record
Fields	Stores specific data about the record. Can appear and be sorted on a List.
Sections	Groups related information on the form. To enable or disable form tabs, click the gear icon in the Banner Frame and toggle to **Tabbed Forms** option. 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.
Related Links	Provides access to additional functions based on record type and system setup.
Related Lists	Displays records in other tables that have relationships to the current record.
Embedded Lists	Allows for editing related lists without having to navigate away from the form. Changes are saved when the form is saved.
Response Time indicator	Appears at the bottom of some forms to indicate the processing time required to display the form.

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:

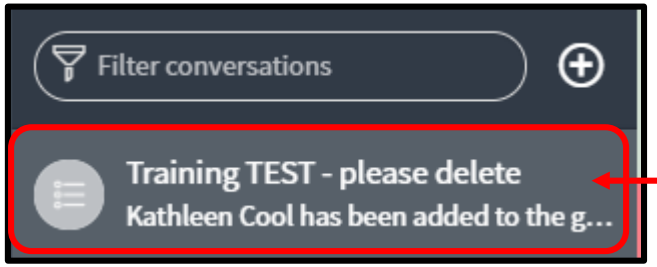


Form Header Controls

Control	Icon	Description
Back		Navigates to the previously viewed page without saving changes
Form context menu		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
Attachments		Allows users to view and add attachments to the record
Show activity stream		Moves focus to the journal entry section of the form
Personalize form		Opens the form personalization menu
More options		Opens additional options, which include, Toggle Template Bar and Add Tag
Toggle template bar		Opens a bar at the bottom of the form and lists available templates
Add tag		Displays the option to create custom tags and categorize documents

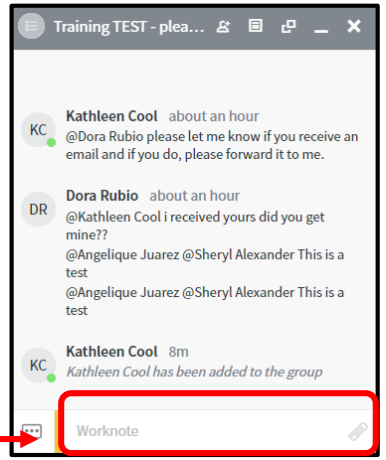
Form Header Controls (cont.)

Control	Icon	Description
Follow	Follow	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)
Update	Update	Saves record and redirects to previous screen
Save	Save	Saves record and remain on the record
Previous and Next	↑ ↓	Opens the previous and next record on the list for which the record was accessed



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)

Open Items Assigned to My Group

Number	Parent ▲	State	Short description	Assigned to	Assignment group	Created
INC0020026		Resolved	Missed cut off to submit timesheet	Sonya Potter	UCPath Hypercare Tier 1	21h ago
INC0018294		In Progress	submit button not working.		UCPath Hypercare Tier 1	13d ago

My Work (open tasks assigned to me)

My Work

Number	Parent ▲	State	Short description	Assigned to	Assignment group	Created
No records to display						

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

Closed Tasks

Number	Parent ▲	State	Short description	Assigned to	Assignment group	Created
INC0017714		Closed	Silvestre Aceves Reyes needs home department changed on time sheet.	Sonya Potter	UCPath Hypercare Tier 1	18d ago
INC0018393		Closed	Unable to term "Contigent Workers" from the system due to them not having a position number. We have several that should be termed effective 12/31/17.	Kathleen Cool	UCPath Hypercare Tier 1	12d ago

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)

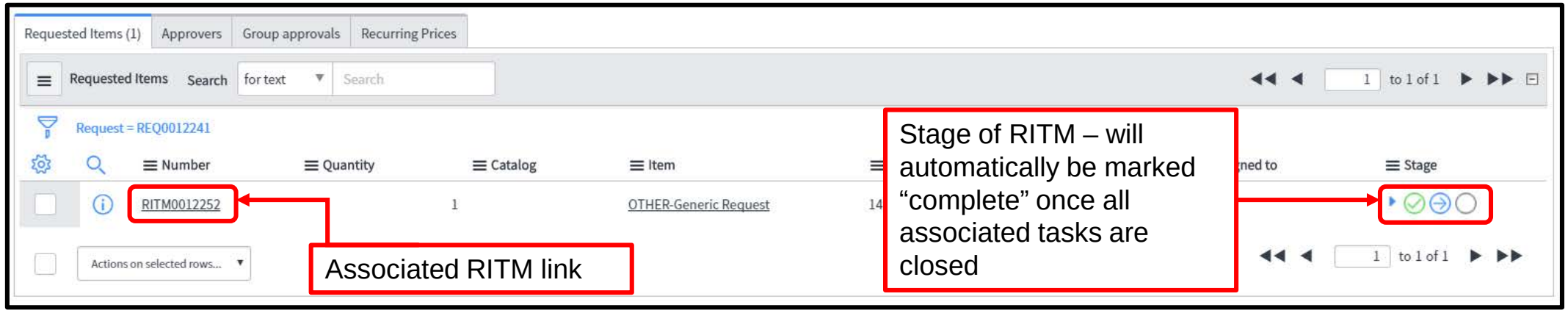
The Request is then assigned a RITM number (Request Item). The RITM acts like a shopping cart where one or more tasks, depending on the request, can be added. These tasks then become the “children” to the RITM “parent”

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.

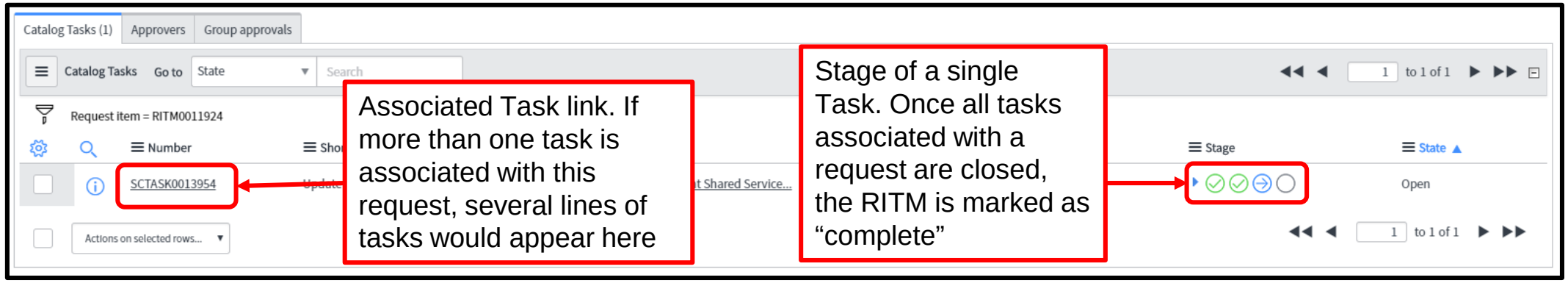
Once all Tasks with a RITM “Shopping Cart” have been closed, the Request Item is closed and marked as complete

Request/RITM/Task Relationship

Requested Items under the Request Form

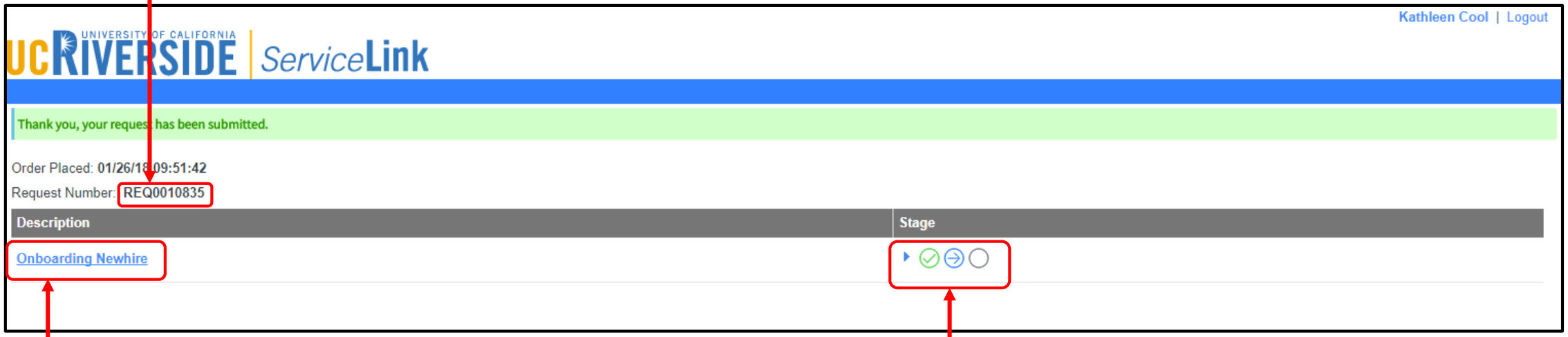


Catalog Tasks under the RITM Form



Requests

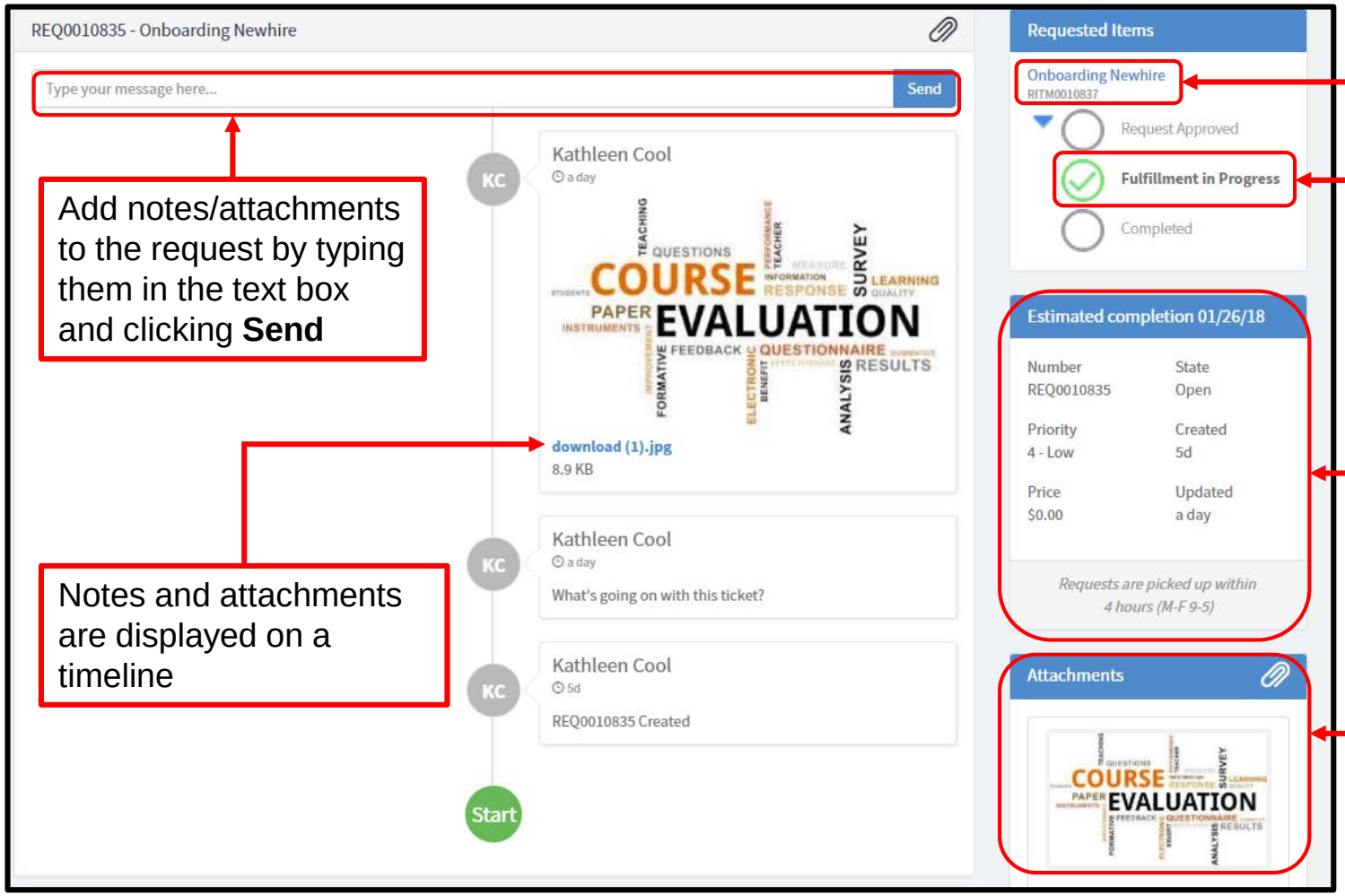
Request Number (i.e., REQ0010835) – request will be assigned a RITM number in the Fulfiller view, along with tasks, as needed



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)



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

Notes and attachments are displayed on a timeline

Provides hyperlink to request data and RITM Number

Provides a status of the request

Estimated completion and other information pertaining to the request

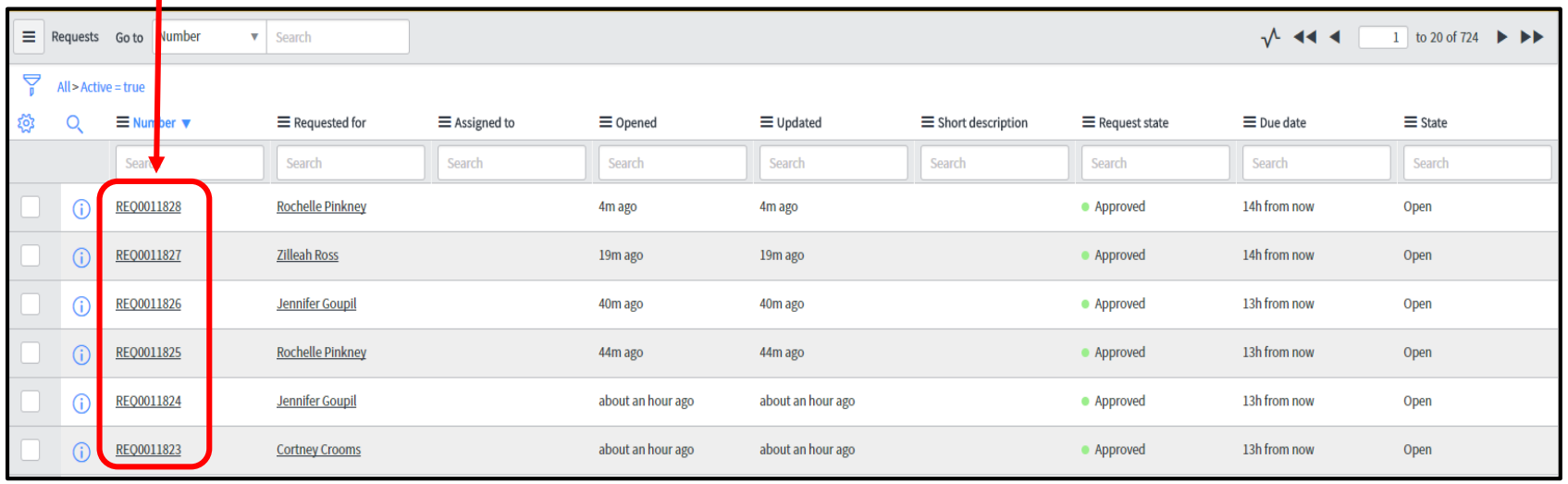
View of attachments

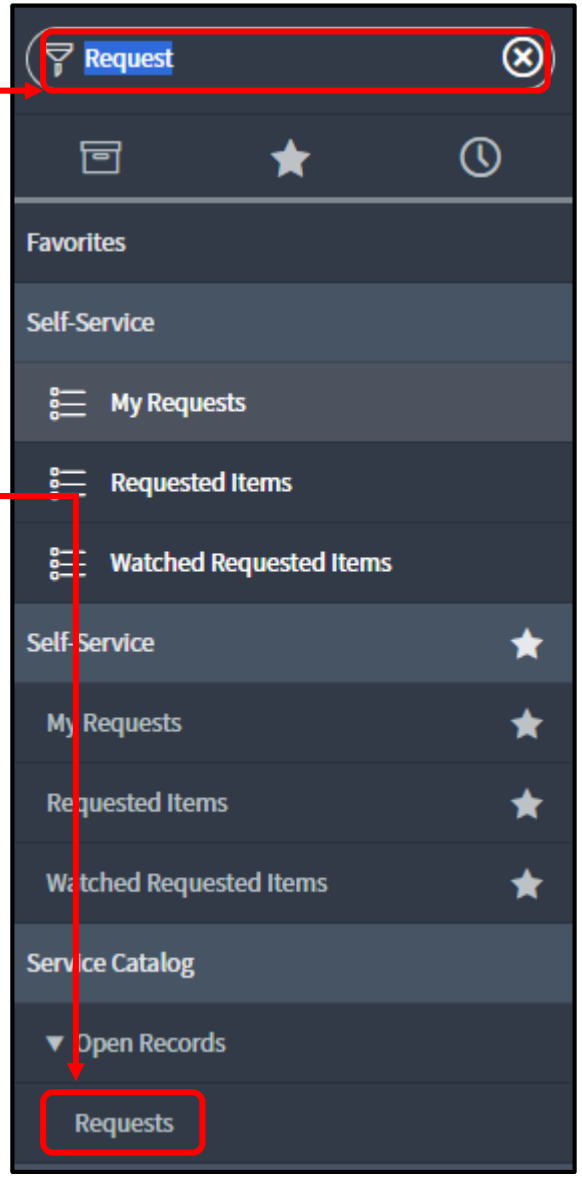
How to Search for Requests

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



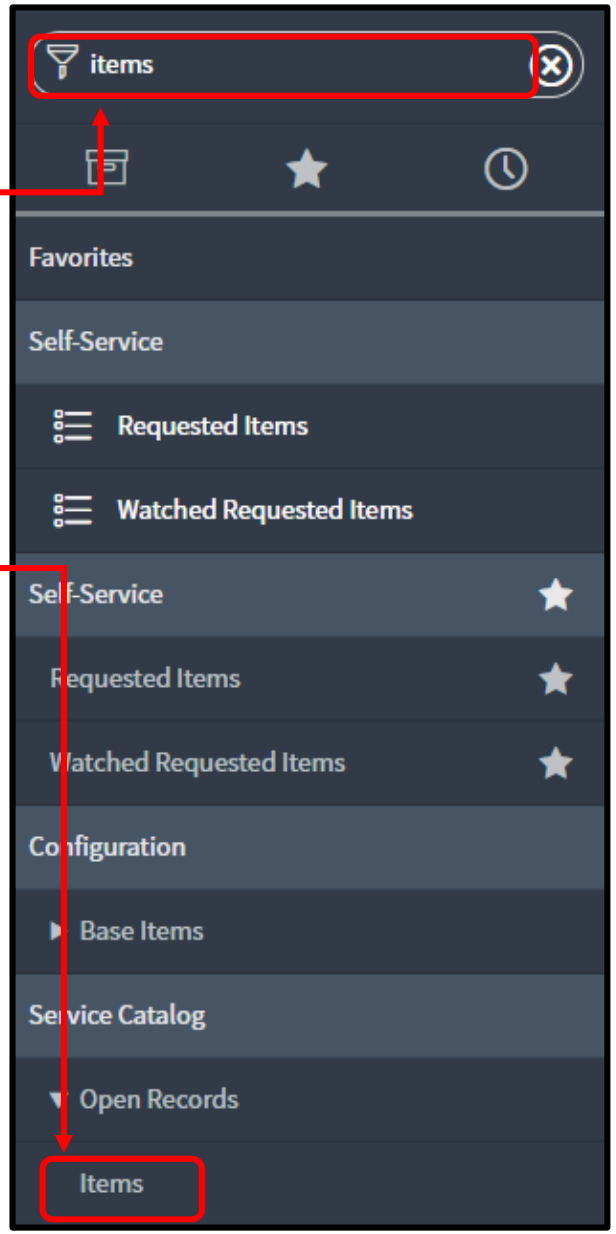


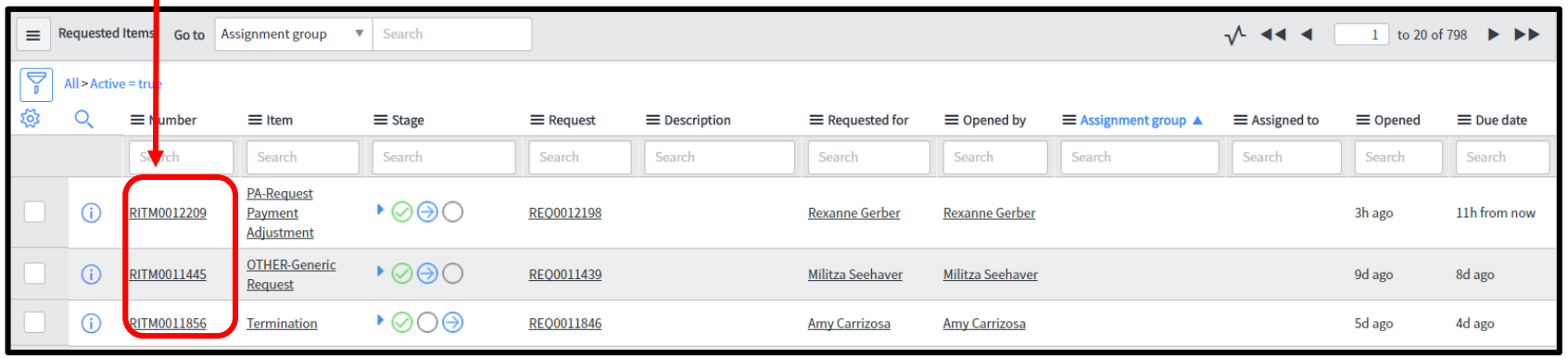
How to Search for a RITM

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





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RITM Do’s and Dont’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:

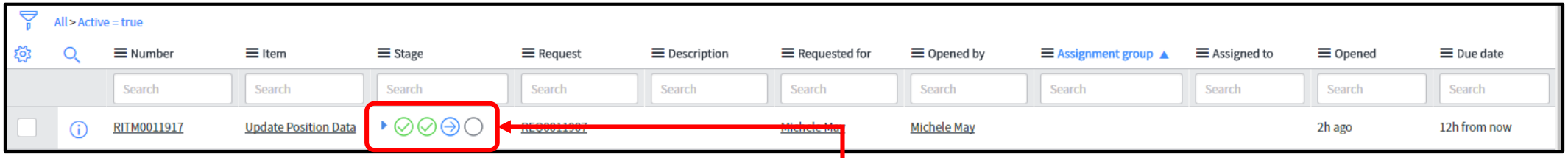
DO’s

- 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.

DONT’s

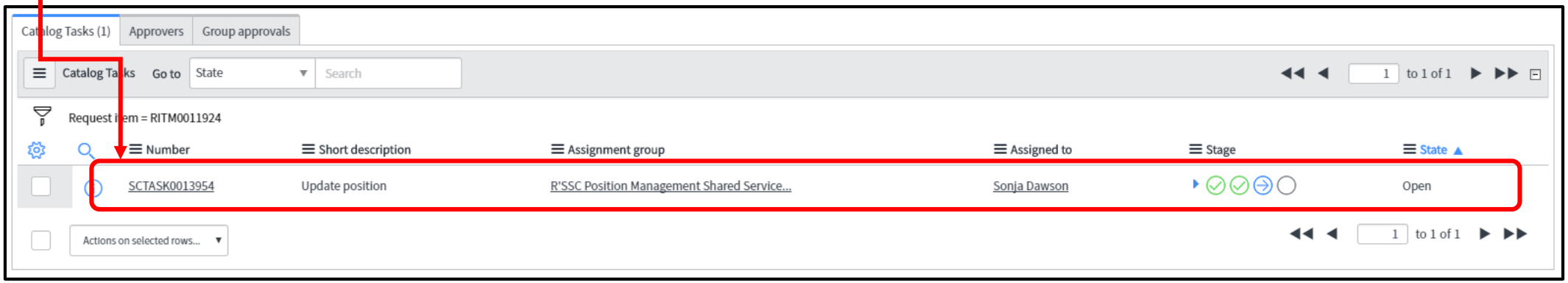
- Don’t assign an RITM to yourself. If you do, it will remain in your My Work queue until all associated tasks are closed.
- Don’t enter Work notes or Additional comments when referring to an associated task, such as FAU approval. These comments should be entered in the Work notes and/or Description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

Tracking Tickets

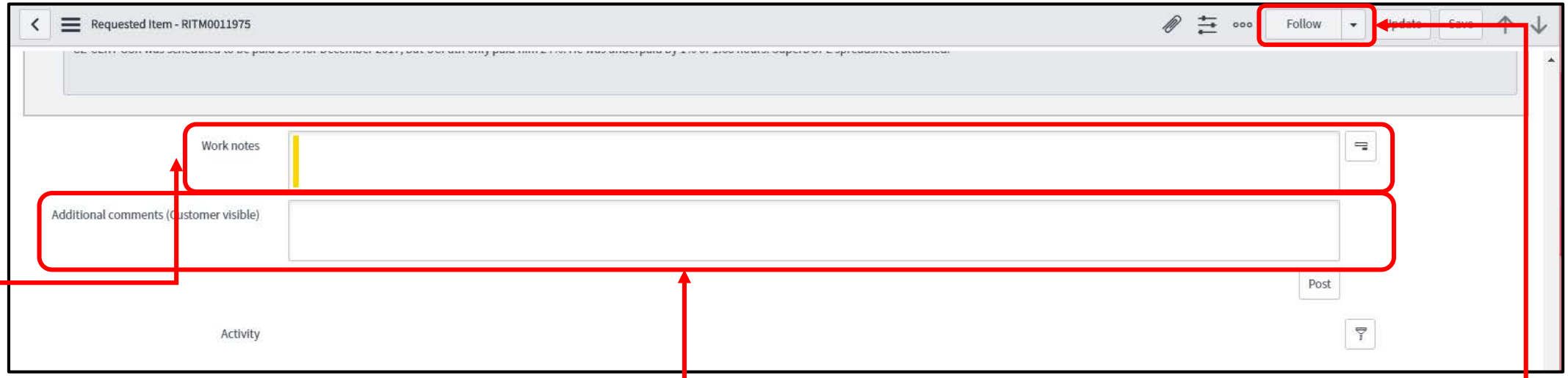


The Stage of every RITM is displayed in List and is a searchable/filterable field

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



Creating Notes in Request Items

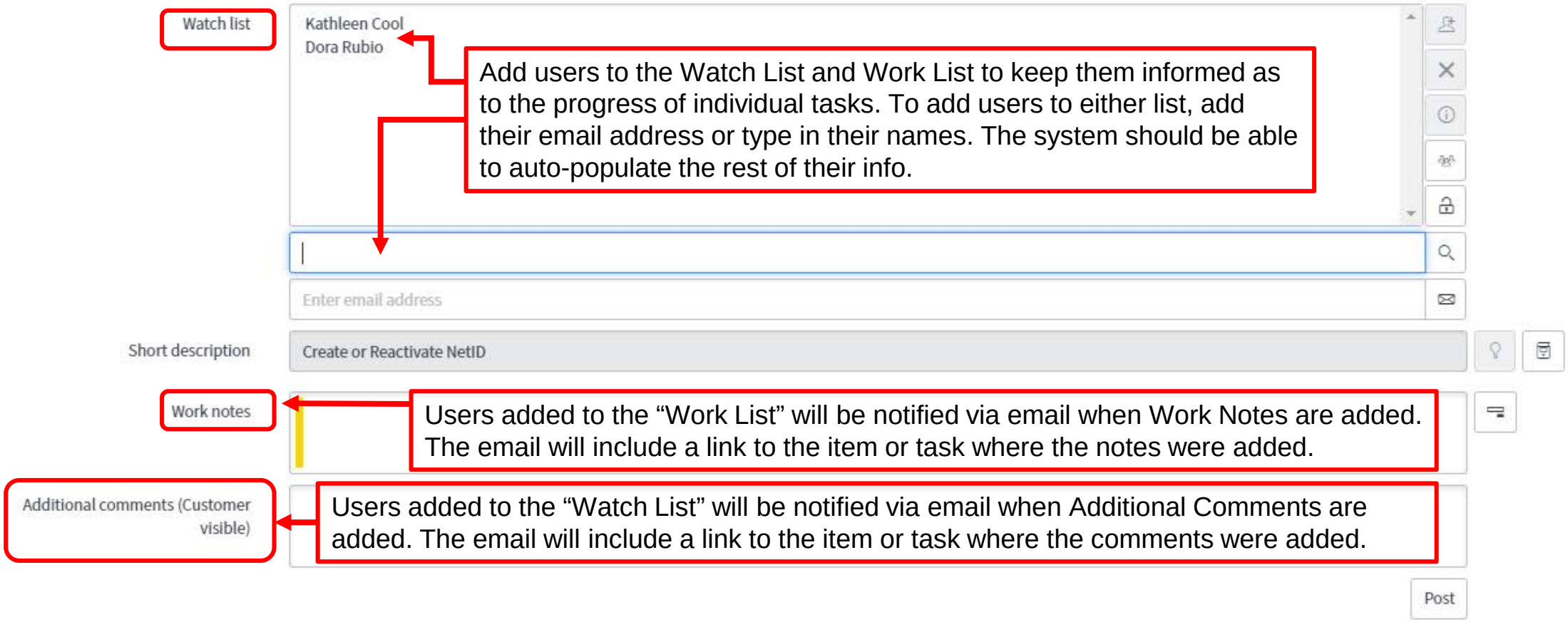


Work notes are meant for internal use only. Users added on the “Work List” will be notified via email of all Work Notes added.

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

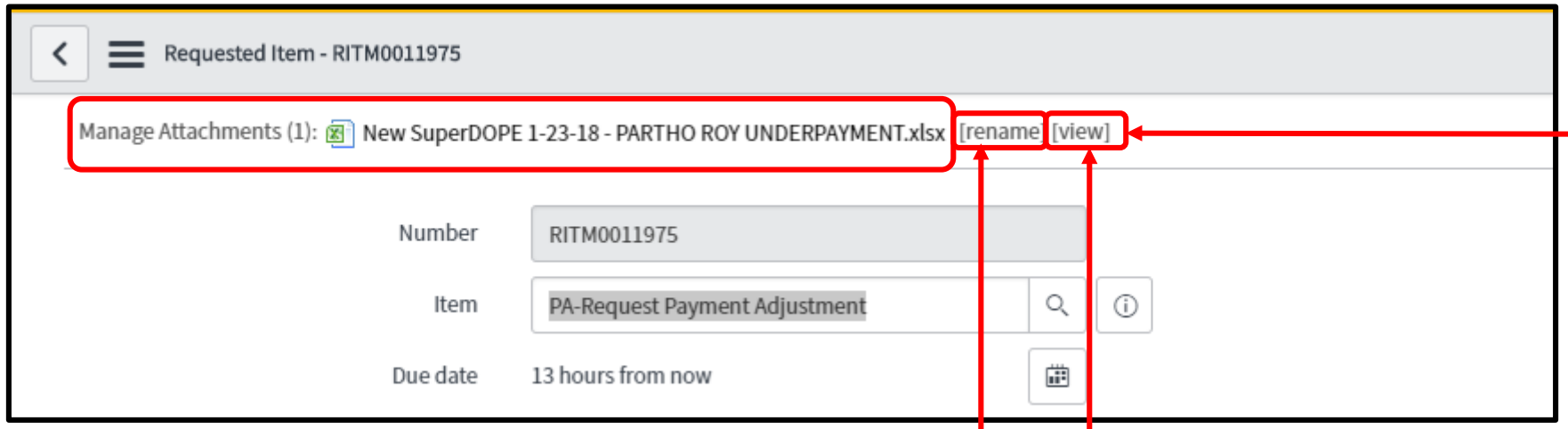


Add users to the Watch List and Work List to keep them informed as to the progress of individual tasks. To add users to either list, add their email address or type in their names. The system should be able to auto-populate the rest of their info.

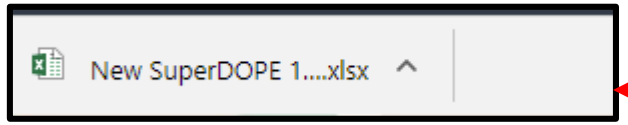
Users added to the “Work List” will be notified via email when Work Notes are added. The email will include a link to the item or task where the notes were added.

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.

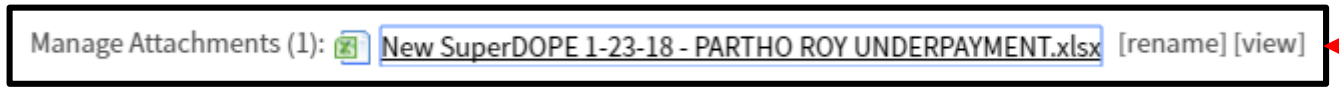
Attached Documents



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

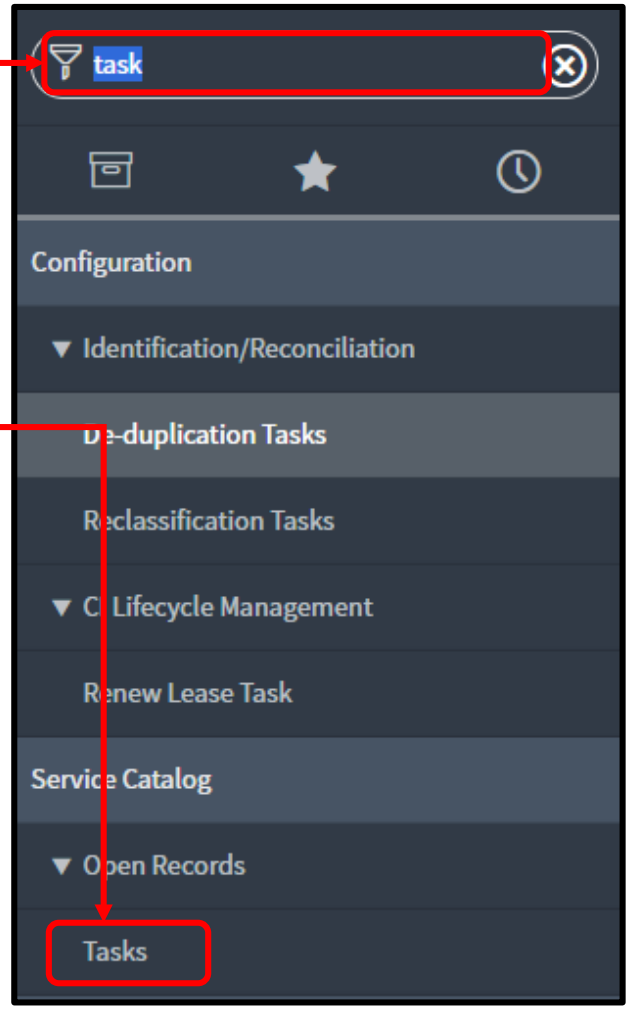
Why Tasks Matter

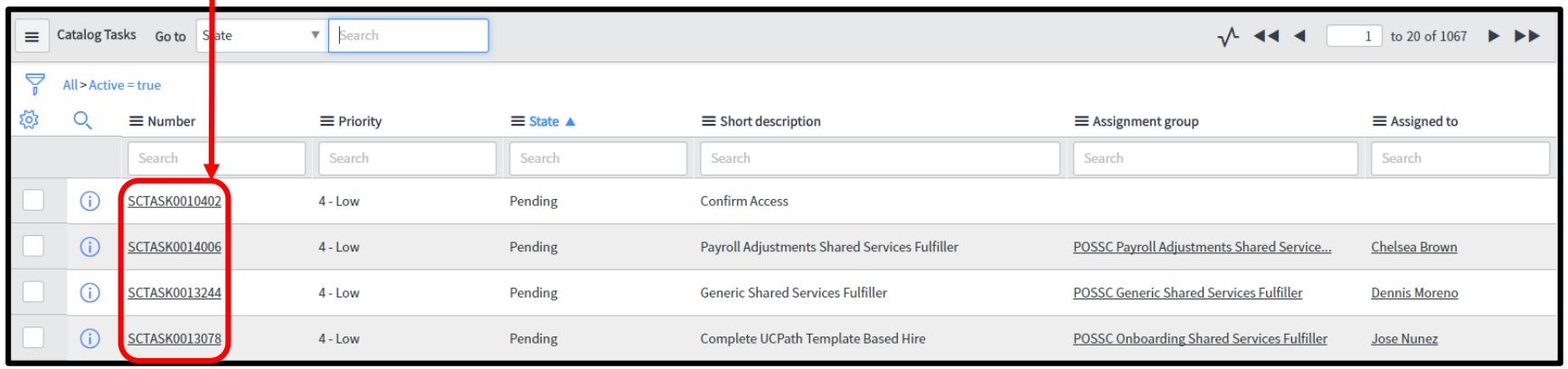
How to Search for a Task

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 Dont’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

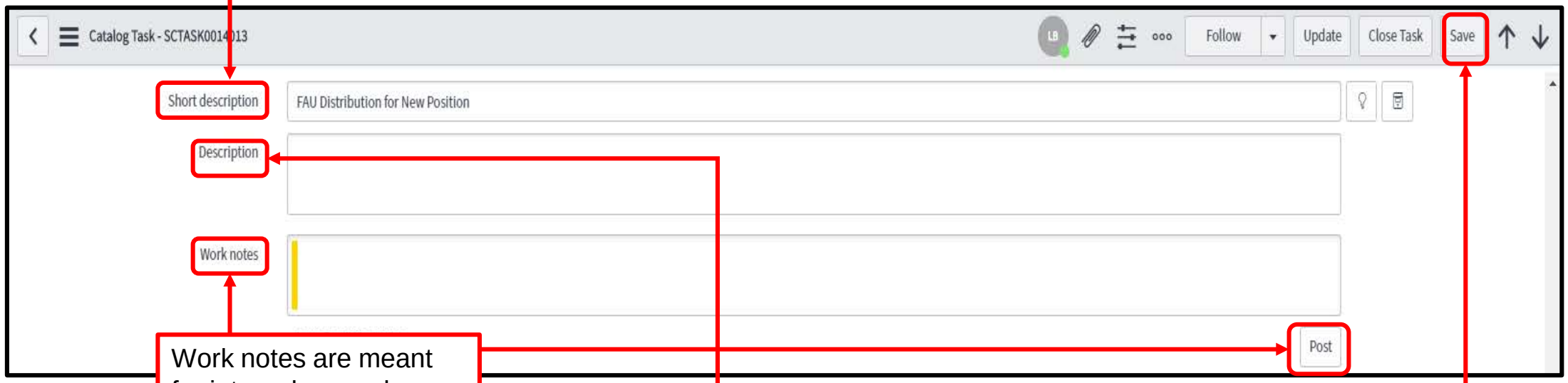
- Do assign a task to yourself
- Do periodically search for tasks with Assignment Groups that start with client Departments and Organizations. That way you can proactively track tasks that are “stuck” or coming down the pipeline.
- Do close tasks (click the “Close Task”) button when completed.
- Do write 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.

DONT’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

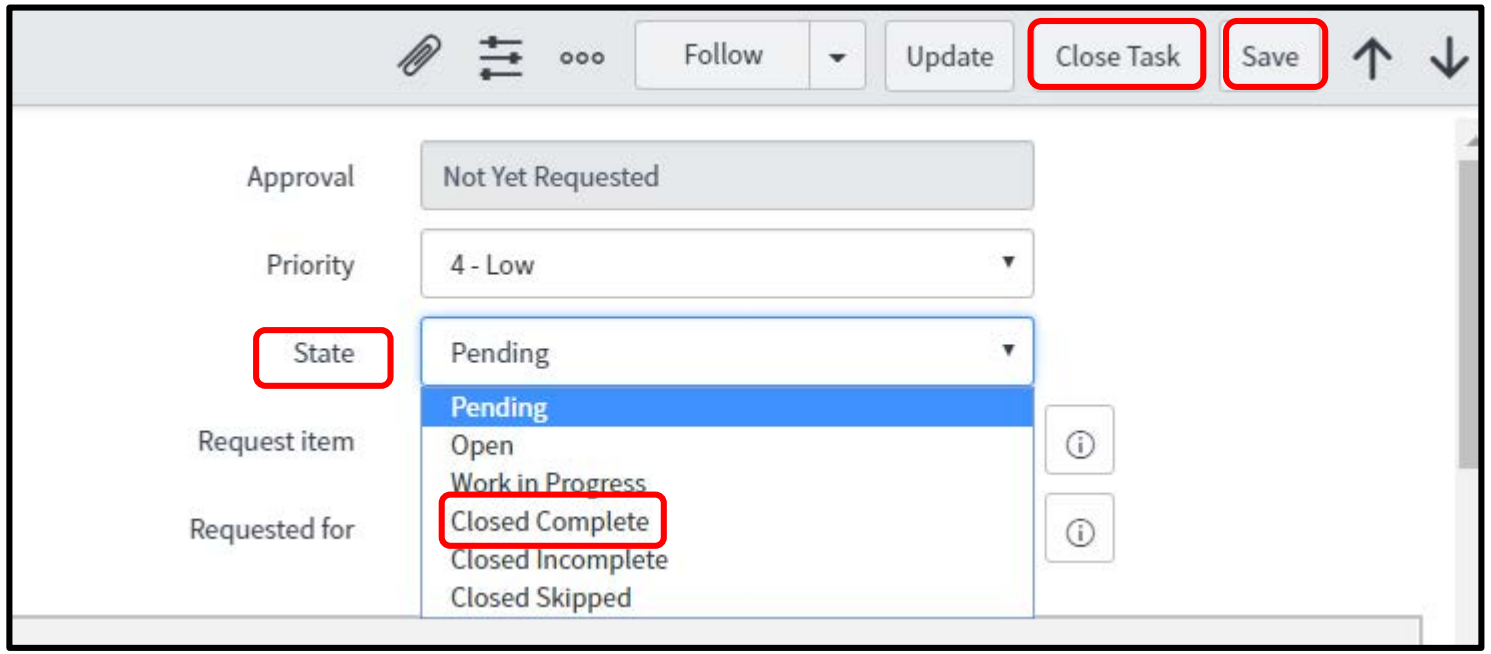
Short description is considered a "Field" and is searchable/filterable



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.

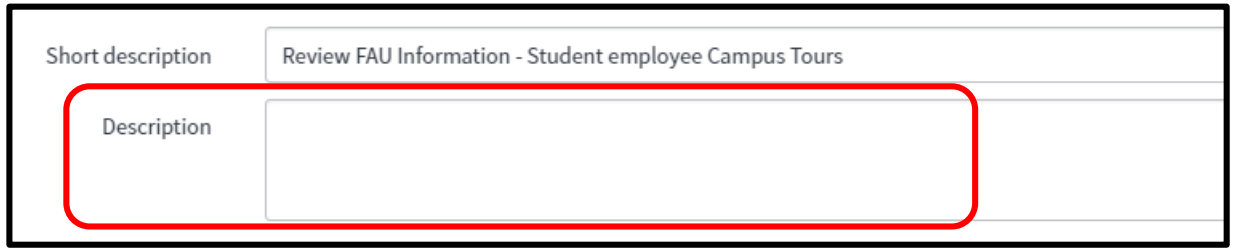
In tasks, client-facing notes such as FAU confirmation, should be made in "Description." To save a note made in "Description," click the "Save" button in the Form Header.

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:

SCTASK0011945	Review FAU Information	ORG25 Position Management FAU Approver		Closed Complete

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.”

SCTASK0014871	Create a new position	POSSC Position Management Shared Service...	Rachel Velasquez	Open

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

Catalog Tasks (5) | Approvers | Group approvals

Catalog Tasks Go to State Search 1 to 5 of 5

Request item = RITM0012177

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0014493	Complete UCPath Template Based Hire	Harvest Onboarding Shared Services Fulfi...			Open
SCTASK0014491	Complete Onboarding Packet	Harvest Onboarding Shared Services Fulfi...			Open
SCTASK0014494	Schedule Day 1 In-Person Session	Harvest Onboarding Shared Services Fulfi...			Open
SCTASK0014495	Confirm FAU is Correct	ORG12 Onboarding Accountability Structur...			Open
SCTASK0014492	Create or Reactivate NetID	ORG12 Onboarding Accountability Structur...			Open

Actions on selected rows... 1 to 5 of 5

Onboarding Tasks (cont.)

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

Catalog Tasks (7) | Approvers | Group approvals

Catalog Tasks Go to State Search 1 to 7 of 7

Request item = RITM0012177

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0014496	Conduct Day 1 In-person Session	Harvest Onboarding Shared Services Fulfi...			Open
SCTASK0014497	Send NetID to Employee	ORG12 Onboarding Accountability Structur...			Open
SCTASK0014493	Complete UCPath Template Based Hire	Harvest Onboarding Shared Services Fulfi...			Closed Complete
SCTASK0014491	Complete Onboarding Packet	Harvest Onboarding Shared Services Fulfi...			Closed Complete
SCTASK0014494	Schedule Day 1 In-Person Session	Harvest Onboarding Shared Services Fulfi...			Closed Complete
SCTASK0014495	Confirm FAU is Correct	ORG12 Onboarding Accountability Structur...			Closed Complete
SCTASK0014492	Create or Reactivate NetID	ORG12 Onboarding Accountability Structur...			Closed Complete

Actions on selected rows... 1 to 7 of 7

Onboarding Tasks (cont.)

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

Catalog Tasks (9) | Approvers | Group approvals

Catalog Tasks Go to State Search 1 to 9 of 9

Request item = RITM0012177

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0014499	Update Enterprise Directory	ORG12 Onboarding Accountability Structur...			Open
SCTASK0014498	Verify Documents and File Paperwork	Harvest Onboarding Shared Services Fulfi...			Open
SCTASK0014493	Complete UCPath Template Based Hire	Harvest Onboarding Shared Services Fulfi...			Closed Complete
SCTASK0014496	Conduct Day 1 In-person Session	Harvest Onboarding Shared Services Fulfi...			Closed Complete
SCTASK0014491	Complete Onboarding Packet	Harvest Onboarding Shared Services Fulfi...			Closed Complete
SCTASK0014494	Schedule Day 1 In-Person Session	Harvest Onboarding Shared Services Fulfi...			Closed Complete
SCTASK0014497	Send NetID to Employee	ORG12 Onboarding Accountability Structur...			Closed Complete
SCTASK0014495	Confirm FAU is Correct	ORG12 Onboarding Accountability Structur...			Closed Complete
SCTASK0014492	Create or Reactivate NetID	ORG12 Onboarding Accountability Structur...			Closed Complete

Onboarding Tasks (cont.)

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

Catalog Tasks (11) | Approvers | Group approvals

Catalog Tasks Go to State Search 1 to 11 of 11

Request item = RITM0012178

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

Onboarding Tasks – with Visa

When Onboarding an employee on a Visa, the Department Initiator should check the Visa box. Once the SSC Fulfiller 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.

Catalog Tasks (11) | Approvers | Group approvals

Catalog Tasks Go to State Search 1 to 11 of 11

Request item = RITM0012178

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

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:

Request item = RITM0012398

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0015034	Send/Receive Leave Packet	ORG40 Extended Leave Accountability Stru...			Open

Actions on selected rows...

1 to 1 of 1

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.

Request item = RITM0011139

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0013251	Submit UCPath Transaction	Citrus Extended Leave Shared Services Fu...	Nancy Domin		Open

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

Catalog Tasks (4) | Approvers | Group approvals

Catalog Tasks Go to State Search 1 to 4 of 4

Request item = RITM0012179

Number	Short description	Assignment group	Assigned to	Stage	State
SCTASK0014514	Complete UCPath Final Pay Request in UCPath (only applicable if sep. from UC)	Harvest Offboarding Shared Services Fulf...			Open
SCTASK0014511	Complete UCPath Termination Template	Harvest Offboarding Shared Services Fulf...			Open
SCTASK0014512	Identify Employee's final Timesheet in TARS and mark as 'Do not submit to UCPath'	Harvest Offboarding Shared Services Fulf...			Open
SCTASK0014513	Confirm Employee's final timesheet has been submitted and Approved by the supervisor	D01037 Offboarding Accountability Struct...			Open

Actions on selected rows... 1 to 4 of 4

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:

Catalog Tasks (6) | Approvers | Group approvals

Catalog Tasks Go to State Search 1 to 6 of 6

Request item = RITM0012179

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

Actions on selected rows... 1 to 6 of 6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Additional Courses

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

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Training Resources

http://fomucpath.ucr.edu/training/resources.html

Your Feedback Please

https://tinyurl.com/ucrfomucpathfeedback

Thank You