



California
DEPARTMENT OF TECHNOLOGY
Office of Technology Services

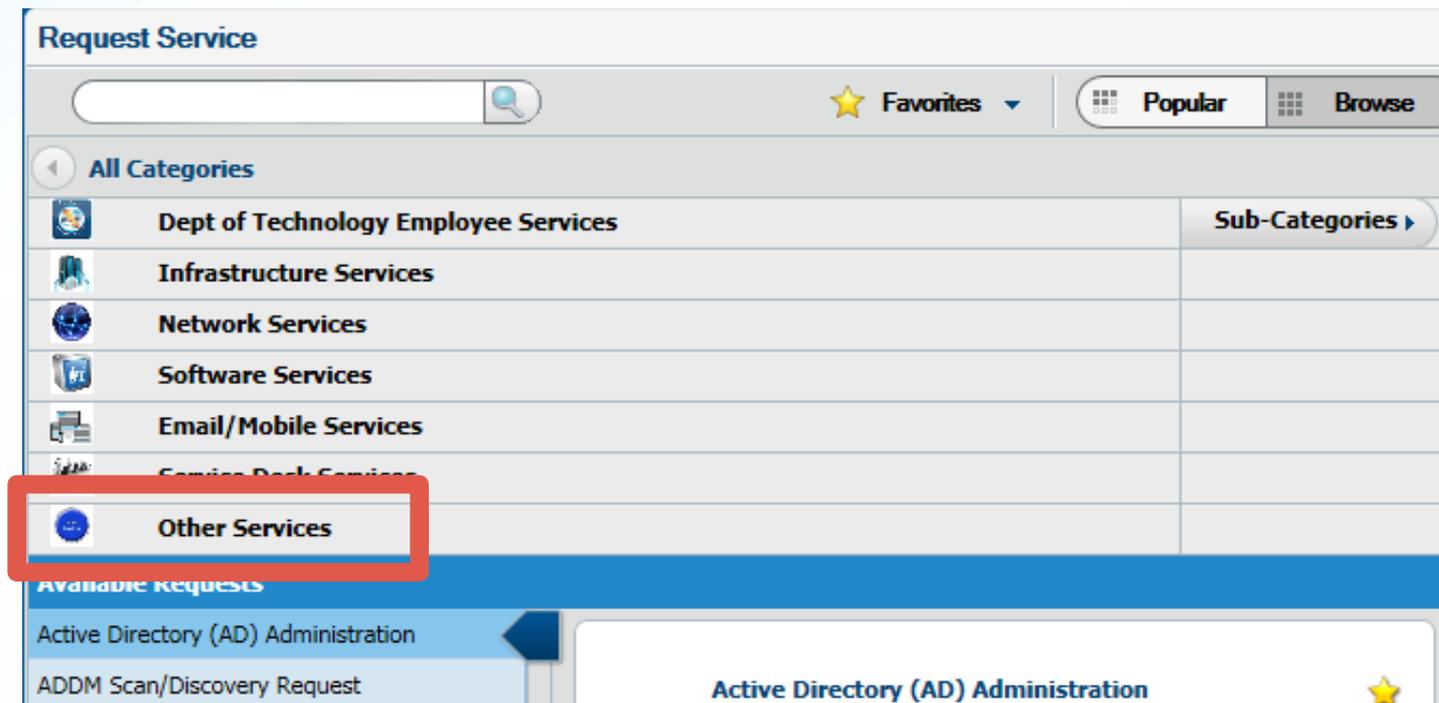
SRM How to Submit a Service Request (using “Other” SR Form)

Module Objectives

- Lesson 1: Opening a Service Request
- Lesson 2: Complete the “Other” SR form

Lesson 1

Opening a Service Request



Request Service

Search [] Favorites [] Popular [] Browse []

All Categories

	Sub-Categories ▶
 Dept of Technology Employee Services	
 Infrastructure Services	
 Network Services	
 Software Services	
 Email/Mobile Services	
 Service Desk Services	
 Other Services	

Available Requests

Active Directory (AD) Administration	Active Directory (AD) Administration 
ADDM Scan/Discovery Request	

To open a service request, browse to the service request form you need by either using the Search feature or manually looking through the categories. For this example we'll use the "Other" service request form.

Lesson 1

Opening a Service Request

Request Service

Search [] [] Favorites [] Popular [] Browse []

All Categories

 Dept of Technology Employee Services	Sub-Categories ▶
 Infrastructure Services	
 Network Services	
 Software Services	
 Email/Mobile Services	
 Service Desk Services	
 Other Services	

Available Requests

Miscellaneous Non-Billable Request

Other

Other

Description:
Use for billable and non-billable requests that require management approval. California Department of Technology employees use the Procurement SRD for purchases. Note: Select this option only when there is not a specific request type elsewhere in the Service Request menu.

 Add to Favorites  Request Now  AddTo Cart

Users can create a Service Request using “Other” when the service requests in the system do not fit their needs. Please note that “other” is not a searchable term in SRM and you will have to locate this form from the Categories section.

Lesson 1

Opening a Service Request

Request Service

Search: [] []

★ Favorites [v] [] Popular [] Browse

All Categories

Dept of Technology Employee Services	Sub-Categories ▶
Infrastructure Services	
Network Services	
Software Services	
Email/Mobile Services	
Service Desk Services	
Other Services	

Available Requests

Other

Other

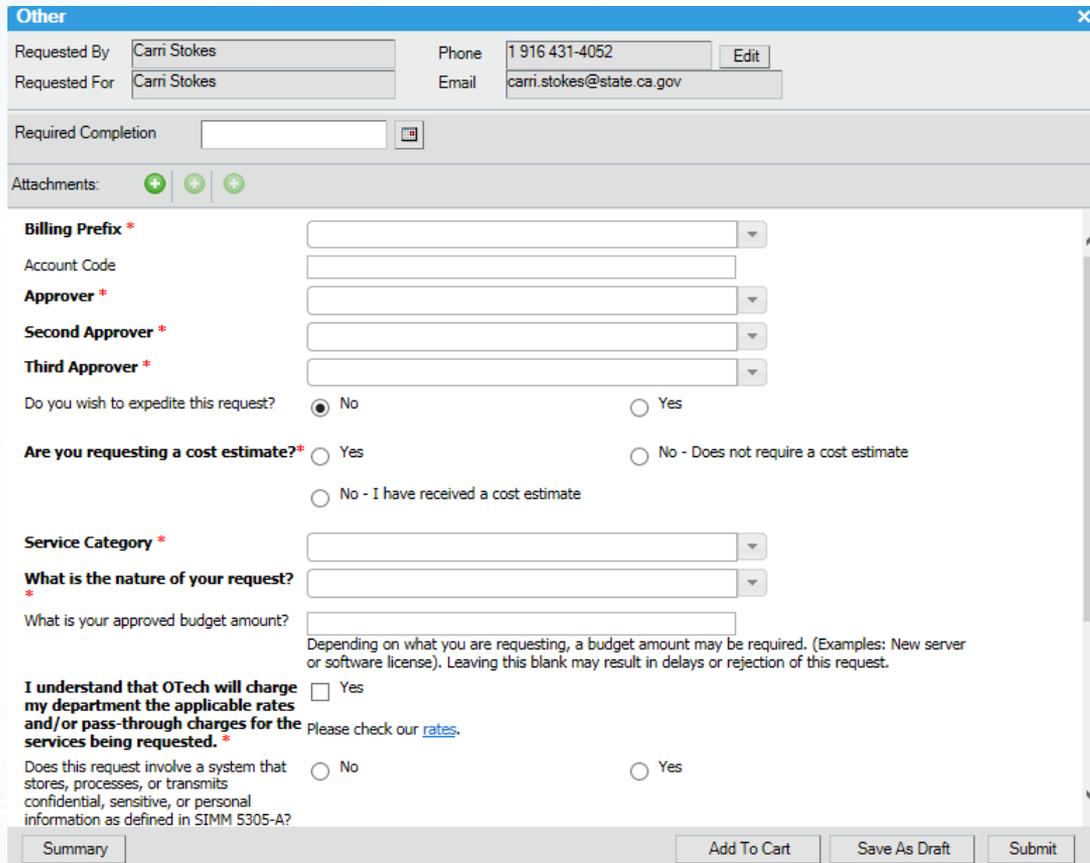
Description:
Use for billable and non-billable requests that require management approval. California Department of Technology employees use the Procurement SRD for purchases. Note: Select this option only when there is not a specific request type elsewhere in the Service Request menu.

Add to Favorites [] Request Now [] AddTo Cart []

After clicking on the category “*Other Services*”, choose “*Other*” from the Available Requests section, then choose Request Now.

Lesson 2

Complete the “Other” SRD Form



The screenshot shows a web form titled "Other" with a close button (X) in the top right corner. The form contains the following fields and sections:

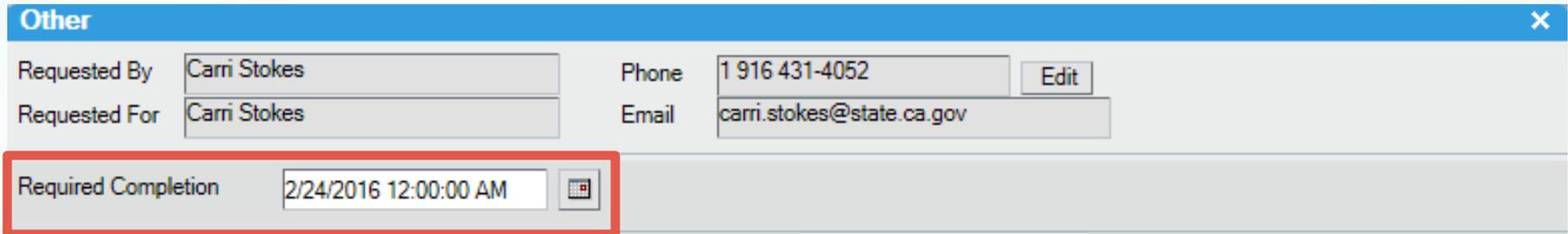
- Requested By:** Carri Stokes
- Requested For:** Carri Stokes
- Phone:** 1 916 431-4052 (with an "Edit" button)
- Email:** carri.stokes@state.ca.gov
- Required Completion:** (empty field with a calendar icon)
- Attachments:** (three green plus icons)
- Billing Prefix *** (dropdown menu)
- Account Code** (text input)
- Approver *** (dropdown menu)
- Second Approver *** (dropdown menu)
- Third Approver *** (dropdown menu)
- Do you wish to expedite this request?** (radio buttons for No and Yes)
- Are you requesting a cost estimate?*** (radio buttons for Yes, No - Does not require a cost estimate, and No - I have received a cost estimate)
- Service Category *** (dropdown menu)
- What is the nature of your request? *** (dropdown menu)
- What is your approved budget amount? *** (text input)
Depending on what you are requesting, a budget amount may be required. (Examples: New server or software license). Leaving this blank may result in delays or rejection of this request.
- I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested. *** (checkbox for Yes, with a link to "rates")
- Does this request involve a system that stores, processes, or transmits confidential, sensitive, or personal information as defined in SIMM 5305-A?** (radio buttons for No and Yes)

At the bottom of the form, there are three buttons: "Summary", "Add To Cart", "Save As Draft", and "Submit".

Upon clicking *Request Now*, the SRM application opens the “Other” service request form. Only the bolded questions are required. We’ll break down this form into more detail over the next few slides.

Lesson 2

Complete the “Other” SRD Form



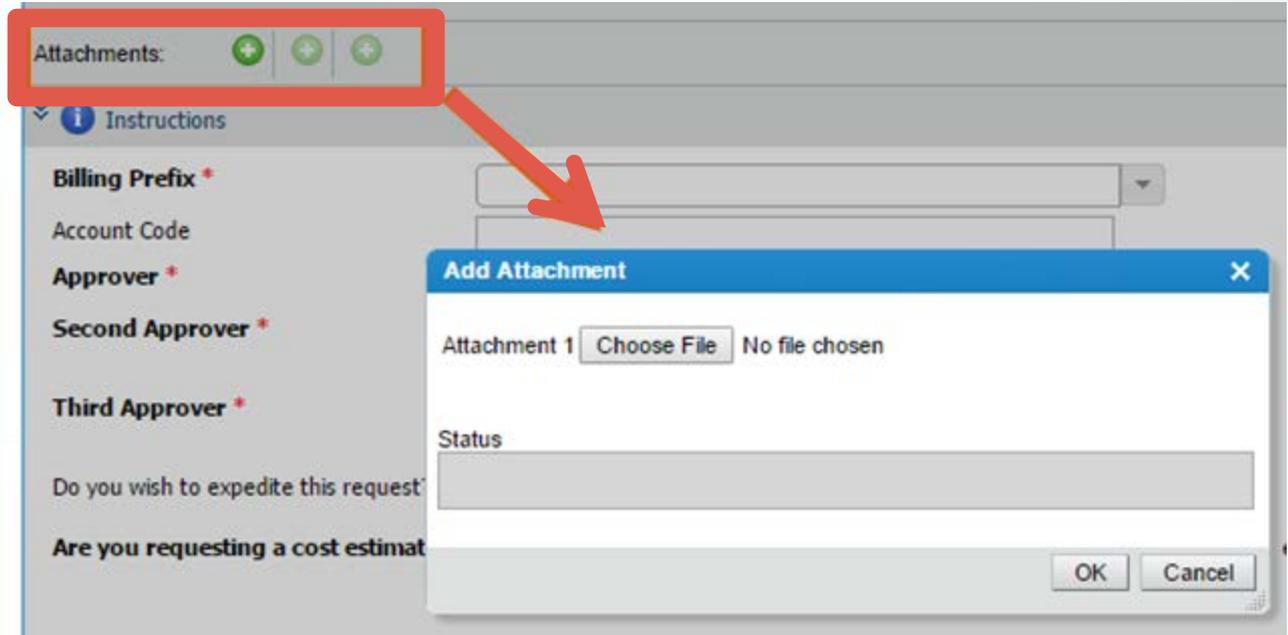
Other		✕	
Requested By	Carri Stokes	Phone	1 916 431-4052 <input type="button" value="Edit"/>
Requested For	Carri Stokes	Email	carri.stokes@state.ca.gov
Required Completion	2/24/2016 12:00:00 AM 		

The information up top will automatically populate with your information. This information could be slightly different if you're requesting a service on behalf of another person. Use the *Edit* button to alter any of the information shown. Click on the calendar icon next to the *Required Completion* field to select a date from a pop-up calendar. This is the deadline by which you will need your request to be fulfilled.

Lesson 2

Complete the “Other” SRD Form

To attach a file to your service request click the (+) sign. You will be prompted with an *Add Attachment* popup menu to select a file from your desktop. This is a useful feature as it allows you to add additional details to the service request in form of attachments.

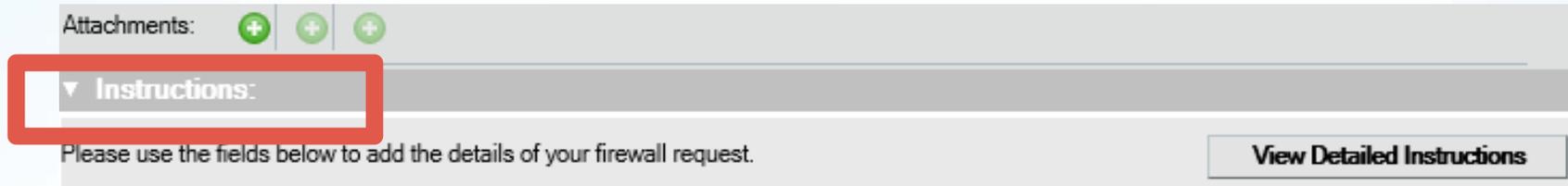


The screenshot shows a web form for a Service Request (SRD). At the top, there is an 'Attachments:' section with three green plus signs. A red box highlights this section, and a red arrow points to the 'Add Attachment' popup menu. The popup menu has a blue header and contains the following fields: 'Attachment 1' with a 'Choose File' button and 'No file chosen' text; a 'Status' text area; and 'OK' and 'Cancel' buttons at the bottom. The background form includes fields for 'Billing Prefix', 'Account Code', 'Approver', 'Second Approver', and 'Third Approver', along with checkboxes for 'Do you wish to expedite this request?' and 'Are you requesting a cost estimate?'.

Note: You can add up to 3 attachments when you are first submitting your service request. You can add additional attachments once it has been submitted.

Lesson 2

Complete the “Other” SRD Form

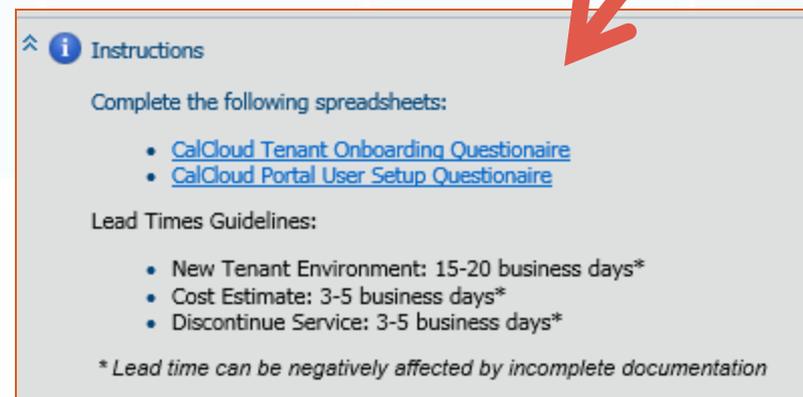


Attachments:   

▼ Instructions:

Please use the fields below to add the details of your firewall request. [View Detailed Instructions](#)

Although not available in the “Other” service request form, some forms have instructions built into the form as you can see using the Firewall form above. The instructions section inside a form will either provide more detailed instructions on how to complete the service request, or link to additional attachments that you may to include.



Instructions

Complete the following spreadsheets:

- [CalCloud Tenant Onboarding Questionnaire](#)
- [CalCloud Portal User Setup Questionnaire](#)

Lead Times Guidelines:

- New Tenant Environment: 15-20 business days*
- Cost Estimate: 3-5 business days*
- Discontinue Service: 3-5 business days*

** Lead time can be negatively affected by incomplete documentation*

Lesson 2

Complete the “Other” SRD Form

Billing Prefix *	<input type="text" value="DC"/>
Account Code	<input type="text"/>

The Billing Prefix drop down box options will display only the prefixes that are setup for your department. The Account Code box is a free form field that you can complete but is not required.

Lesson 2

Complete the “Other” SRD Form

Approver *	Jack Sturges	▼
Second Approver *	None	▼
Third Approver *	None	▼

When completing the service request, use the drop down list to locate your management or directly type their name in the field, with your immediate supervisor or manager as the first approver, and the next level of management as the second and third. If the request only requires one or two approvers, you can select or type “None” in place of a specific member of management, as you can see in the example on the screen.

Lesson 2

Complete the “Other” SRD Form

Do you wish to expedite this request? No Yes

Expedite Fee

If you choose “Yes” for expediting the request, the system will display the cost for expediting a request directly below.

Lesson 2

Complete the “Other” SRD Form

Are you requesting a cost estimate?* Yes No - Does not require a cost estimate
 No - I have received a cost estimate

Cost Estimate Amount*

You have three different options for cost estimates. Choose Yes if you would like CDT to provide you with a cost estimate. Choose the first “No” if your request does not require a cost estimate, and click the second “No” if you have already received a cost estimate. If you choose the second “No” option, the “Cost Estimate Amount” box will appear where you will populate the amount you have been quoted.

Lesson 2

Complete the “Other” SRD Form

Service Category *

Dept of Technology Employee Services

Currently the following Service Categories are available:

- Dept of Technology Employee Services
- Infrastructure Services
- Network Services
- Software Services
- Email/Mobile Services
- Service Desk Services
- Other Services

Note: The Service Categories available to you can vary depending on which department you work for.

Lesson 2

Complete the “Other” SRD Form

What is the nature of your request?

*

You have four different options to choose from in regards to your request:

- New Service
- Modify Service
- Discontinue Service
- Other

Lesson 2

Complete the “Other” SRD Form

What is your approved budget amount?

Depending on what you are requesting, a budget amount may be required. (Examples: New server or software license). Leaving this blank may result in delays or rejection of this request.

Depending on what you are requesting, a budget amount may be required. Examples would be new servers or software licenses. Leaving this blank may result in delays or rejection of this request.

Lesson 2

Complete the “Other” SRD Form

I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested. * Yes Please check our [rates](#).

CDT will charge your department the applicable rates and/or pass through charges for the services being requested. Click yes to acknowledge this statement. You can also click on the Rates link to view our current list of rates on the CDT website.

→ Rates

The Office of Technology Services (OTech) is an economical total solution provider of information technology. Customers are charged for resources required to process their jobs using uniformly established rates that are reviewed regularly to ensure that costs are equitable. In addition, we are able to take advantage of economies of scale and pass these savings to its customers.

FY 2015/16 & 2016/17

- [Customer Memo \(pdf\)](#)
- [OTech Rate Schedule - January 2016 \(pdf\)](#)
 - [Appendix A - Value-Added Network Services Via AAMVAnet \(pdf\)](#)
 - [Appendix B - Network Services \(pdf\)](#)
 - [Appendix C - California Government Enterprise Network \(CGEN\) Rates \(pdf\)](#)

Lesson 2

Complete the “Other” SRD Form

Does this request involve a system that stores, processes, or transmits confidential, sensitive, or personal information as defined in SIMM 5305-A? No Yes

The form asks whether your request involves a system that stores, processes, or transmits confidential, sensitive, or personal information as defined in SIMM 5305-A. If you choose yes, another question will appear asking you to explain what type of information is involved. Select all that apply.

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

<input type="checkbox"/> Federal Tax Information	<input type="checkbox"/> Payment Card Information
<input type="checkbox"/> Personally Identifiable Information	<input type="checkbox"/> Criminal Justice Information
<input type="checkbox"/> Information subject to the Family Education Rights and Privacy Act	<input type="checkbox"/> Information subject to other Regularity Requirements

Lesson 2

Complete the “Other” SRD Form

Summarize your request*	<input type="text"/>
Request details*	<input type="text"/>

Use the *Summary* field to give your request a title.

Use the *Request Details* field to provide additional information and clarification about your request.

Lesson 2

Complete the “Other” SRD Form



At any time while you are filling out the form you can click on “Save as Draft” if you would like to finish filling it out later. After you have filled out the form, click *Submit* to submit the service request for approval. You can also view the details of your request by clicking the *Summary* button. We’ll cover these buttons in more detail on the next few slides.

Note: Although it is fully functional, we do not recommend using the Add to Cart function at this time.

Lesson 2

Complete the "Other" SRD Form

Other x

Summary

[Print](#)

Request Name: Other
Required Completion: 2/24/2016 12:00:00 AM
Expected Completion: 1/30/2016 1:22:52 PM
Requested By: Carri Stokes
Requested For: Carri Stokes
Phone: 1 916 431-4052
Email: carri.stokes@state.ca.gov

Provided Information

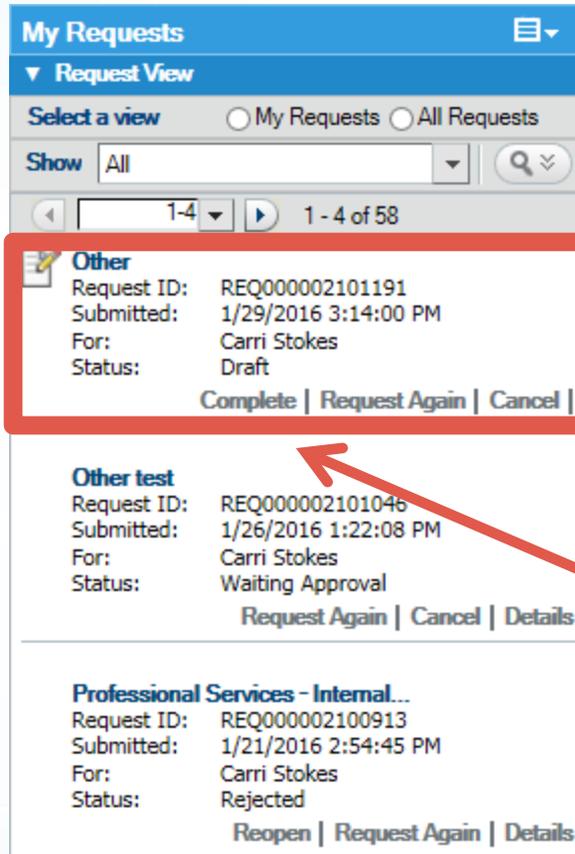
Billing Prefix * : DC
Account Code :
Approver * : Jack Sturges
Second Approver * : None
Third Approver * : None
Do you wish to expedite this request? : Yes
Expedite Fee : \$515
Are you requesting a cost estimate?* : No - Does not require a cost estimate
Service Category * : Network Services
What is the nature of your request? * : Modify Service
What is your approved budget amount? : 500
I understand that OTech will charge my department the applicable rates and/or pass-through charges for the services being requested. * : Yes
Does this request involve a system that stores, processes, or transmits confidential, sensitive, or personal information as defined in SIMM 5305-A? : No
Summarize your request* : test
Request details* : test

[Back](#)[Add To Cart](#)[Save As Draft](#)[Submit](#)

If you chose *Summary*, this pop up box will appear with a summary of your request. Click on the **Back** button to return to the previous screen.

Lesson 2

Complete the “Other” SRD Form



My Requests 

▼ Request View

Select a view My Requests All Requests

Show All 

1-4 1 - 4 of 58

Other
Request ID: REQ000002101191
Submitted: 1/29/2016 3:14:00 PM
For: Carri Stokes
Status: Draft
[Complete](#) | [Request Again](#) | [Cancel](#) |

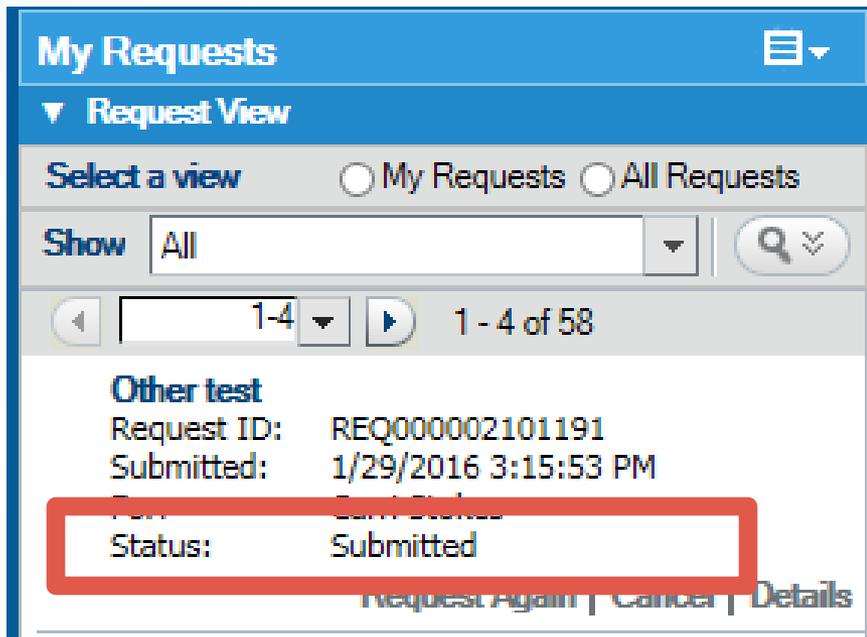
Other test
Request ID: REQ000002101046
Submitted: 1/26/2016 1:22:08 PM
For: Carri Stokes
Status: Waiting Approval
[Request Again](#) | [Cancel](#) | [Details](#)

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

Draft requests can be found in the My Requests section in SRM. Clicking on *Complete* returns you back to the form to finish submitting your service request.

Lesson 2

Complete the “Other” SRD Form



My Requests 

▼ **Request View**

Select a view My Requests All Requests

Show All 

1-4 1 - 4 of 58

Other test

Request ID: REQ000002101191
Submitted: 1/29/2016 3:15:53 PM

Status: Submitted

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

Clicking Submit from the service request form will start the approval process. Your request will then show its status as *Submitted* or *Waiting Approval* in the My Requests section of SRM.