



California
DEPARTMENT OF TECHNOLOGY
Office of Technology Services

SRM How to Manage Your Service Requests

Module Objectives

- **Lesson 1:** Service Request Status Definitions
- **Lesson 2:** How to Track Your Service Requests
- **Lesson 3:** How to Add Additional Information to your Service Requests
- **Lesson 4:** How to Cancel a Service Request
- **Lesson 5:** How to Handle a Rejected SR

Lesson 1

Service Request Status Definitions



Draft	The request has been created but has not been submitted to CDT.
In Review	The request has been submitted and is being reviewed.
Pending	Work on the request has been temporarily suspended. The approver must specify a reason why the status is pending.
Submitted	There is a momentary lag in the system where the service request will sit in Submitted status until the workflow to send it to the approvers is kicked off.
Waiting Approval	The request has been submitted and is pending approval.
Initiated	A request goes to Initiated when all of the approvers have approved it. Work is being planned for implementation; targeting dates, and estimating costs. If the request requires several tasks, SRM Support will create and schedule these tasks.

Lesson 1

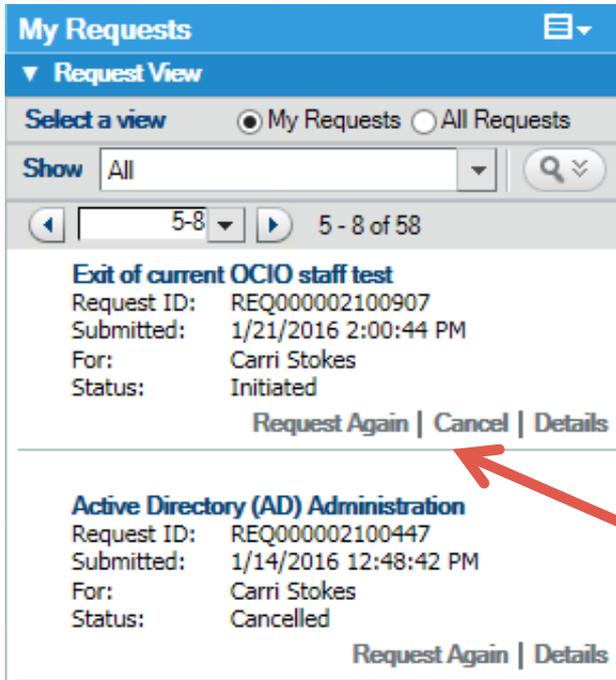
Service Request Status Definitions



In Progress	Service providers working on the request log their progress as they implement the request and perform associated tasks
Completed	The request is updated to Completed when the Support Group(s) fulfills the request. Users can update a service request in Completed status for 15 days, which will create a work order.
Rejected	The approver rejects the service request.
Cancelled	The request is cancelled by the requester.
Closed	The request automatically closes after 15 days in Completed status.

Lesson 2

How to Track Your Service Requests



My Requests

▼ Request View

Select a view My Requests All Requests

Show All

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Exit of current OCIO staff test
Request ID: REQ000002100907
Submitted: 1/21/2016 2:00:44 PM
For: Carri Stokes
Status: Initiated
Request Again | Cancel | Details

Active Directory (AD) Administration
Request ID: REQ000002100447
Submitted: 1/14/2016 12:48:42 PM
For: Carri Stokes
Status: Cancelled
Request Again | Details

Some of the request details, such as the Request ID, submission date, time, and current status, are displayed in the *My Requests* section on the SRM Application Console.

To access a more detailed view of the status of a request, click the record name or click *Details*.

Lesson 2

How to Track Your Service Requests

Request Details

Details Additional Details Process View

Draft Waiting Approval Initiated

General Information

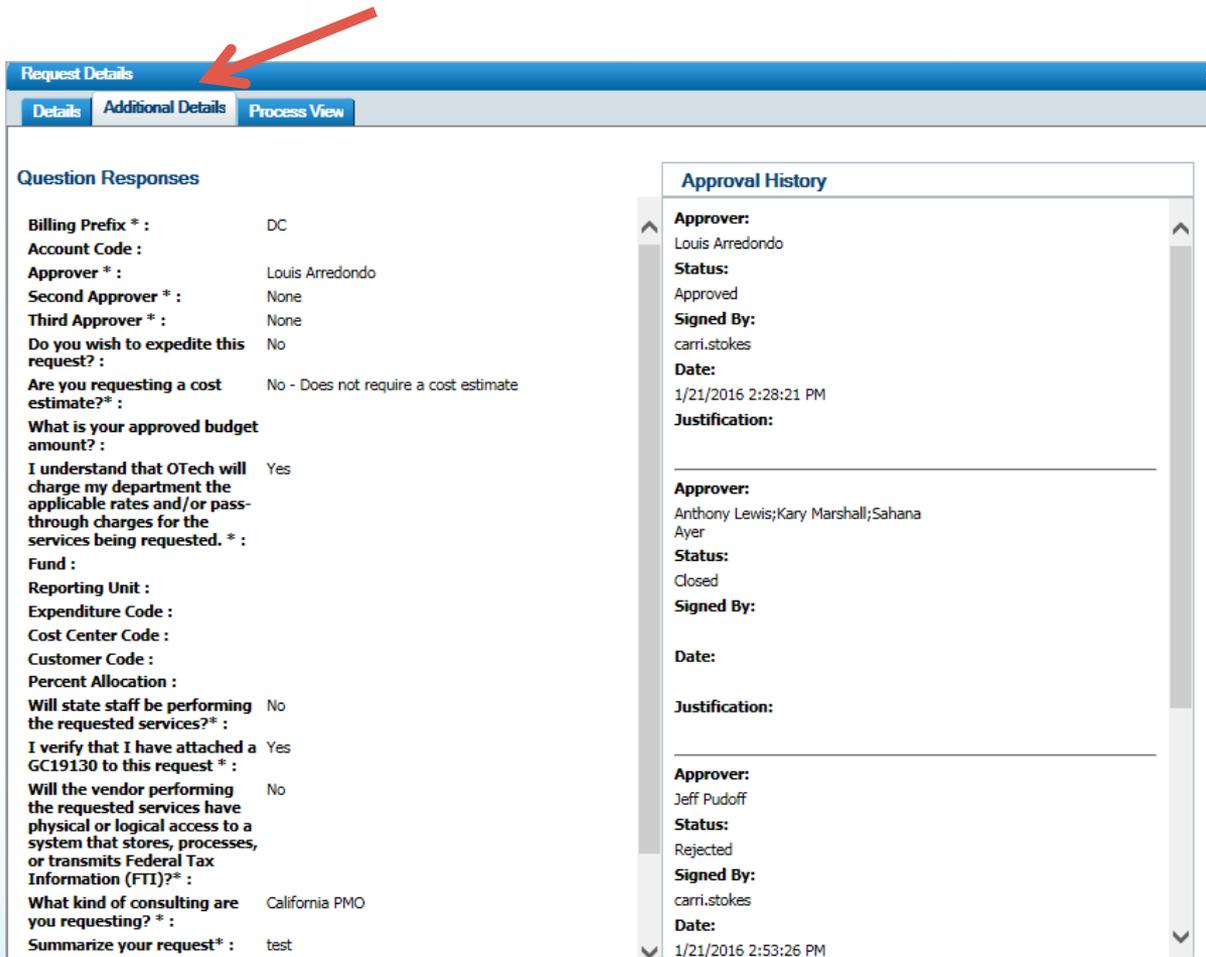
Request Status:	Rejected
Title:	Professional Services – Internal (new) test
Submit Date:	1/21/2016 2:17:06 PM
Required Completion:	
Requested By:	Carri Stokes
Requested For:	Carri Stokes
Company:	OCIO ITSM Services
Phone:	1 916 431-4052
Email:	carri.stokes@state.ca.gov

The *Request Details* dialog box is now displayed. Under the Details tab you will find the current status of your request.

Lesson 2

How to Track Your Service Requests

Click on the Additional Details tab to see the approval history.



Request Details

Details **Additional Details** Process View

Question Responses

Billing Prefix * : DC

Account Code :

Approver * : Louis Arredondo

Second Approver * : None

Third Approver * : None

Do you wish to expedite this request? : No

Are you requesting a cost estimate?* : No - Does not require a cost estimate

What is your approved budget amount? :

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

Fund :

Reporting Unit :

Expenditure Code :

Cost Center Code :

Customer Code :

Percent Allocation :

Will state staff be performing the requested services?* No

I verify that I have attached a GC19130 to this request * : Yes

Will the vendor performing the requested services have physical or logical access to a system that stores, processes, or transmits Federal Tax Information (FTI)?* : No

What kind of consulting are you requesting? * : California PMO

Summarize your request* : test

Approval History

Approver: Louis Arredondo

Status: Approved

Signed By: carri.stokes

Date: 1/21/2016 2:28:21 PM

Justification:

Approver: Anthony Lewis;Kary Marshall;Sahana Ayer

Status: Closed

Signed By:

Date:

Justification:

Approver: Jeff Pudoff

Status: Rejected

Signed By: carri.stokes

Date: 1/21/2016 2:53:26 PM

Lesson 3

How to Add Additional Information to Your Service Request

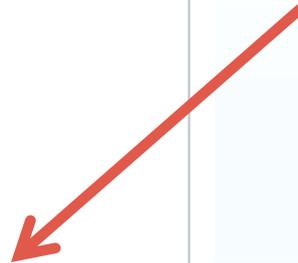


Activity Log

2/4/2016 12:47:11 PM ; Carri Stokes (carri.stokes)
Please see additional details in the attachment regarding this request.
 [My Requests.docx](#)

You can type your entry in the text area beneath the Activity Log and click the *Add* button to add it to the log. You can also attach additional files to the service request using the *Folder* icon.

Once you click the Add button, your notes appear under *Activity Log* as shown in the screenshot to the left.

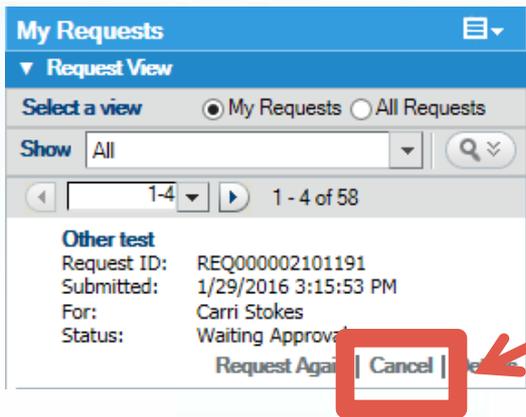


Notes : Please see additional details in the attachment regarding this request.

Attachment:  

Lesson 4

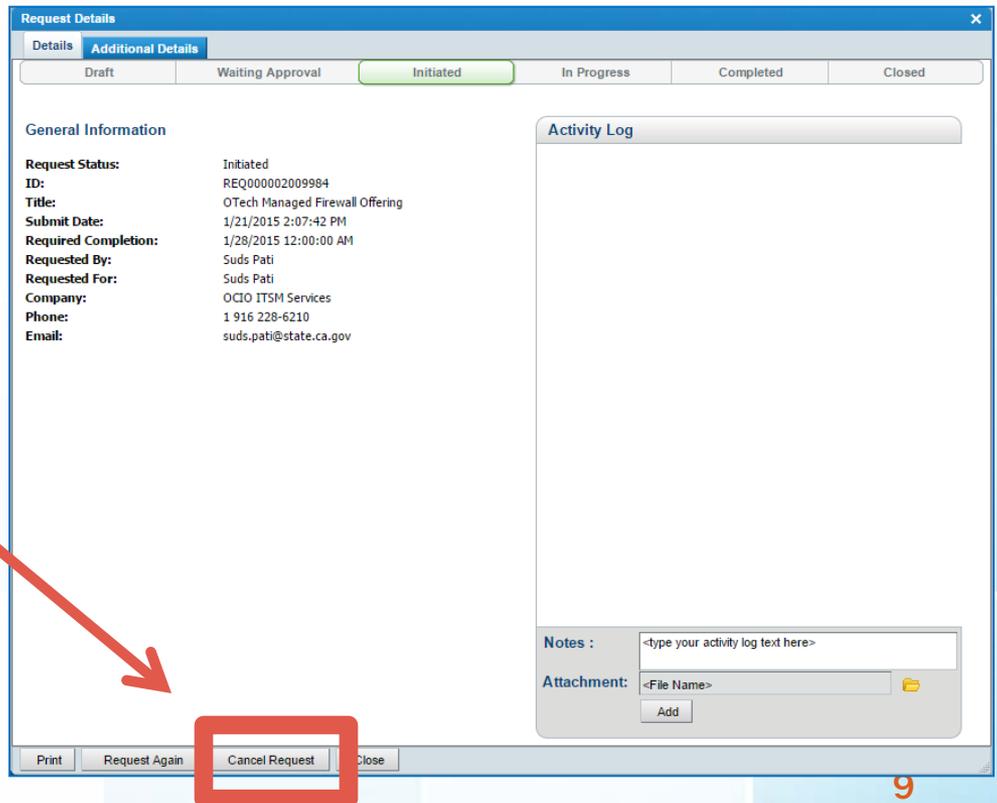
How to Cancel Your Service Request



You can cancel a request directly from the *My Requests* section by clicking Cancel located below the request.

Also, you can click the request to view the details of the request and then click Cancel Request.

When you click *Cancel Request*, a Message Box appears for confirmation. Click Yes to confirm the cancellation.



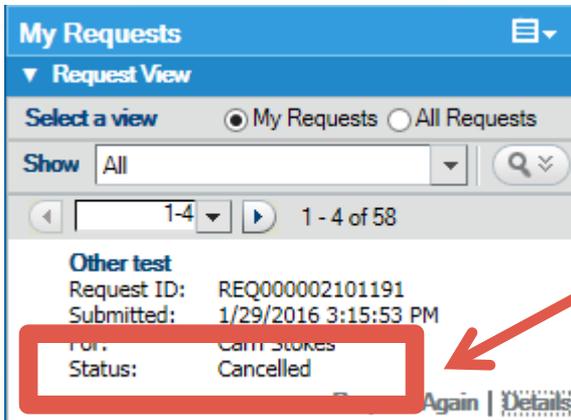
Lesson 4

How to Cancel Your Service Request

General Information

Request Status: Cancelled (By User)
ID: REQ000002101191
Title: Other test
Submit Date: 1/29/2016 3:15:53 PM
Required Completion: 2/24/2016 12:00:00 AM
Requested By: Carri Stokes
Requested For: Carri Stokes
Company: OCIO ITSM Services
Phone: 1 916 431-4052
Email: carri.stokes@state.ca.gov

The request status changes to *Cancelled* as shown on the screen.



My Requests 

▼ Request View

Select a view My Requests All Requests

Show All 

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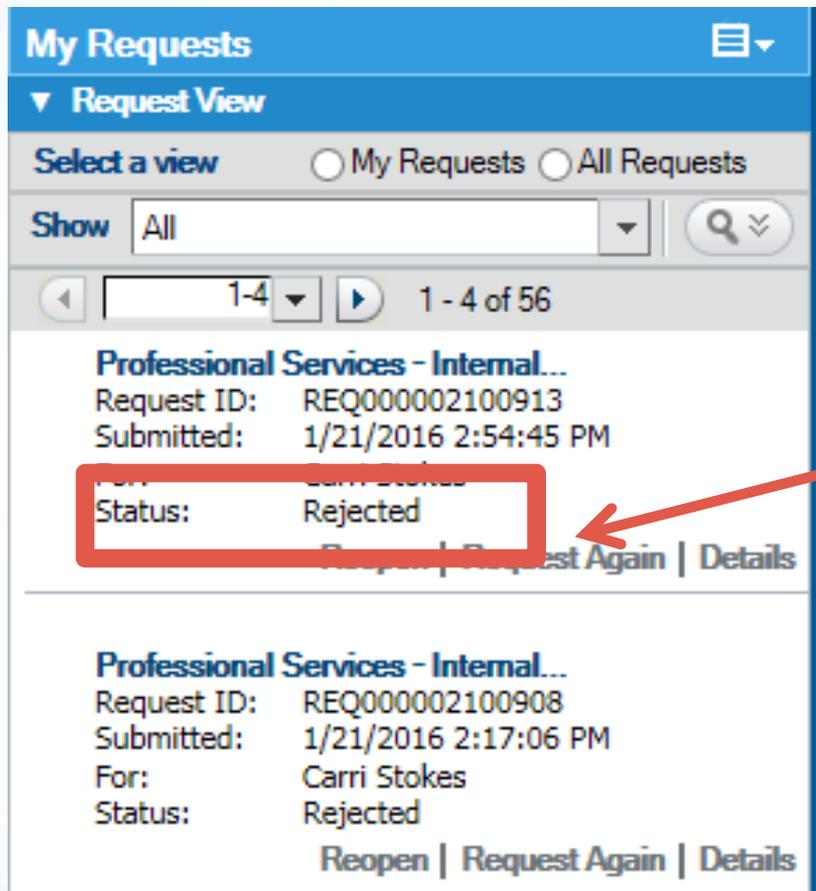
Other test
Request ID: REQ000002101191
Submitted: 1/29/2016 3:15:53 PM
For: Carri Stokes
Status: Cancelled

[Again](#) | [Details](#)

The cancelled request appears in the *My Requests* section with a status of *Cancelled*.

Lesson 5

How to Handle a Rejected SR



My Requests 

▼ **Request View**

Select a view My Requests All Requests

Show All 

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Professional Services - Internal...
Request ID: REQ000002100913
Submitted: 1/21/2016 2:54:45 PM
For: Carri Stokes
Status: Rejected
[Reopen](#) | [Request Again](#) | [Details](#)

Professional Services - Internal...
Request ID: REQ000002100908
Submitted: 1/21/2016 2:17:06 PM
For: Carri Stokes
Status: Rejected
[Reopen](#) | [Request Again](#) | [Details](#)

Once the request is approved or rejected, the status of the request will change to show the submitter the most recent action.

Lesson 5

How to Handle a Rejected SR

Request Details

Details Additional Details Process View

Question Responses

Billing Prefix * :	DC
Account Code :	
Approver * :	Louis Arredondo
Second Approver * :	None
Third Approver * :	None
Do you wish to expedite this request? :	No
Are you requesting a cost estimate?* :	No - Does not require a cost estimate
What is your approved budget amount? :	
I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested. * :	Yes

Approval History

Approver:
Louis Arredondo

Status:
Rejected

Signed By:
carri.stokes

Date:
1/21/2016 2:56:31 PM

Justification:
Insufficient information included for this request. Please fill out the form completely.

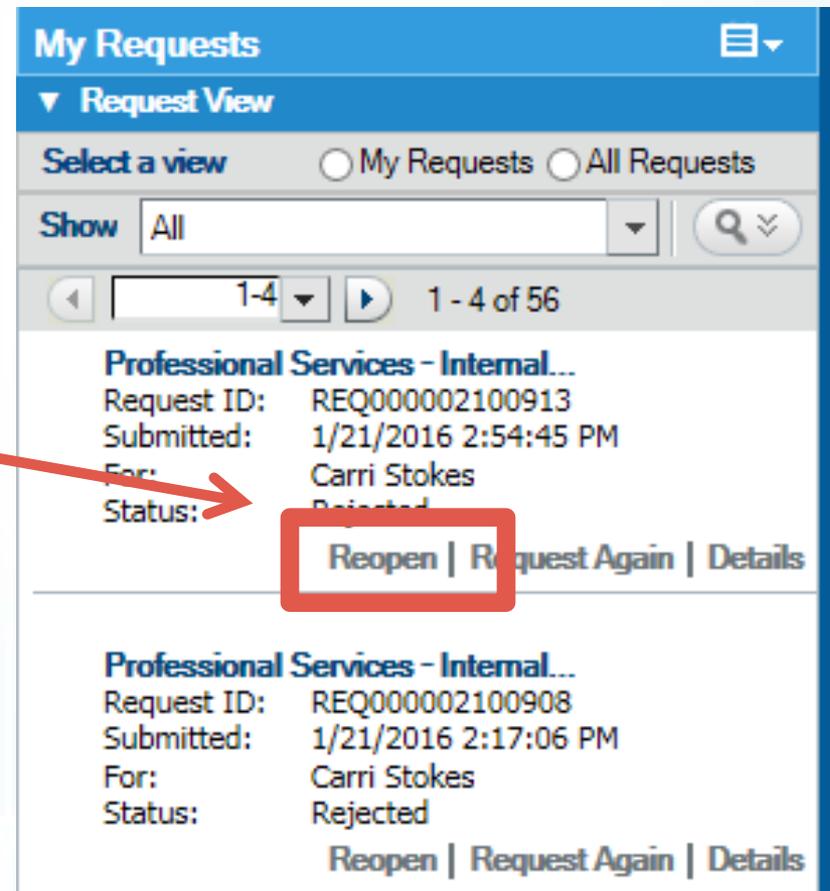


To locate the rejection justification, click on the Additional Details tab from the Request Details screen, then view the Approval History.

Lesson 5

How to Handle a Rejected SR

If the request has been rejected there will be a “Reopen” option below the status. This allows the submitter to add or attach any additional information needed and resubmit the request for approval.



My Requests 

▼ Request View

Select a view My Requests All Requests

Show All 

1-4 1 - 4 of 56

Professional Services - Internal...
Request ID: REQ000002100913
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For: Carri Stokes
Status: Rejected
Reopen | Request Again | Details

Professional Services - Internal...
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Reopen | Request Again | Details