
# Staff Human Resources

## SHR Services Client Guide for ITRequest

UC SANTA CRUZ

UNIVERSITY OF CALIFORNIA

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# Service Request User Guide Introduction

This User Guide is intended to help UCSC staff and administrators understand how to access and use the IT Request Ticket System (ITR) to process various Staff Human Resources (SHR) processes prevously supported by a paper workflow.

# Accessing the Staff HR Services

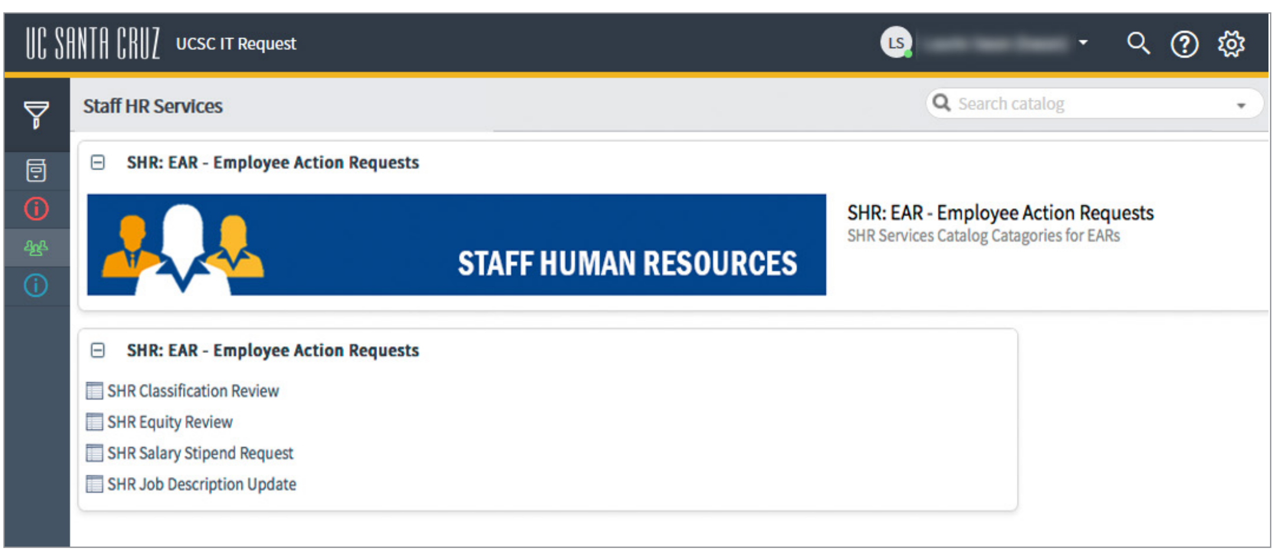
These services may be accessed by a variety of navigational directions leading to the Staff HR Services Catalog.

- Direct URL Link
- Access via the IT Request system
- Access from the SHR Compensation web site page
- Access from the SHR Client Dashboard in ITR

## Direct URL Link

Click on this link to go to the Staff HR Services Catalog in UCSC IT Request.

- goo.gl/QSELj4



## ACCESS VIA THE ITR SYSTEM

- **Go to** the Information Technology Services (ITS) log-in page for ITR
    - https://ucsc.service-now.com

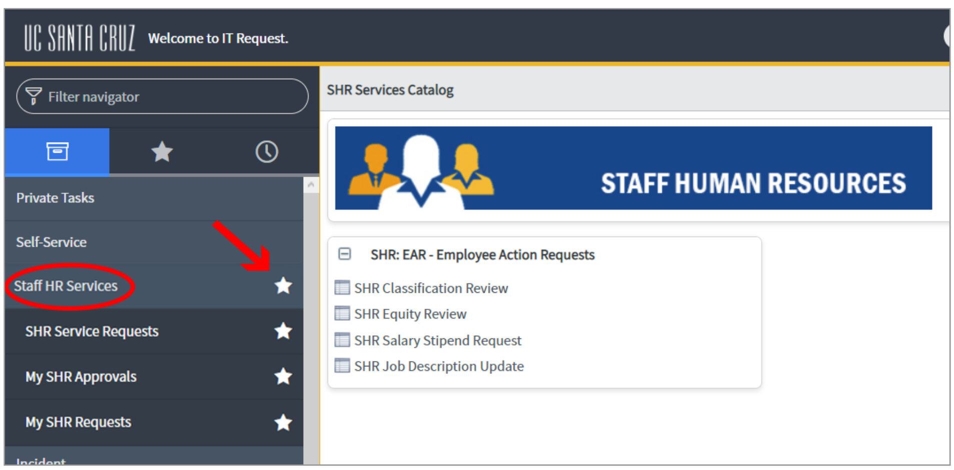
- **Log into** IT Request with your CruzID and Gold password.

  ***Note*** *that access to IT Request now requires using MFA (multi-factor authentications) as a second step to logging in with your CruzID and Gold password. For further information go to Multi-Factor Authentication information on the ITS web site.*

- In the All Applications left side navigation tab select **Staff HR Services** application name directly under Self-Service

*All Applications* *Favorites* *Your History*

- If already configured for the **SHR Client Dashboard** you can also click on Homepage or Dashboards




- You can also click on the **star** to add this menu item to your 'Favorites' tab

You will arrive at the SHR Catalog listings where you can click on the text link for the SHR Service that you require, SHR Classification Review, SHR Equity Review, etc.

## Compensation Web Site

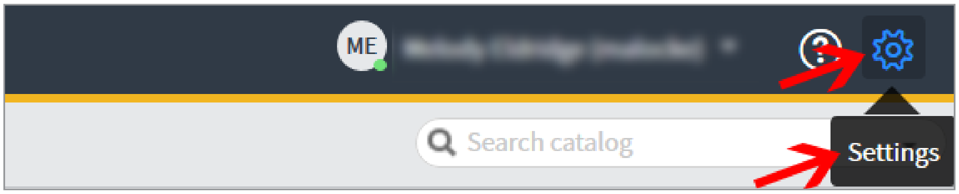
The SHR Compensation website can be found at https://shr.ucsc.edu/compensation/index.html.

Additional compensation information can be found on this web site and the link to the EAR request items is found in the left side navigation as "New EAR Processes (Employee Action Requests)".

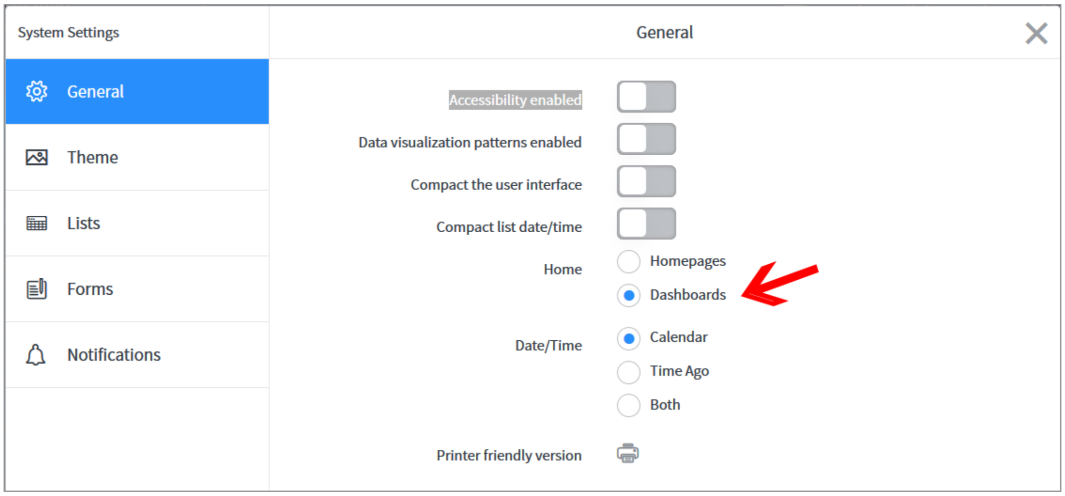
## SHR Client Dashboard

The **SHR Client Dashboard** provides a user with a dashboard in ITR configured specifically for SHR Open Requests and the status of your submitted tickets.

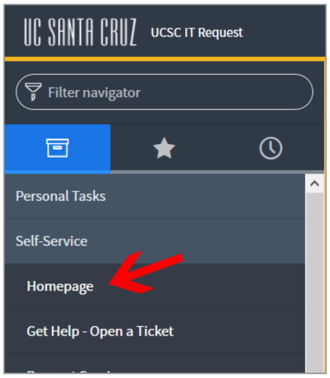
1. **Log into** the ITR system
2. **Click** on the **Settings** gear wheel icon to the right of your user account information in the upper right corner of the ITR window
3. **Click** on the text link "**Settings**"

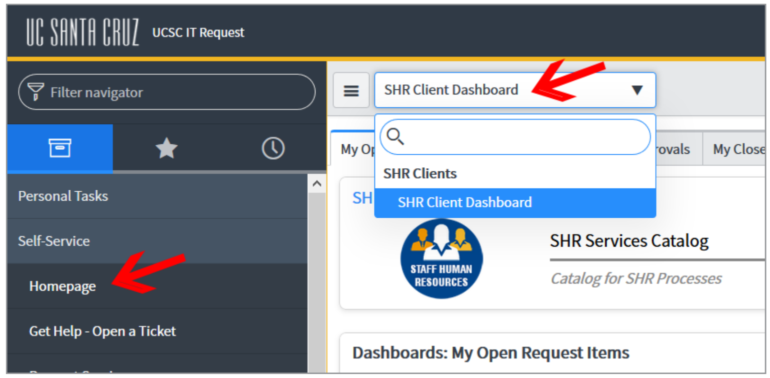



4. The System Settings dialog box appears.
5. **Click** on the **Dashboards radio button** to switch from Homepages to Dashboards



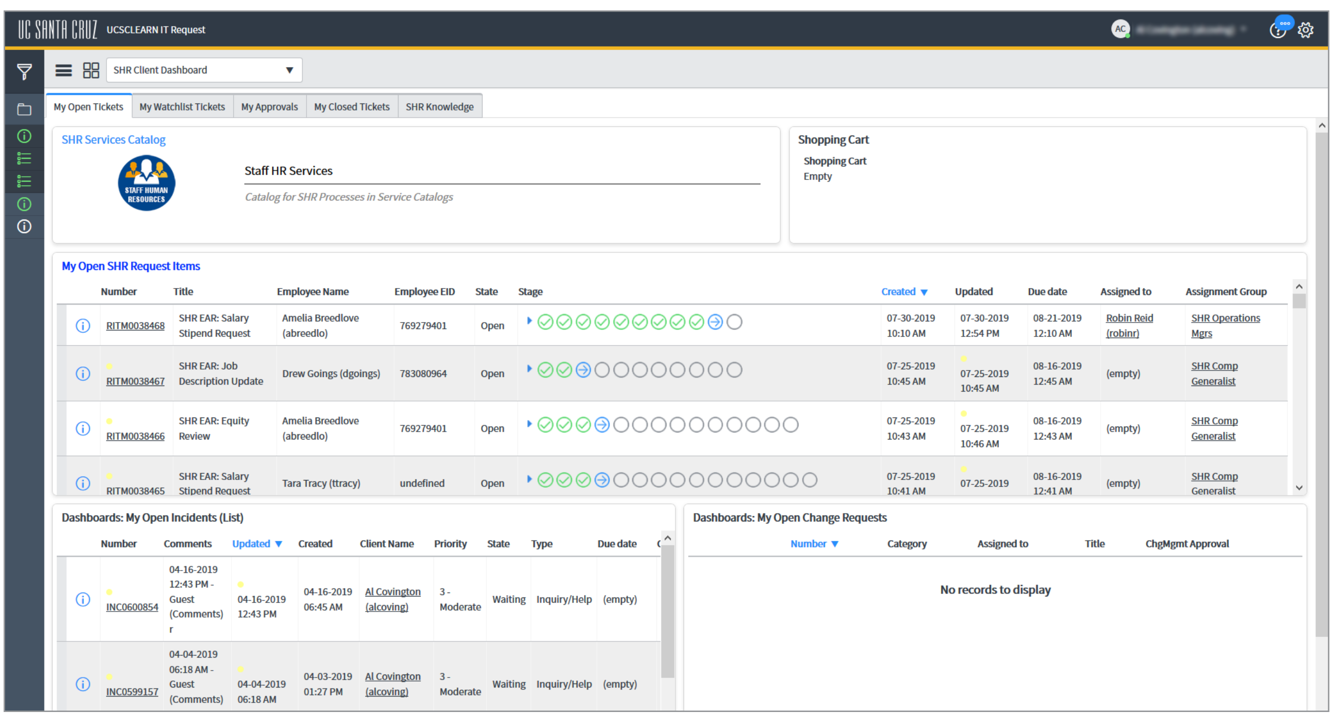
6. From the left side All Applications (or Favorites) **select** "Homepage". If the dashboard "**SHR Client Dashboard**" is not already selected, search for and select it from the pull-down dashboard listing.



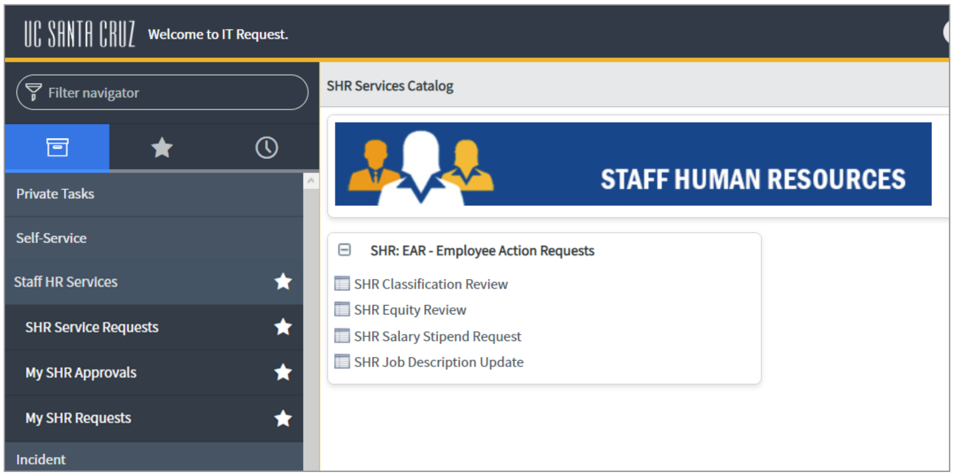

When the SHR Client Dashboard appears it defaults to displaying the first tab, in this case called "**My Open Tickets**". The other four tabs are My Watchlist Tickets, My Approvals, My Closed Tickets and Knowledge Base. 'My' refers to the name of the logged in user.

*Note: The left side navigation has been minimized by clicking on the circled triangle in the bottom left of the window*




There are sections on the dashboard in My Open Tickets to view My Open SHR Request Items along with other open incidents (My Open Incidents), open change requests and other open request items.

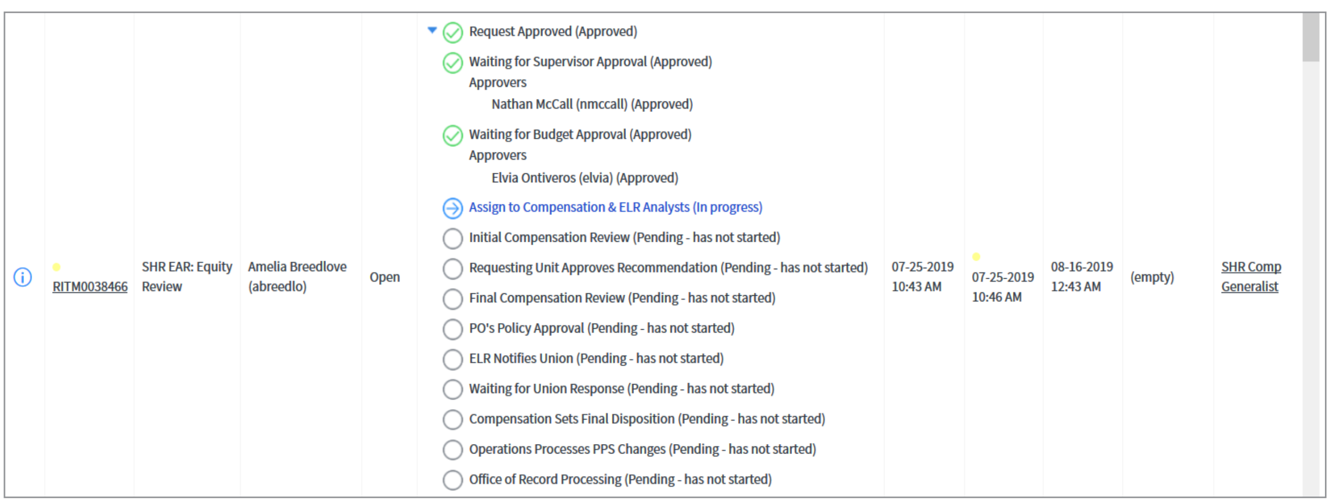
Clicking on the header (with the circular SHR icon) will take the user to the Staff HR Services Catalog where they can select one of the services listed to submit a service request.




On the "**SHR Client Dashboard**", selecting one of the tabs near the top of the window (above the SHR round icon) will alternate the main display window with different selected information (e.g.: My Open TIckets, My Watchlist Tickets, My Approvals, My Closed Tickets and Knowledge Base).

Clicking on the Requested Item number in the left column of the list will open up that item display to show the detailed information.

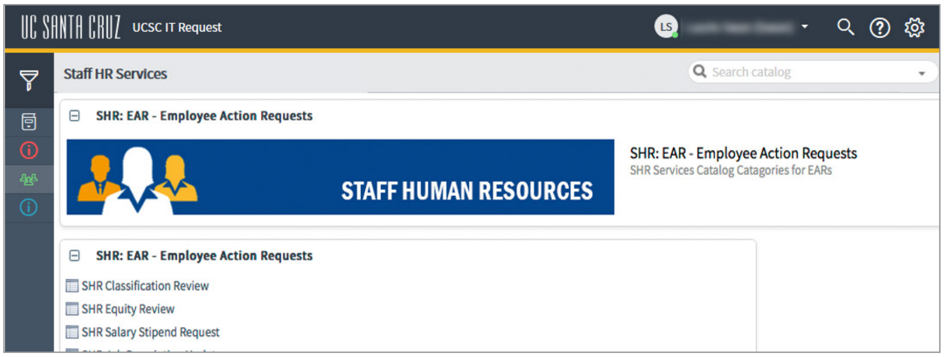
Clicking on the small blue arrow in the Stage column will expand the Stage information to show a list of all stages for that Requested Item and at what point the workflow is currently at (green is completed, blue is current).



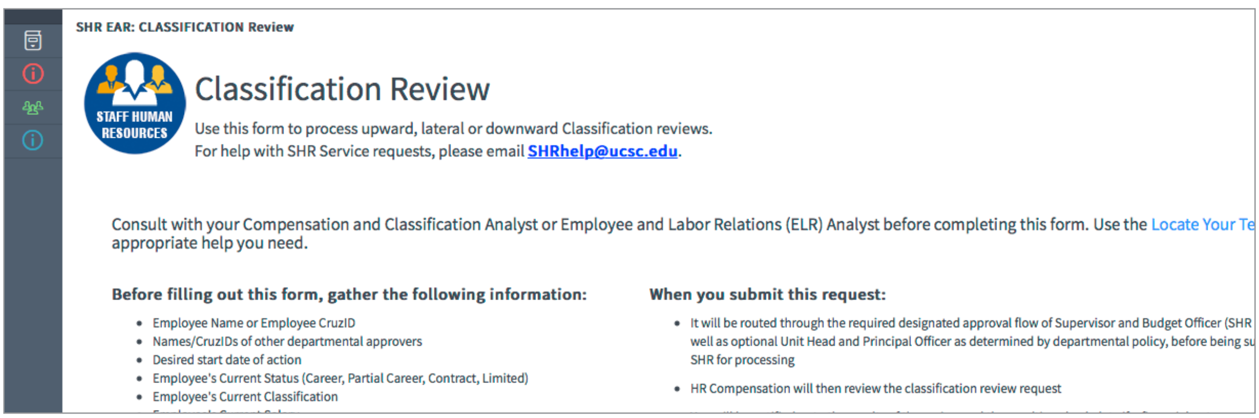
# Preparing a Request

## Select the Desired SHR Service

From the SHR Services choices click on the desired service item link, in this example “SHR Classification Review”.

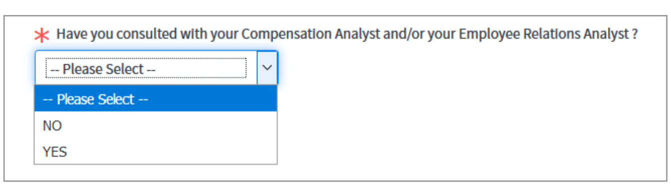



The Classification Review landing page will appear.




It is important to note that at this point **before** proceeding with filling in the form on the following page that you have consulted with your Compensation and Classification Analyst or Employee and Labor Relations (ELR) Analyst.

When you have gathered the required information and consulted with your SHR analyst, then select yes from the following question answer pull-down menu.

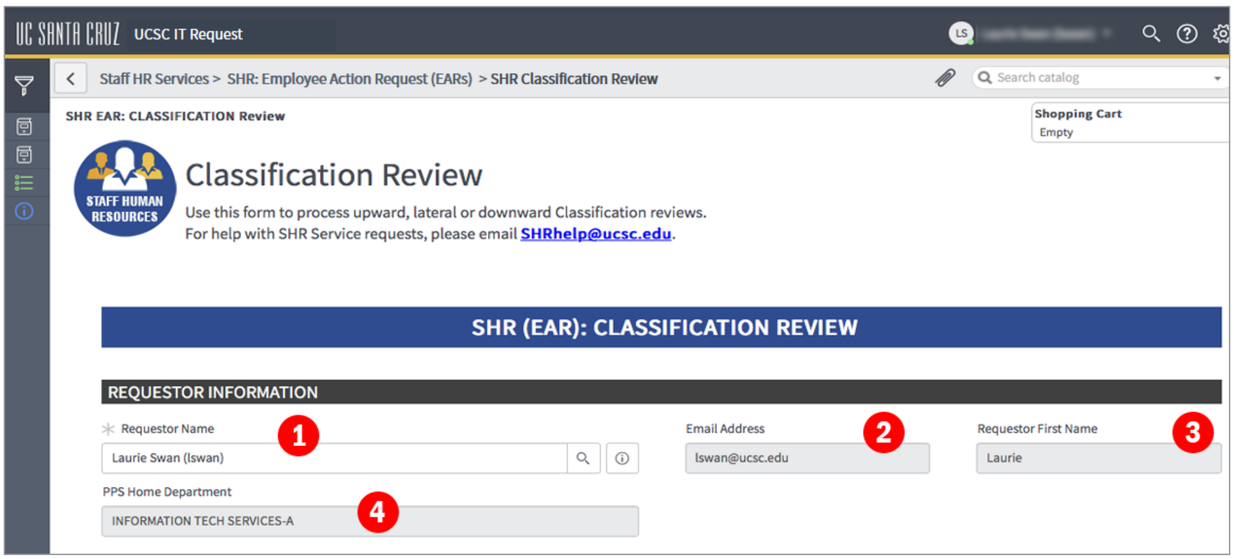


## Filling in the Request Form

The Classification Review form page is grouped into the following sections for data entry...

- Requester information
- Unit or division information
- Employee information (who is having the action requested for)
- Attach supporting documentation
- Critical position information
- Distribution funding information

### Requester Information (client)



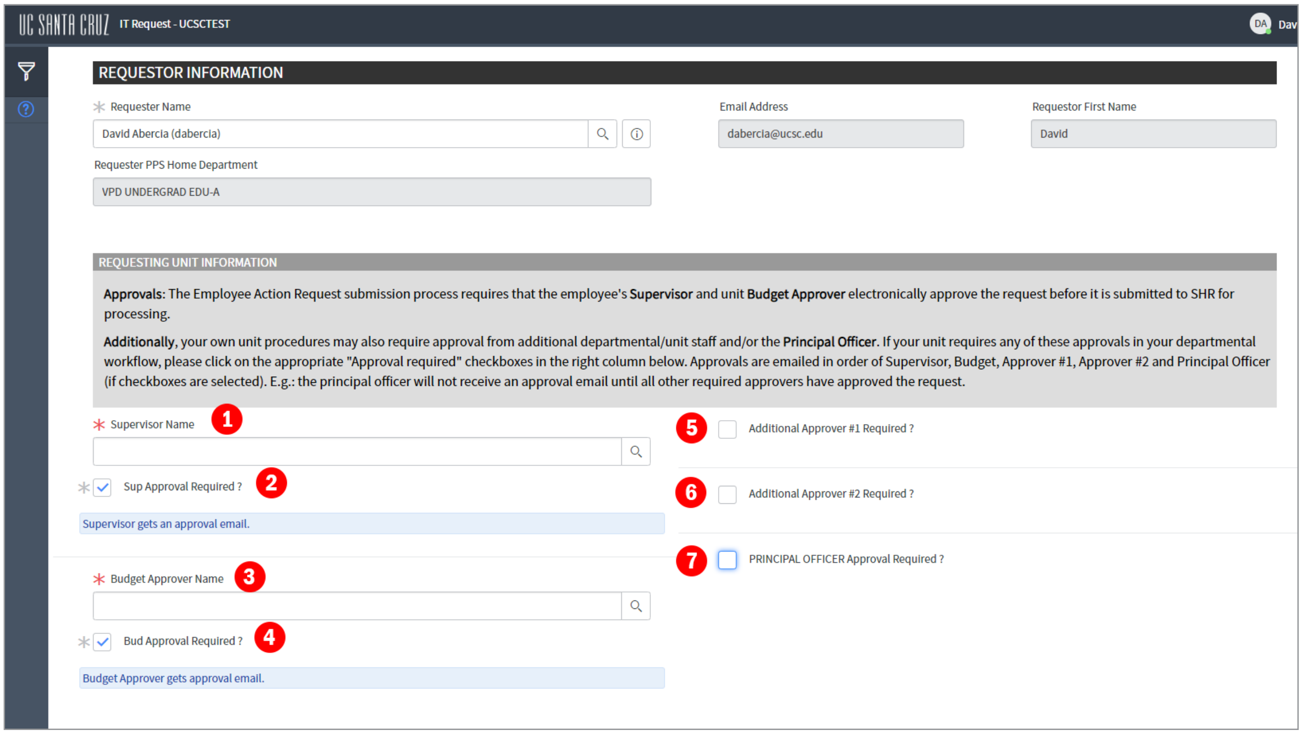

**NOTE**: *The **red *** character before a field label indicates a **mandatory** field.*

When the main request form loads, the form automatically fills in the following information based on the logged-in user:

1. **Requester Name** - person submitting the request. This is **not** the employee for whom the action is being requested
2. **Email Address** - of requester automatically filled in
3. **Requester First Name** - automatically filled in
4. **Department** - requester's home department who is making this employee action request

## Requesting Unit Information

Fill in this section with information about the requesting unit in which the **new** employee action will be happening. Supervisor and Budget approval are mandatory fields for most EAR requests. Provision is made for 2 additional approvers plus the principal officer if required by your departmental policy.

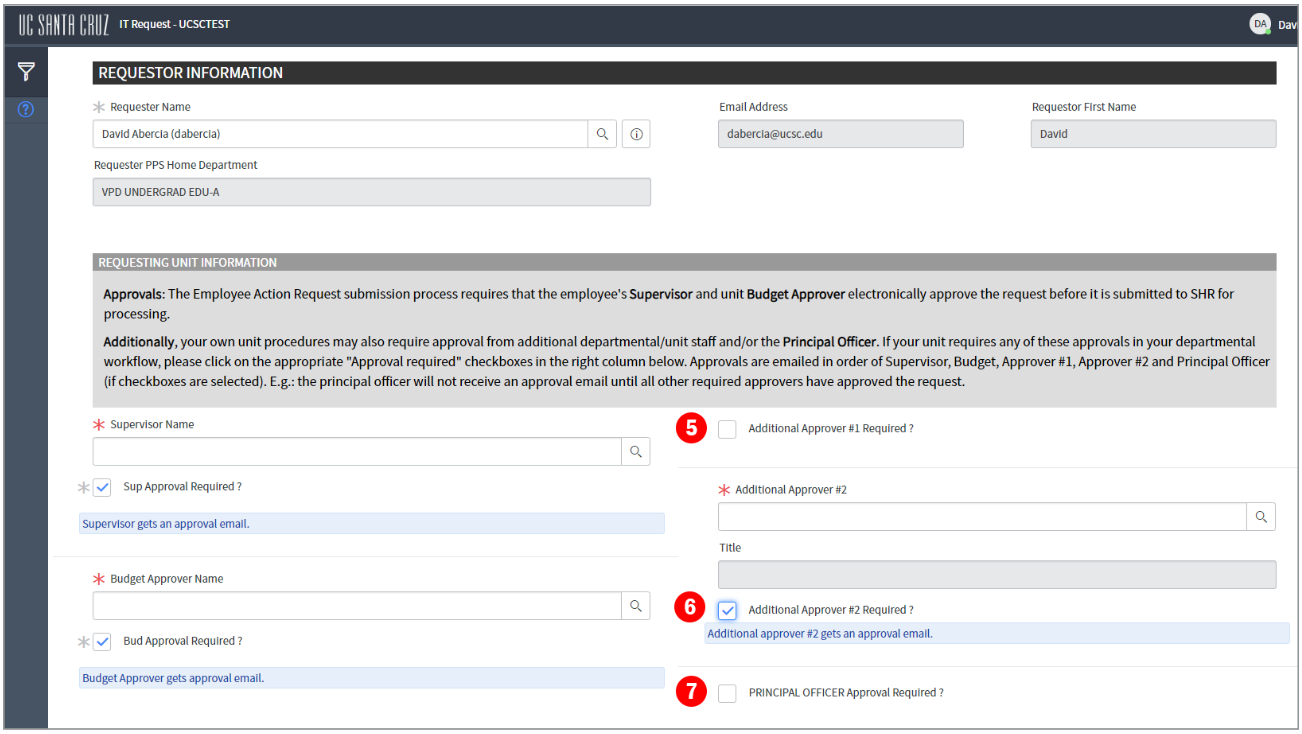



1. **Supervisor Name** - enter the employee's new supervisor (email automatically filled in)
2. **Sup Signature Required** - supervisor signature is mandatory and can't be changed
3. **Budget Approval Name** - enter the name of the department/unit's budget approver (email automatically filled in)
4. **Bud Signature Required** - budget approver signature is mandatory and can't be changed
5. **Additional Approver #1 Required?** - does your departmental workflow require another approver to approve this employee action
6. **Additional Approver #2 Required?** - does your departmental workflow require a second approver to approve this employee action
7. **PRINCIPAL OFFICER Approval Required?** - does your department require the principal officer to approve this employee action (mandatory for Stipends)
   ***Note**: this is separate from any approval by the Principal Officer for any policy issues related to this request which occurs later in the request workflow*

**Approvals:** The Employee Action Request submission process requires that the employee's **Supervisor** and unit **Budget Approver** electronically approve the request before it is submitted to SHR for processing.

**Additionally,** your own unit procedures may also require approval from additional departmental/unit staff and/or the **Principal Officer**. If your unit requires any of these approvals in your departmental workflow, please click on the appropriate "Approval required" checkboxes in the right column below.

In the screen shot below, the **Additional Approver #2** checkbox (#6) has been selected. By checking one of the 3 checkboxes, the corresponding approver name and title (non-editable) fields appear.

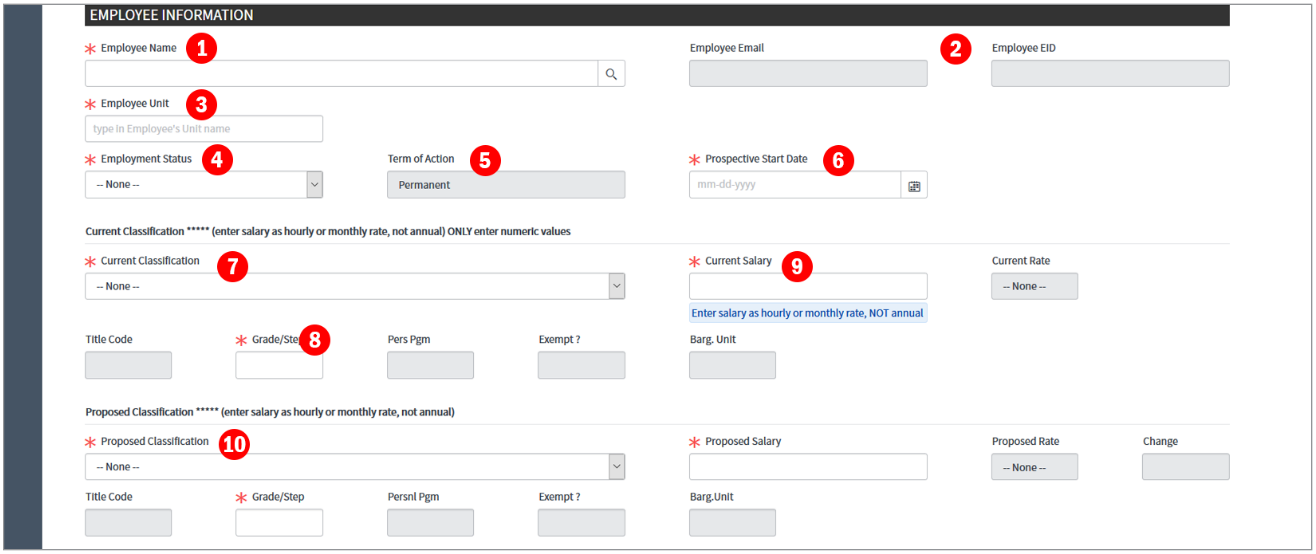



Any combination of the three required signature checkboxes in the right column can be selected. When checked, the appropriate approver will receive an email notification requesting their approval of the EAR request.

Approval notifications are sent in the order of Supervisor, Budget Approver, Additional Approver #1, Additional Approver #2 and Prinicipal Officer. Approvers will not receive their notification until the previous approver has approved the request. Rejecting the approval will immediately end the request and cause it to be set to a state of "**Closed Incomplete**" with a notification sent to the requestor.

**TIP**: To avoid email notification confusion, only enter an approver once even if they hold multiple positions - e.g. approver is both Supervisor and Unit Head (Additional Approver #1 or #2) for an employee's request. Only one approval from that person is required.

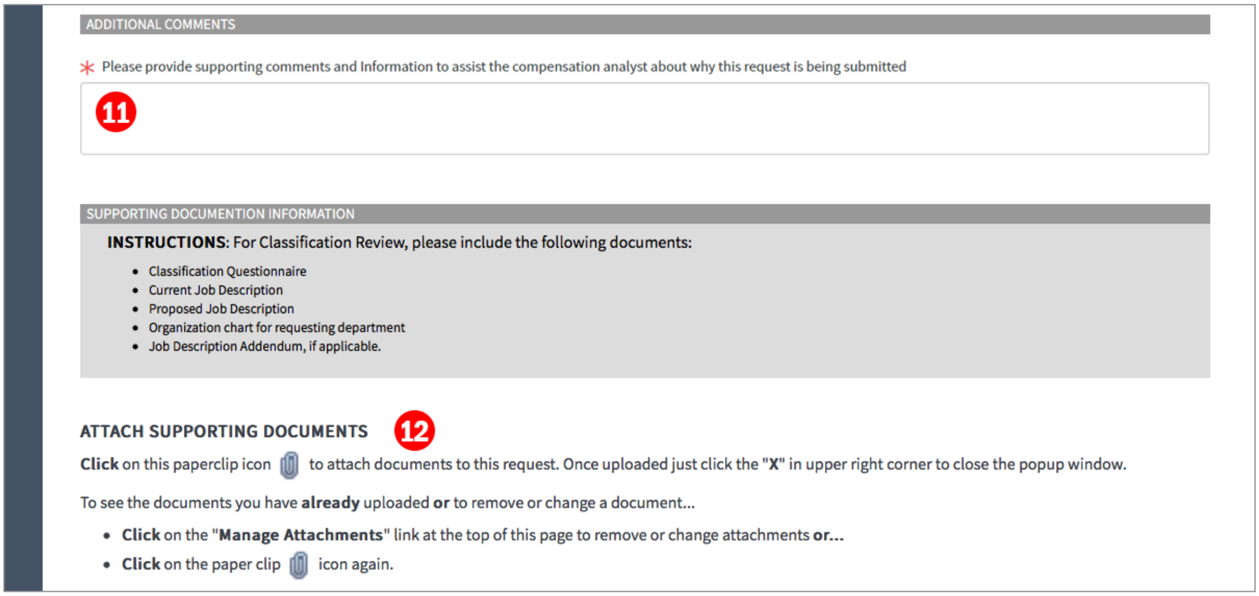
## Employee Information




In the employee information section input the following information:

1. **Employee Name** - who the action is being requested for
2. **Employee Email & EID** - automatically fill in
3. **Employee Unit** - enter the unit that the employee works for
4. **Employment Status** - select from Career, Partial-Year Career, Contract, or Limited
5. **Term of Action** - in this example because the request is a Classification Review, the term of action is Permanent and can not be changed
6. **Prospective Start Date** - pick the proposed date when this employee action will start by clicking on the calendar icon, selecting the correct month and clicking on a day
7. **Current Classification** - select the employee's current classification.
   ***Note** that the Title Code, Grade (not step), Personnel Program and FLSA Exempt/Non-Exempt variable fields will be automatically populate based on the Classification Title***.
8. **Grade/Step** - If the current position is represented, fill in the correct step
9. **Current Salary** - enter the employee's current salary (per hour or per month).
   ***Note** that the grey Current Rate field will automatically be selected (/hr or /mon) based on the salary entered after exiting the salary field*

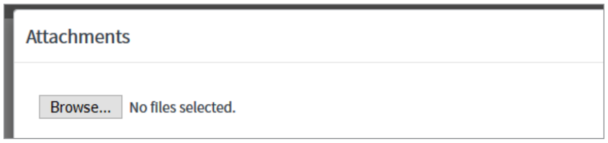
   **Note**: *Do not enter $ or , characters, numbers and . only.*
10. **Repeat steps 7, 8, and 9** *for the Proposed Classification section.*



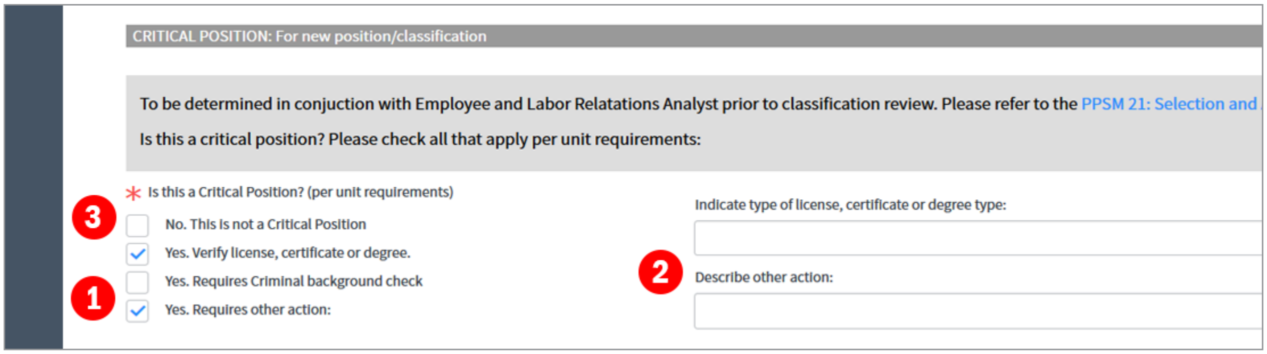

11. **Additional Comments** - add additional comments that will assist SHR in analyzing and processing the requested employee action

## Supporting Documentation Information

12. **Attaching Supporting Documents** - click on the paper icon to bring up access to the system file browser.

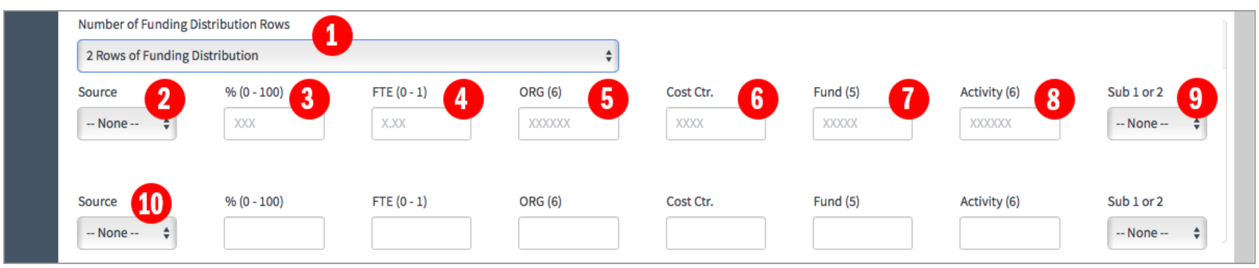



## Critical Position Information




1. Click on the appropriate checkboxes describing whether the new position for the employee has any critical position requirements.
2. For checkboxes 2 and 4 respectively, additional description fields appear to allow entery of further information
3. If the **NO** checkbox is selected, the other fields will hide

## Distribution Funding Information




1. **Number of Funding Distribution Rows** - select the number of distriutions for this appointment.

***NOTE**: If more than 4 distributions are selected, a multiline text field will appear. Put each additional distribution on a separate line with the distribution information (items 2 - 9) separated by commas.*

*e.g. UNIT,35,0.35,123456,4321,12345,654321,Sub 2*

2. **Source of Funds** - use pull down menu to select UNIT or DIV
3. **Percent** - input the percentage for this distribution (0 - 100%)
4. **FTE - Full Time Employee** - enter the value (from 0 to 1) of the FTE distribution

5. **Organization** - the 6 digit identifier for the unit of budget responsibility
6. **Cost Center** - the 4 digit identifier for the cost center
7. **Fund** - the 5 digit unique fund identifier
8. **Activity** - the 6 digit identifier for the sub & object account
9. **Sub Funding** - select either 1 or 2 from the pull down menu
10. **2nd Row of Distribution** - if 2 or more rows of distribution were selected, fill in the data

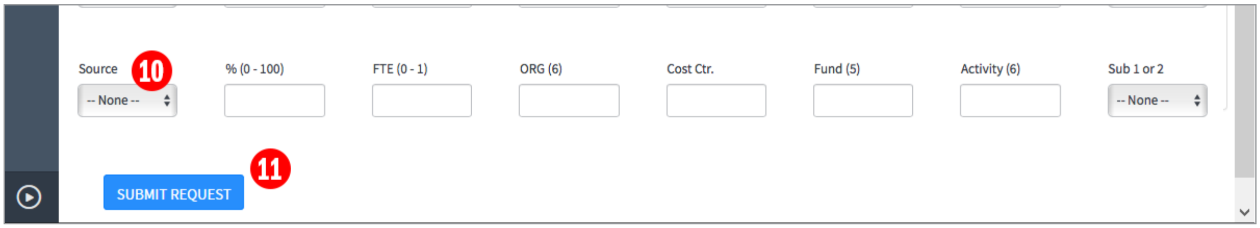
# Submitting the Request

Submitting the SHR Service request is a two-step process.

1. **Submit** the Requested Item (add requested item to the shopping cart)
2. **Checkout** the Shopping Cart

## Step 1: SUBMIT the Request

After all of the required information is input onto the form, **click** on the blue **SUBMIT REQUEST (11)** button at the bottom of the client input area.



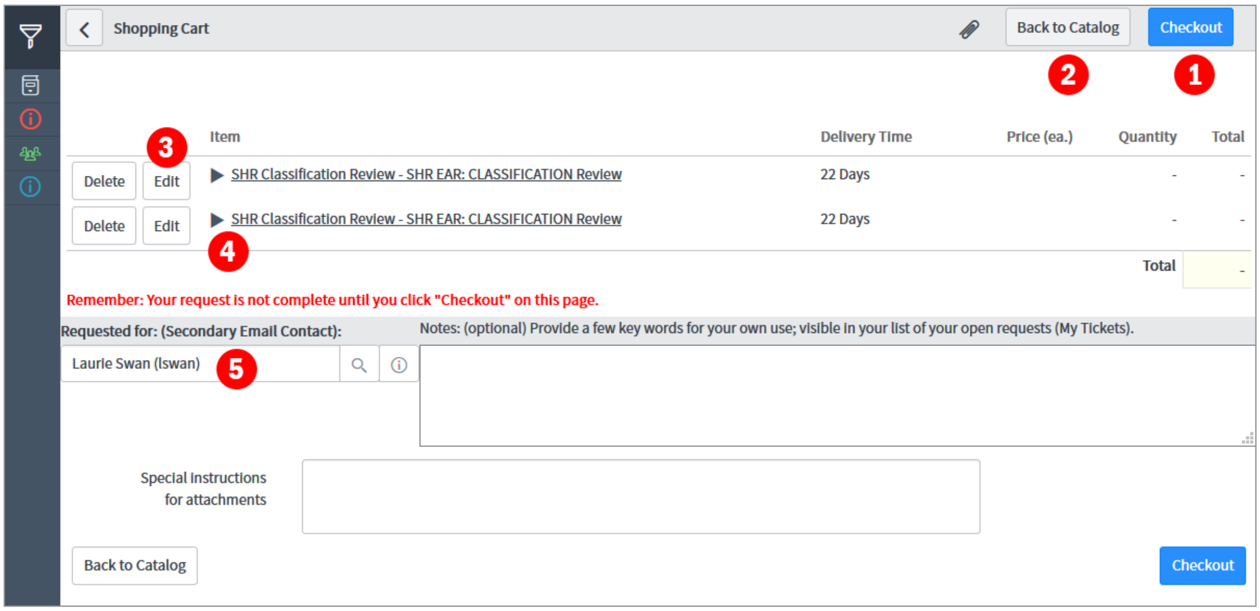

> **NOTE**:
> If you have not prepared all of the information entered into the request form, you can still submit the form with the blue button and then return to the shopping cart later and edit the form again with updated information. This is like a 'save' step.

After clicking on the **SUBMIT REQUEST** button, navigation will take you to the **Shopping Cart** page (see following section Step 2:Checkout for the Shopping Cart).

However, at this point, you may decide to navigate away from the Shopping Cart to do other request submissions or activites in or outside of the IT Request system. The submitted Request Item will continue to sit in your shopping cart until you return or add another item to it.

If you leave the shopping cart and wish to return later, follow the steps in the section Return to the Shopping Cart.

## Step 2: Checkout from the Shopping Cart




When the **SUBMIT REQUEST** button is clicked, the shopping cart page displays. It is a 2-step process to submit the employee action request.

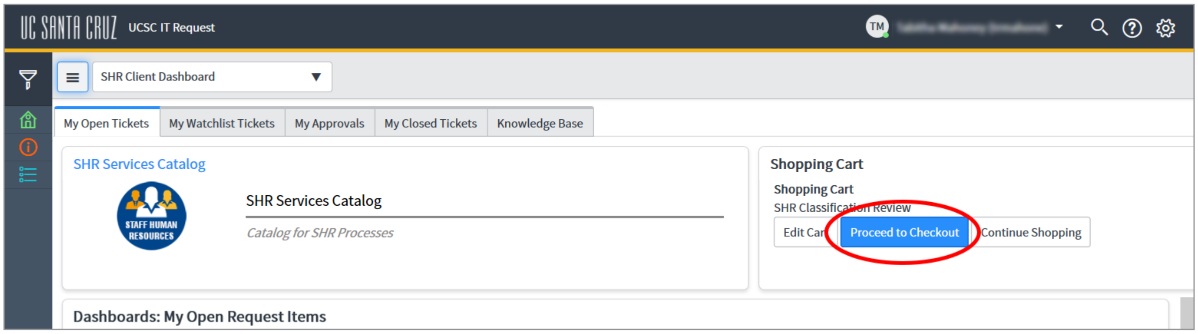
1. **Click** the **Checkout** button to complete the checkout of this request.
2. To add another request, click on the **Back to Catalog** to return to the SHR Services Catalog listings to select another request. This page will become a bulk submit if other requests are added to the Item area.
3. Click on the **Edit** button to go back to the just submitted request for further editing.
4. Click on the **black triangle** or request item **title** to expand a list of the submitted data.
5. Requested for: do not change this field. It should remain as the responsible department contact who submitted the form.
   ***Do not enter the employee's name here.***

The submitted request will now go to the first step in the workflow which is generally to the Unit approvals before being submitted to SHR.

### Return to Shopping Cart

As stated earlier, if you submit a service request without clicking on the "**CHECKOUT**" button on the Shopping Cart page you have a SHR Services request item sitting in the Shopping Cart. To return to the Shopping Cart and complete the transaction complete the following steps.

1. Go to the **SHR Client Dashboard**

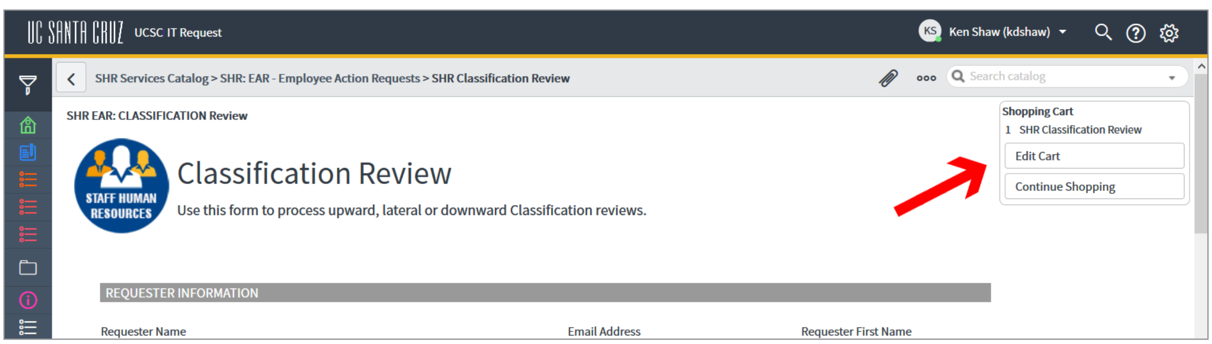



2. Click on the blue "**Proceed to Checkout**" button

   You are taken to the Shopping Cart page and your reviously submitted item(s) are listed in the table (items that have not yet been checked out).

## Item(s) Currently in Shopping Cart

If you start a new SHR Service Request and currently have a submitted item(s) in the shopping cart you will see information about that in the top right corner of the new SHR Service request form.




You can go to the cart (Edit Cart) button to see what is in the shopping cart or continue entering the new request. After clicking on the SUBMIT REQUEST button, the new request plus existing requests will be visible in the Shopping Cart.

# Navigating Staff HR Services

After submitting a request to Staff HR Services there are 2 ways to navigate the system to find your active SHR Requests and approvals.

## 1. SHR Client Dashboard

Return to the SHR Client Dashboard.

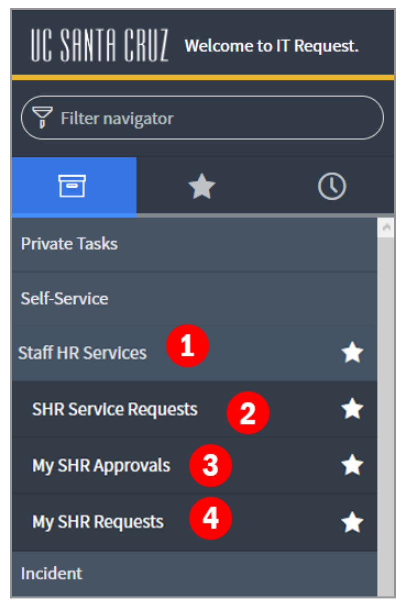
*Refer to discussion "SHR Client Dashboard" on page 5"*

## 2. Staff HR Services Menu Item

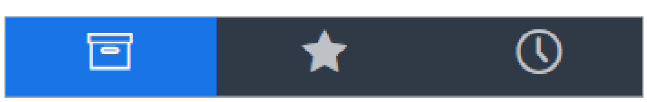
In the left side application navigation, select the application menu item "Staff HR Services".

### Menu Items

1. **Staff HR Servces**: main application menu
2. **SHR Service Requests**: link to the Staff HR Services homepage to find listing of SHR requests types
3. **My SHR Approvals**: Listing of all of your SHR approval requests
4. **My SHR Requests**: Listing of all of your SHR Requested Items



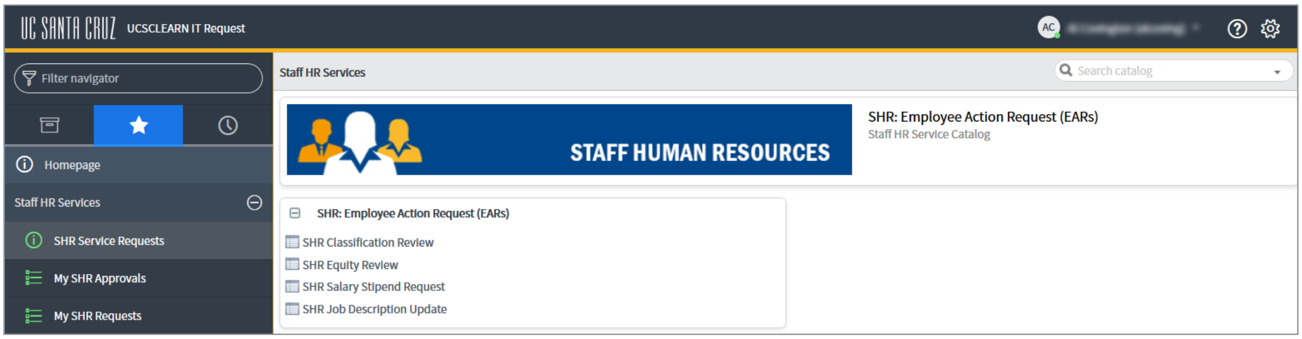

If this main menu item (#1) is not near the top of the list, double click on the **All application** blue tab above the navigation list to collapse the navigation items (menu modules) so that only the primary application menus are showing. Then click on Staff HR Services to expand it's sub-menus.



*All Applications* *Favorites* *Your History*

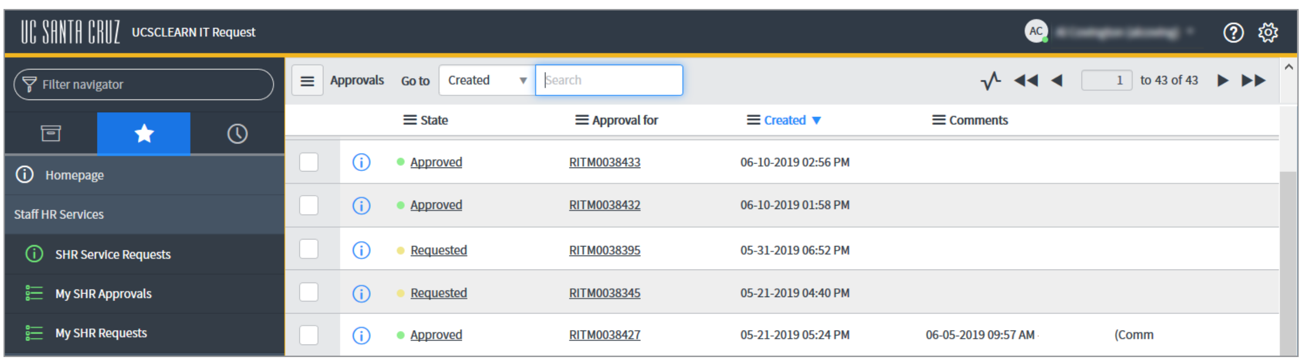
## Menu Item #2. SHR Service Requests

This links to the Staff HR Services catalog page which lists available SHR service requests.




## Menu Item #3. My SHR Approvals

This is a listing of all of your approvals for SHR catalog items. State will show whether they are Requested approvals, those already Approved, Cancelled, Rejected or Not Yet Requested.



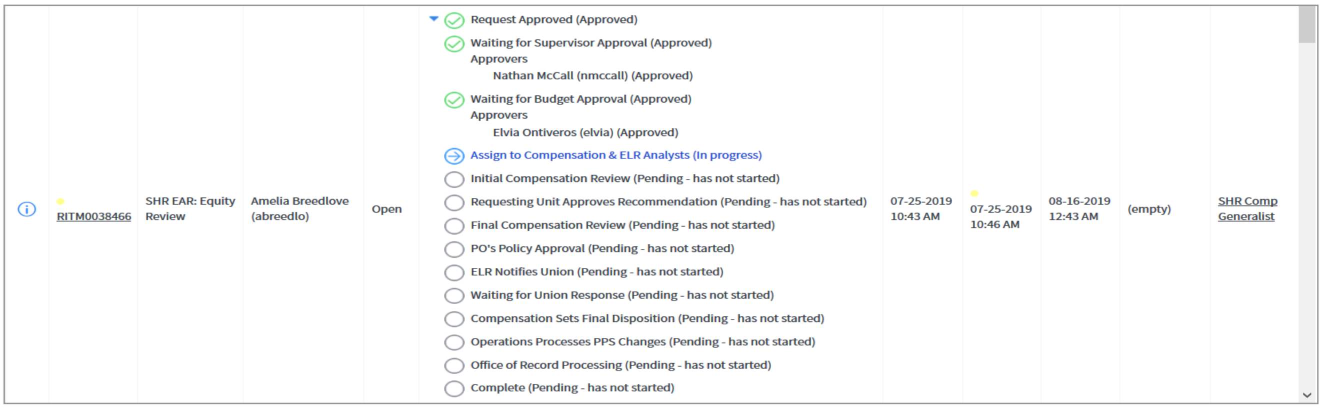

## Menu Item #4. My SHR Requests

This is a list of all (open and closed) SHR service requests for the logged in user.

# Workflow Stages

Upon submitting a SHR Services request, the digital workflow goes through a number of stages marking the request's progress through the system.

The progress of each request can be visualized by the visual stage rendering for each request on the client's My Open Tickets dashboard. This is the expanded Stage view showing the graphical colored stage icons and descriptive text. The colapsed view shows only a row of icons.




## Classification Review

1. Request Approved
2. Waiting for Supervisor Approval (repeated for Budget approver, Unit Head and Principal Officer per submitting unit requirements)
3. Assign to Compensation & ELR Analysts
4. Initial Compensation Review
5. Requesting Unit Approves Recommendation
6. Final Compensation Review
7. PO's Policy Approval *(if required)*
8. ELR Notifies Union *(if required)*
9. Waiting for Union Response *(if required)*
10. Compensations Sets Final Disposition
11. Waiting for Final Signatures *(if required from Employee & Supervisor)*
12. Operations Processes PPS Changes
13. Office of Record Processing
14. Complete