



California
DEPARTMENT OF TECHNOLOGY
Office of Technology Services

Service Request Fulfillment Training External Reports

Date: 12/8/15

Module Objectives

- **Lesson 1: Navigate to My Reports Console**
- **Lesson 2: Report Data Options**
- **Lesson 3: Export Options**
- **Lesson 4: Output Options**
- **Lesson 5: Reporting using “On Behalf of”**

Lesson 1

Navigate to My Reports Console



Using the Application Launcher on the left side of the screen, scroll down to Service Request Management, then Request Entry.

Lesson 1

Navigate to My Reports Console

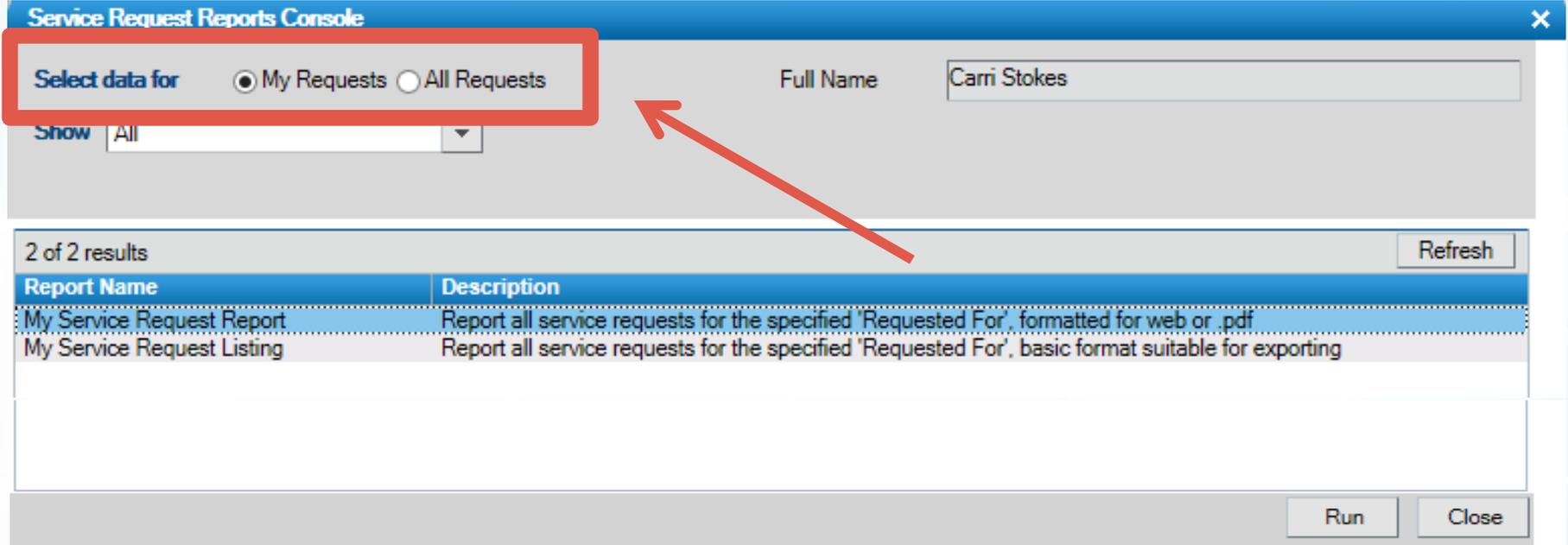
The screenshot displays the Request Service interface. On the left, there is a navigation pane with 'All Categories' and a list of service categories including 'Dept of Technology Employee Services', 'Infrastructure Services', 'Network Services', 'Software Services', 'Email/Mobile Services', 'Professional Services', 'Service Desk Services', and 'Other Services'. Below this is the 'Available Requests' section, which lists 'Active Directory (AD) Administration' as the selected item. The main content area shows the details for 'Active Directory (AD) Administration', including a description: 'Create/Disable AD ID's, folder maintenance, group maintenance'. On the right side, the 'My Requests' section is visible, showing a list of requests. A red box highlights the Print button (represented by a printer icon) in the top right corner of the 'My Requests' section. A red arrow points from the Print button to the 'Request ID' field of the first request entry.

Request ID	Submitted	For	Status
REQ000002087691	9/17/2015 3:38:41 PM	Carri Stokes	Closed
REQ000002082713	8/24/2015 1:08:00 PM	Carri Stokes	Closed
REQ000002079831	8/6/2015 3:35:04 PM	Carri Stokes	Closed

To access the reports console, select the Print button located under the “My Requests” section.

Lesson 2

Report Data Options



Service Request Reports Console

Select data for My Requests All Requests

Full Name

Show

2 of 2 results

Report Name	Description
My Service Request Report	Report all service requests for the specified 'Requested For', formatted for web or .pdf
My Service Request Listing	Report all service requests for the specified 'Requested For', basic format suitable for exporting

Where it says “Select data for” choose My Requests if you would like to run a report on your personal services requests, or All Requests if you’d like to run a report on your department’s service requests.

Lesson 2

Report Data Options



Users may report on a variety of request data using the 'Show' drop-down box. There are currently six options available, which are defined on the next page.

Lesson 2

Report Data Options

All	Requests with all status values except 'Closed' and 'In Cart'
Open and draft requests	Requests with all status values except 'Completed', 'Closed', and 'In Cart'
Request needing attention	Requests with 'Needs Attention' flag that are not 'In Cart'
Recently closed requests	Requests closed within the last (7) days that are not 'In Cart'
Requests closed since last login	Requests closed since current user last accessed Request Entry that are not 'In Cart'
Closed requests	Requests with status of Completed, Rejected, Cancelled, or Closed

Lesson 3

Report Options

Service Request Reports Console

Select data for My Requests All Requests

Show

Full Name

Organization

Department

Report Name	Description
My Department's Service Request Report	Report all service requests for the specified 'Requested For' department, formatted for web or .pdf
My Department's Service Request Listing	Report all service requests for the specified 'Requested For' department, basic format suitable for exporting

Run Close

There are (4) reports currently available, and only those applicable to the specified 'Select data for' option are visible in the report table. Select the report you would like to use, then press the Run button.

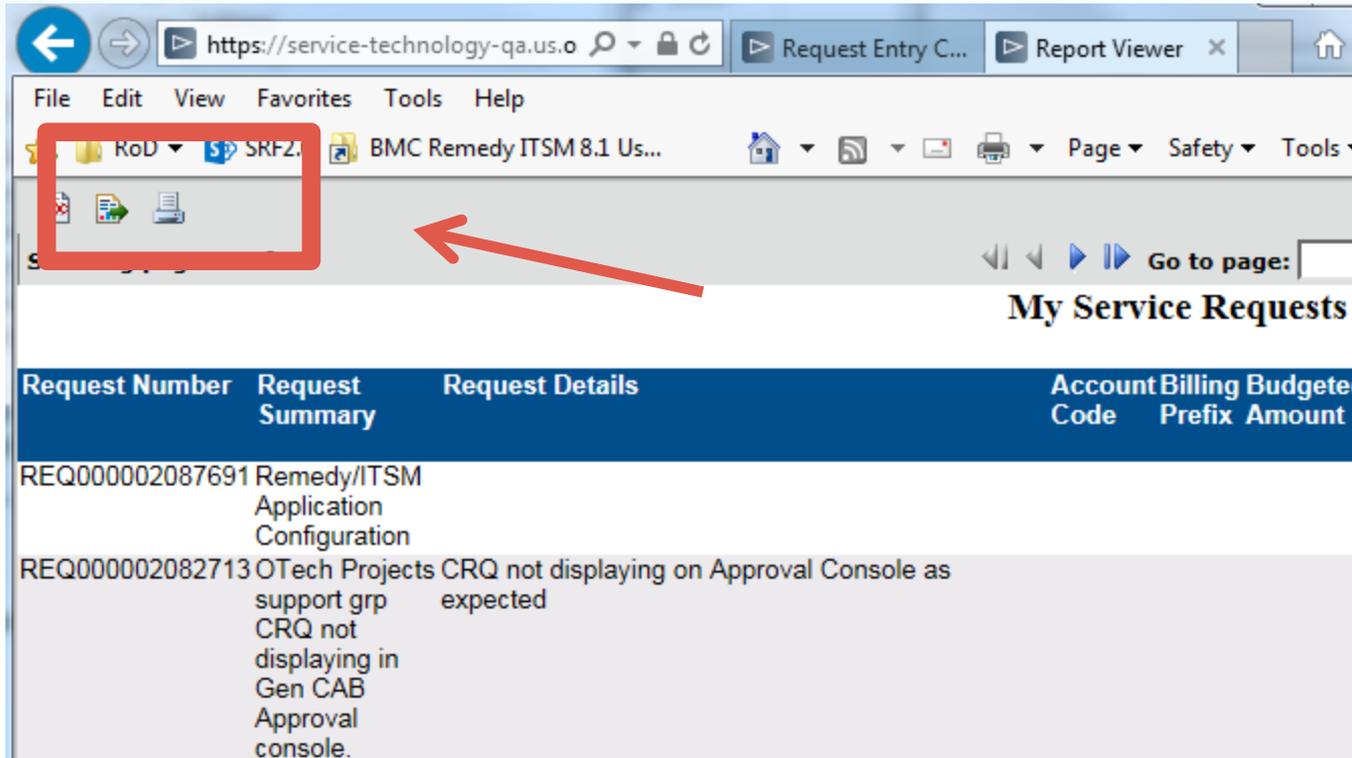
Lesson 3

Report Options

Select data for	Report Name	Description
My Requests	My Service Request Listing	Report all service requests for the specified 'Requested For', basic format suitable for exporting
My Requests	My Service Request Report	Report all service requests for the specified 'Requested For', formatted for web or .pdf
All Requests	My Department's Service Request Listing	Report all service requests for the specified 'Requested For' department, basic format suitable for exporting
All Requests	My Department's Service Request Report	Report all service requests for the specified 'Requested For' department, formatted for web or .pdf

Lesson 4

Output Options



The screenshot shows a web browser window with the URL <https://service-technology-qa.us.o>. The browser's address bar shows the page title "Request Entry C..." and "Report Viewer". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The browser's toolbar includes "RoD", "SRFZ", "BMC Remedy ITSM 8.1 Us...", "Home", "RSS", "Email", "Print", "Page", "Safety", and "Tools". A red box highlights the "Print" and "Export" buttons in the upper left corner of the report viewer interface. A red arrow points to these buttons. The report viewer displays the title "My Service Requests" and a table of service requests.

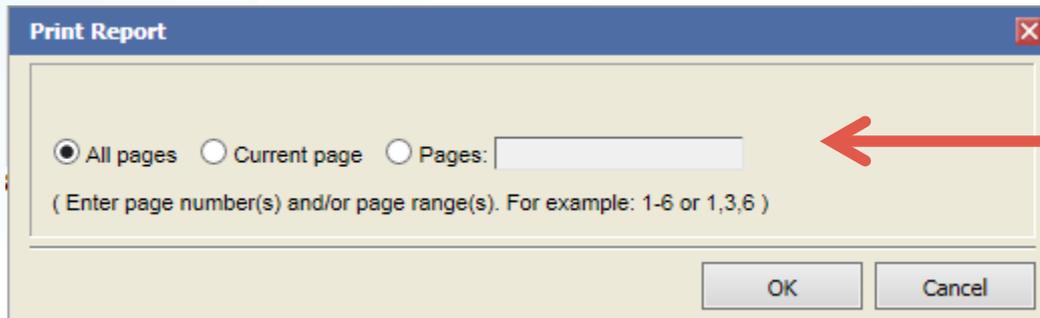
Request Number	Request Summary	Request Details	Account Billing Code	Budget Prefix	Amount
REQ000002087691	Remedy/ITSM Application Configuration				
REQ000002082713	OTech Projects CRQ not displaying in Gen CAB Approval console.	support grp expected			

Once in the Report Viewer, users may print or export the data shown using the control buttons on the upper left.

Lesson 4

Output Options

Print



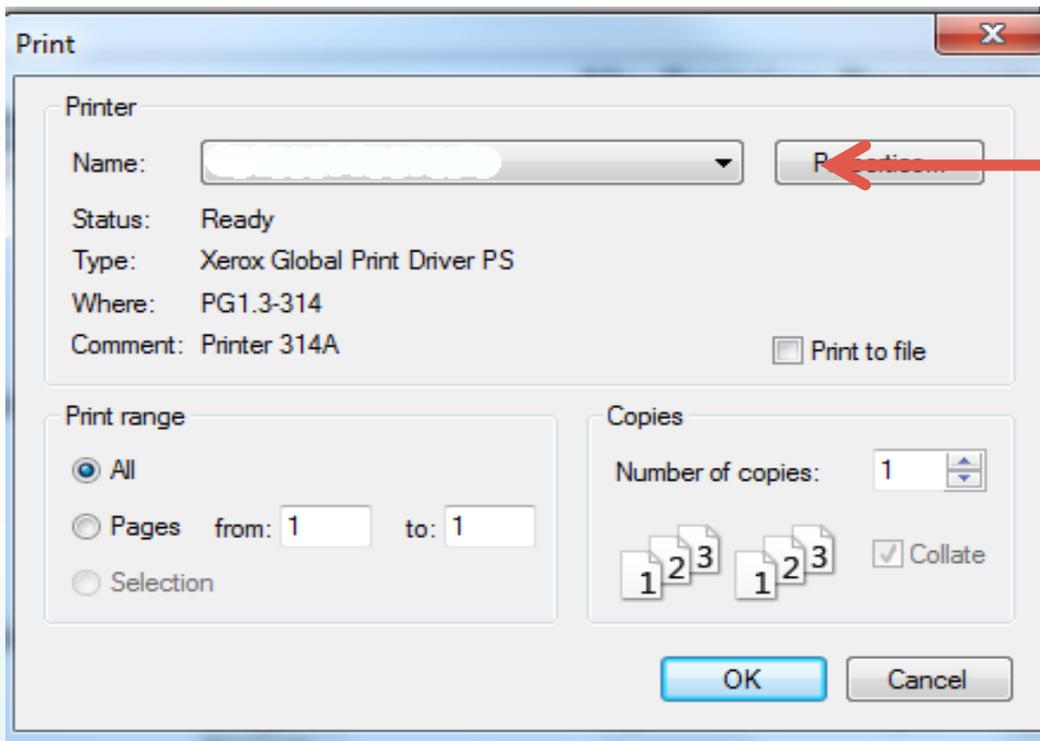
Print Report [X]

All pages Current page Pages:

(Enter page number(s) and/or page range(s). For example: 1-6 or 1,3,6)

OK Cancel

Users can first specify the pages to be printed.



Print [X]

Printer

Name:

Status: Ready

Type: Xerox Global Print Driver PS

Where: PG1.3-314

Comment: Printer 314A Print to file

Print range

All

Pages from: to:

Selection

Copies

Number of copies:

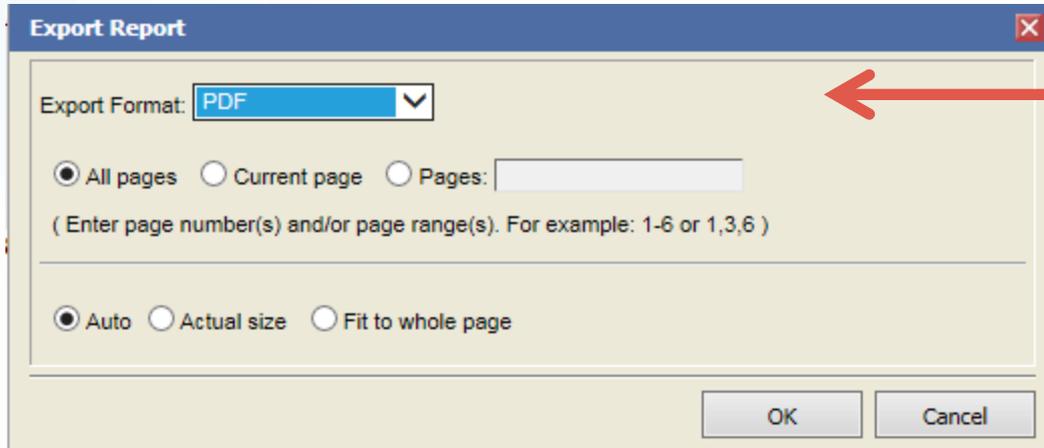
Collate

OK Cancel

Next, choose the name of the printer where the output will be directed to.

Lesson 4

Output Options

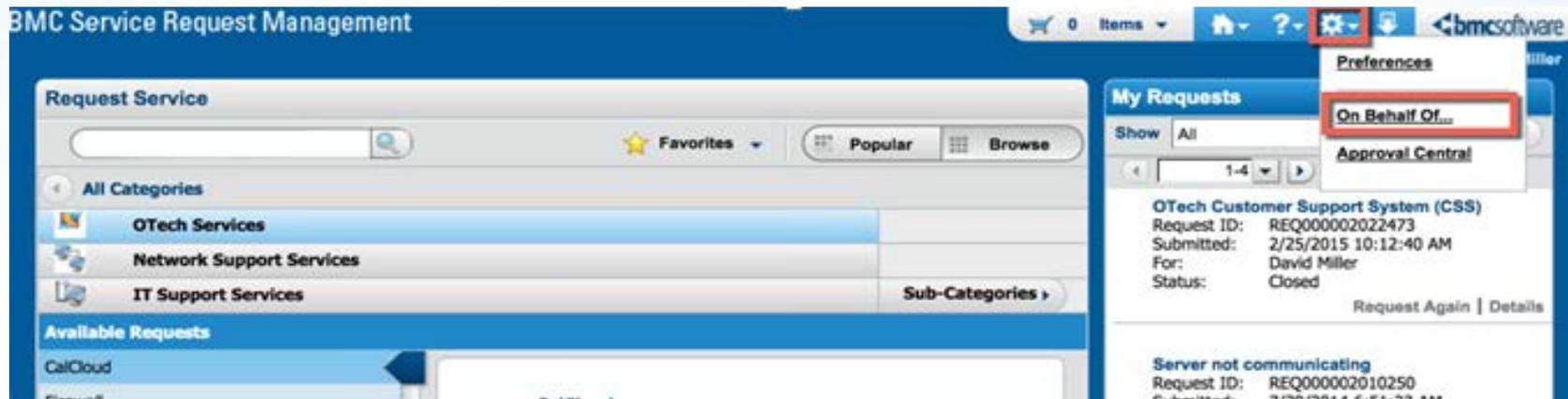


Export

Users can specify the export format they would like. Currently the options available are PDF and Excel. Best results are achieved when using the output option that corresponds with the appropriate report.

Lesson 5

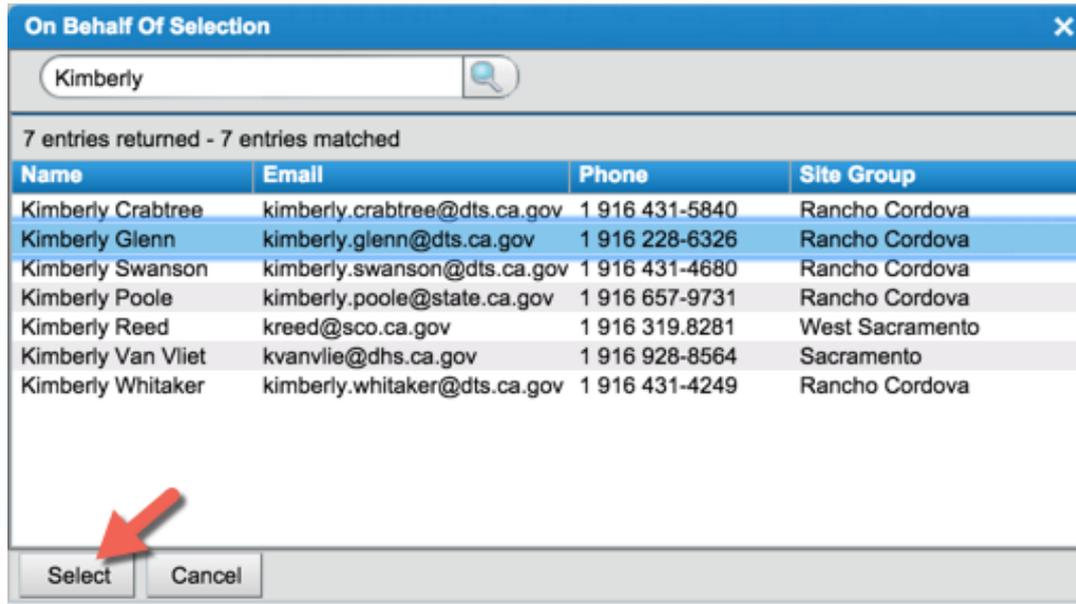
Reporting using 'On Behalf Of'



To run a report on behalf of another employee with your department, click the *Settings* (gear) icon located at the top of the SRF Application Console Home page, then select *On Behalf Of...*

Lesson 5

Reporting using 'On Behalf Of'



On Behalf Of Selection

Kimberly

7 entries returned - 7 entries matched

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

Select Cancel

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

Lesson 5

Reporting using 'On Behalf Of'



Service Request Reports Console

Select data for My Requests All Requests

Show

Full Name

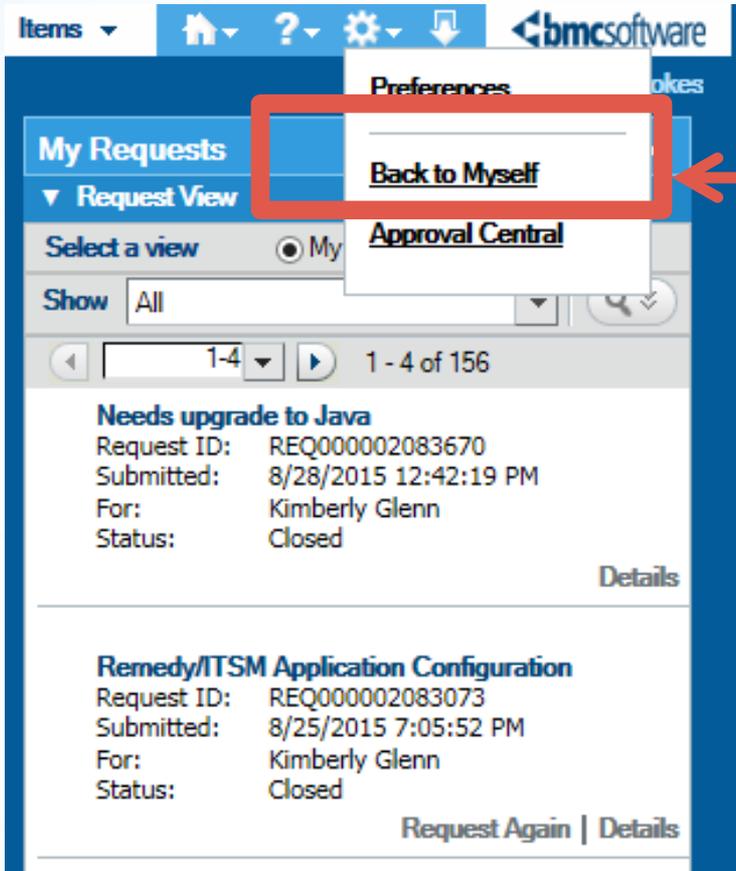
2 of 2 results

Report Name	Description
My Service Request Report	Report all service requests for the specified 'Requested For', formatted for web or .pdf
My Service Request Listing	Report all service requests for the specified 'Requested For', basic format suitable for exporting

Once you return to the Service Request Reports Console, notice how the system now displays the other person's name in the top right. Any reports you run will now display data for this specific person until you set yourself back to being the user.

Lesson 5

Reporting using 'On Behalf Of'



The screenshot shows the BMC Software SRF Application Console Home page. At the top, there is a navigation bar with icons for home, help, settings, and download. The 'Settings' gear icon is highlighted with a red box, and a dropdown menu is open, showing the option 'Back to Myself' also highlighted with a red box and an arrow pointing to it. Below the navigation bar, there is a 'My Requests' section with a 'Request View' dropdown and a 'Select a view' dropdown. The main content area displays two request cards: 'Needs upgrade to Java' and 'Remedy/ITSM Application Configuration'. Each card shows the Request ID, Submitted date, For (Kimberly Glenn), and Status (Closed). The 'Needs upgrade to Java' card has a 'Details' link, and the 'Remedy/ITSM Application Configuration' card has 'Request Again' and 'Details' links.

To set the system back to yourself, click the *Settings* (gear) icon located at the top of the SRF Application Console Home page, then select *Back to Myself*.