



California  
**DEPARTMENT OF TECHNOLOGY**  
Office of Technology Services

# Service Request Fulfillment Training “On Behalf Of”

Date: 12/22/15

# Module Objectives

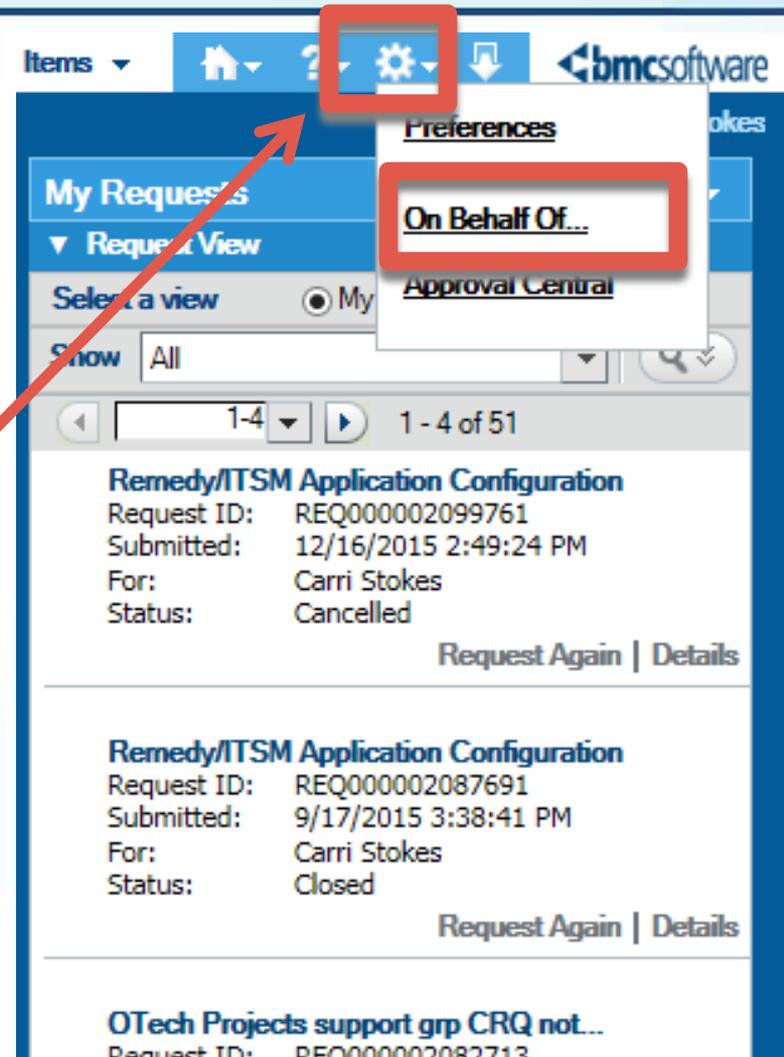
- **Lesson 1:** Creating a Service Request “On Behalf of” another person
- **Lesson 2:** Reporting using “On Behalf Of”

# Lesson 1

## Creating a Service Request “On Behalf of” another person

You can submit requests on behalf of users if your administrator has granted you access.

To submit a request on behalf of another user, click the *Settings* icon at the top right of the SRM Application Console, then select *On Behalf Of....*



The screenshot shows the BMC Software SRM Application Console interface. At the top right, there is a navigation bar with icons for home, help, settings, and download. The settings icon (a gear) is highlighted with a red box. A red arrow points from the settings icon to a dropdown menu that is open, showing the option 'On Behalf Of...' which is also highlighted with a red box. Below the settings icon, there is a 'My Requests' section with a 'Request View' dropdown and a 'Select a view' dropdown set to 'My'. There is also a 'Show' dropdown set to 'All'. The main content area displays a list of requests. The first request is titled 'Remedy/ITSM Application Configuration' with Request ID: REQ000002099761, Submitted: 12/16/2015 2:49:24 PM, For: Carri Stokes, and Status: Cancelled. The second request is also titled 'Remedy/ITSM Application Configuration' with Request ID: REQ000002087691, Submitted: 9/17/2015 3:38:41 PM, For: Carri Stokes, and Status: Closed. The third request is partially visible, titled 'OTech Projects support grp CRQ not...' with Request ID: REQ000002082713. Each request entry has a 'Request Again | Details' link.

# Lesson 1

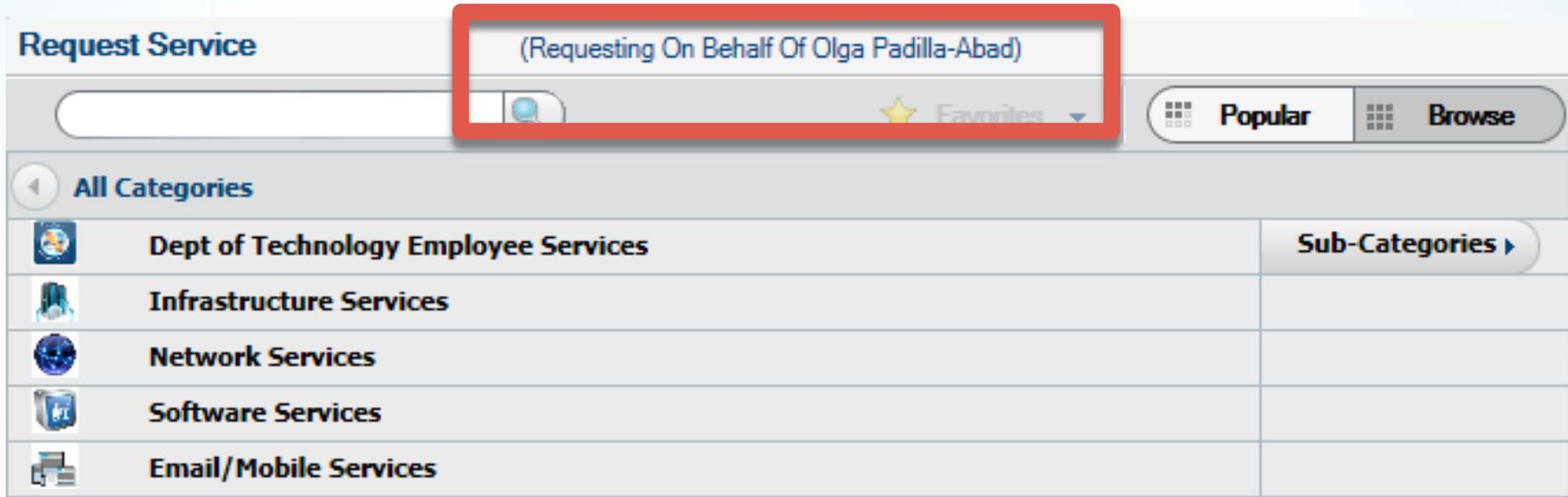
## Creating a Service Request “On Behalf of” another person

Name	Email	Phone	Site Group
Olga Padilla-Abad	olga.padilla-abad@dts.ca.gov	1 916 431-4054	Rancho Cordova
Olga Boyarkin	olga.boyarkin@state.ca.gov	1 916 431-4654	Rancho Cordova

You may click the *Search* icon to find all the users on whose behalf you are permitted to submit requests. 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 1

## Creating a Service Request “On Behalf of” another person



The screenshot shows the 'Request Service' interface. At the top, there is a header area with the text 'Request Service' on the left and a dropdown menu on the right that is currently set to '(Requesting On Behalf Of Olga Padilla-Abad)'. This dropdown menu is highlighted with a red rectangular box. Below the header, there is a search bar and a 'Favorites' section. The main content area is titled 'All Categories' and lists several service categories: 'Dept of Technology Employee Services', 'Infrastructure Services', 'Network Services', 'Software Services', and 'Email/Mobile Services'. A 'Sub-Categories' button is visible next to the first category.

The ***Requesting On Behalf Of*** label shows on top of the SRM application console. From this point onwards, any service requests created by you will be on behalf of the user you have chosen, until you perform the action of ***Back to Myself***.

# Lesson 1

## Creating a Service Request “On Behalf of” another person

After you complete the form submission, you can click *Back to Myself* from the *Settings* menu bar to return the system to its normal state.

The screenshot shows the BMC Software interface. At the top, there is a navigation bar with 'Items', a home icon, a question mark, a settings gear icon (highlighted with a red box), and a download icon. Below this is a 'My Requests' section with a 'Request View' dropdown and a 'Select a view' dropdown set to 'My'. A 'Show' dropdown is set to 'All'. A red arrow points from the text on the left to the 'Back to Myself' option in the settings menu. The main content area displays two request cards. The first card is titled 'unable to open any applications - clocks' and has the following details: Request ID: REQ000002044932, Submitted: 2/9/2015 1:20:51 PM, For: Olga Padilla-Abad, Status: Closed. The second card is titled 'SharePoint Sites and Maintenance' and has the following details: Request ID: REQ000002039842, Submitted: 1/13/2015 3:47:07 PM, For: Olga Padilla-Abad, Status: Closed. Both cards have a 'Details' link at the bottom right.

# Lesson 1

## Creating a Service Request “On Behalf of” another person

The screenshot shows a web form titled "Professional Services - Internal (new)". The form contains several fields and buttons:

- Requested By:** Carri Stokes
- Requested For:** Carri Stokes
- Phone:** 1 916 431-4052
- Email:** carri.stokes@state.ca.gov
- Required Completion:** A date picker field.
- Attachments:** Three green plus icons.
- Instructions:** A section with a dropdown arrow and an information icon.
- Fields with asterisks:** Billing Prefix, Approver, Second Approver, and Third Approver, each with a dropdown menu.

The "Edit" button is highlighted with a red box, and a red arrow points to it from the right side of the form.

The *Service Request* form also enables a one time submission of a request on behalf of another user. On the *Service Request* form, click *Edit* to modify the *Requested For* field.

# Lesson 1

## Creating a Service Request “On Behalf of” another person

**Professional Services - Internal (new)**

Requested By: Carri Stokes  
Requested For: Carri Stokes  
Phone: 1 916 431-4052  
Email: carri.stokes@state.ca.gov  
Save

Required Completion: [ ]

Attachments: [ + ] [ + ] [ + ]

Instructions

**Billing Prefix \*** [ ]  
Account Code [ ]  
**Approver \*** [ ]  
**Second Approver \*** [ ]  
**Third Approver \*** [ ]

Once the field is unlocked, click the *On Behalf Of Request* button located next to the *Requested For* field.

# Lesson 1

## Creating a Service Request “On Behalf of” another person

A Popup menu appears, where you would enter the user's name in the *Search* field and click the *Search* icon. Select the user from the search results and click *Select*.

Professional Services - Internal (new)

Requested By: Carri Stokes Phone: 1 916 431-4052 Save  
Requested For: Carri Stokes Email: carri.stokes@state.ca.gov

Required Completion: [ ]

Attachments: +

Instructions

Billing Prefix \*  
Account Code  
Approver \*  
Second Approver \*  
Third Approver \*  
Do you wish to expedite?  
Are you requesting a...

Search: olga

2 entries returned - 2 entries matched

Name	Email	Phone	Site Group
Olga Padilla-Abad	olga.padilla-abad@dts.ca.gov	1 916 431-4054	Rancho Cordova
Olga Boyarkin	olga.boyarkin@state.ca.gov	1 916 431-4654	Rancho Cordova

Select Cancel

# Lesson 1

## Creating a Service Request “On Behalf of” another person

Professional Services - Internal (new)

Requested By: Carni Stokes

Requested For: Olga Padilla-Abad

Phone: 1 916 431-4054

Email: olga.padilla-abad@dts.ca.gov

Required Completion: [ ]

Attachments: [ + ] [ + ] [ + ]

Instructions

Billing Prefix \*

Account Code

Approver \*

Second Approver \*

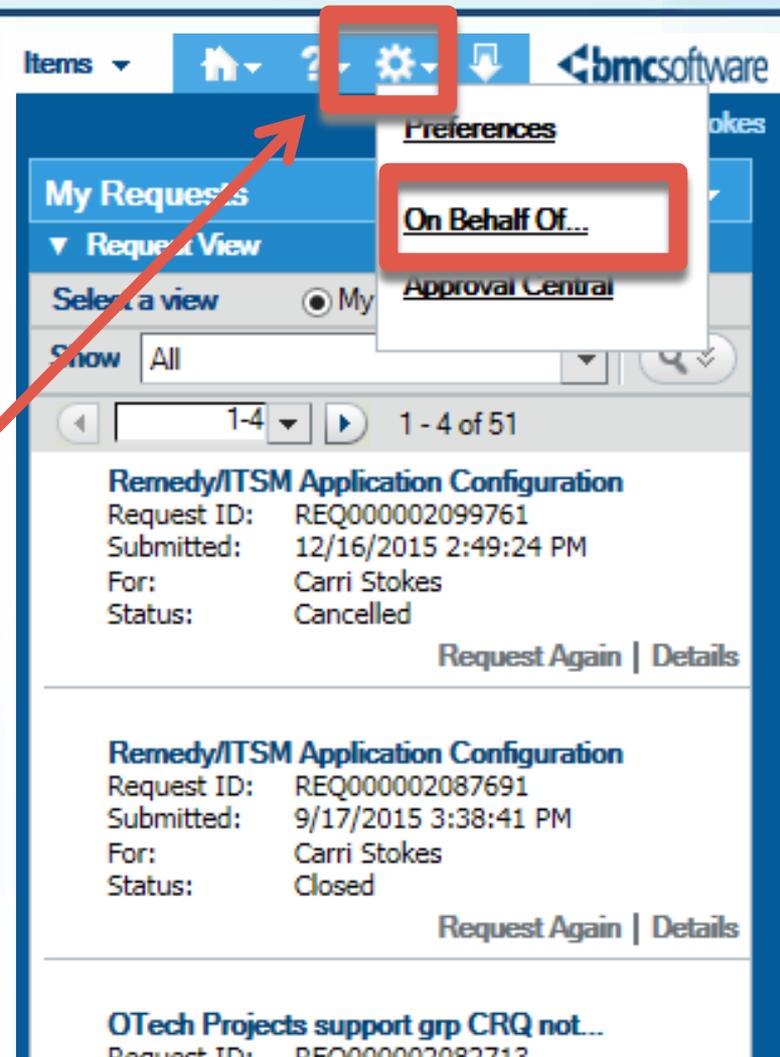
Third Approver \*

The *Service Request* form is now updated to display the person’s name that you selected in the *Requested For* field.

# Lesson 2

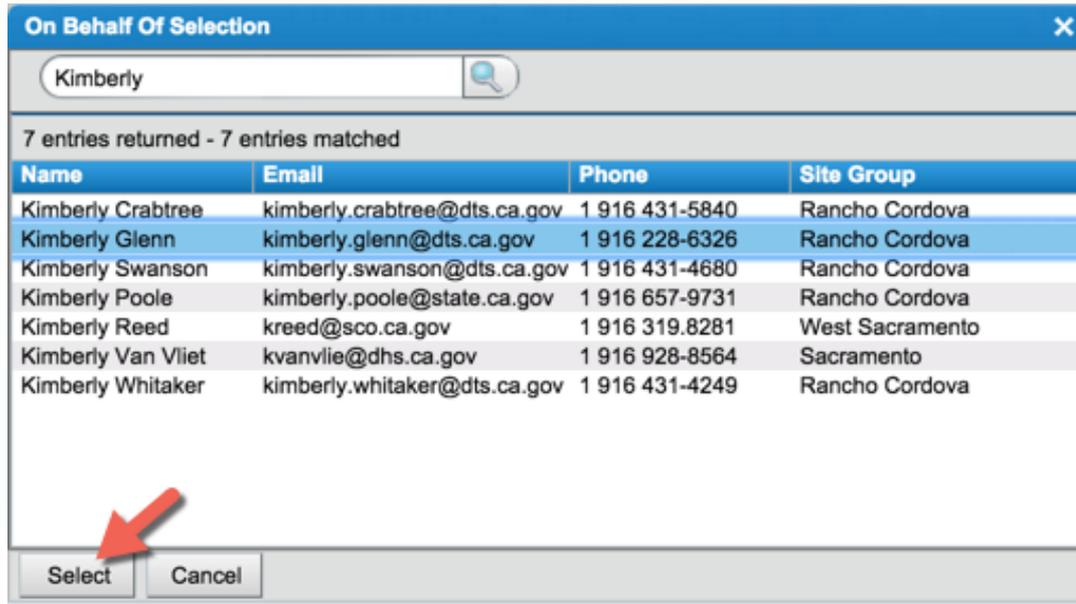
## Reporting using 'On Behalf Of'

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



# Lesson 2

## Reporting using 'On Behalf Of'



On Behalf Of Selection

Kimberly

7 entries returned - 7 entries matched

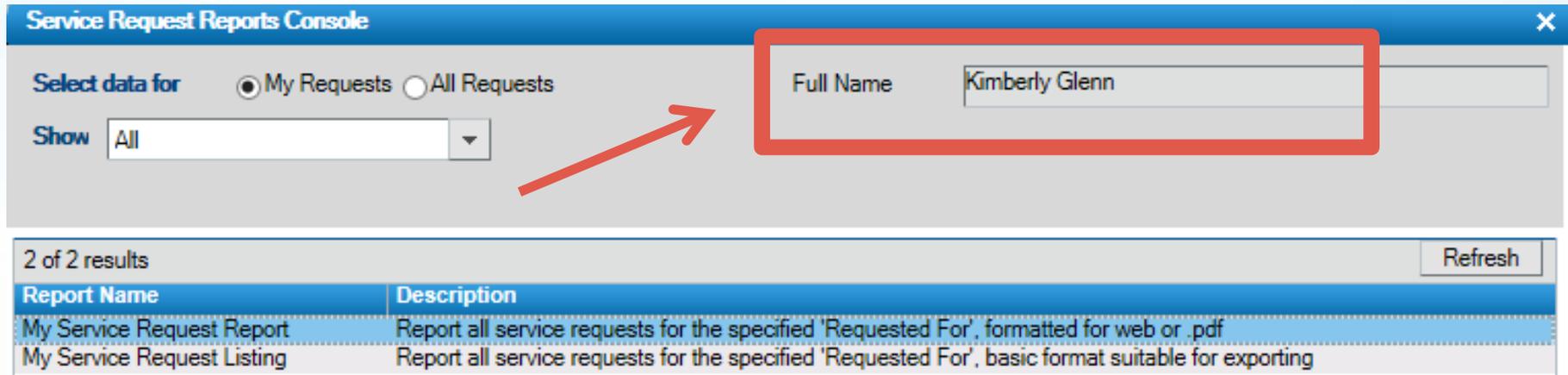
Name	Email	Phone	Site Group
Kimberly Crabtree	kimberly.crabtree@dts.ca.gov	1 916 431-5840	Rancho Cordova
Kimberly Glenn	kimberly.glenn@dts.ca.gov	1 916 228-6326	Rancho Cordova
Kimberly Swanson	kimberly.swanson@dts.ca.gov	1 916 431-4680	Rancho Cordova
Kimberly Poole	kimberly.poole@state.ca.gov	1 916 657-9731	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 2

## Reporting using 'On Behalf Of'



Service Request Reports Console

Select data for  My Requests  All Requests

Show

Full Name

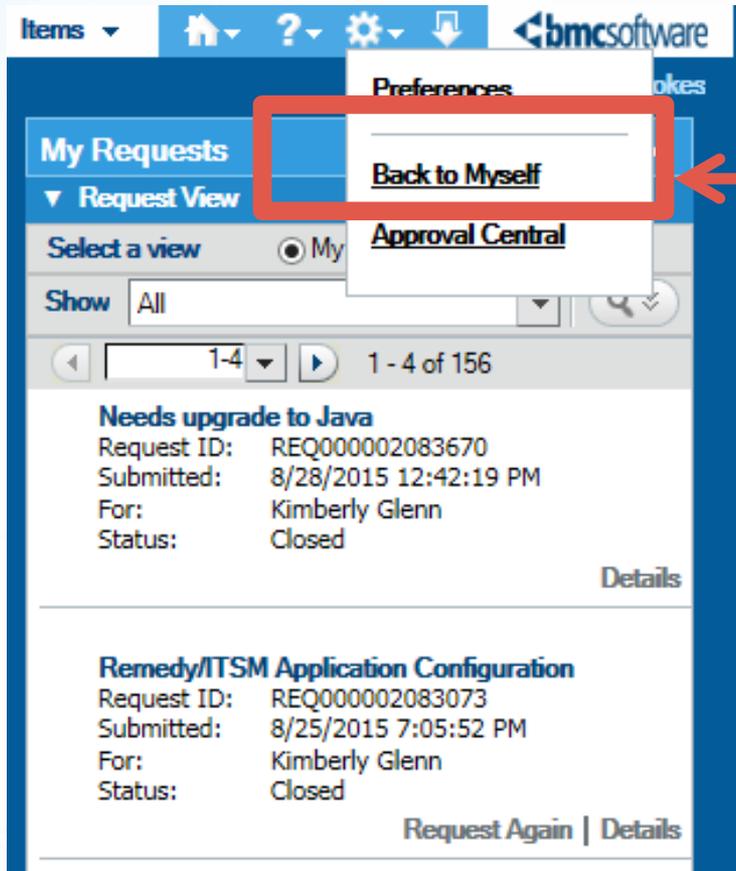
2 of 2 results Refresh

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 2

## Reporting using 'On Behalf Of'



The screenshot shows the BMC Software SRM Application Console Home page. At the top, there is a navigation bar with icons for home, help, settings, and download. The 'Settings' icon (a gear) is highlighted with a red box. A dropdown menu is open, showing the option 'Back to Myself' which is also highlighted with a red box and pointed to by a red arrow. 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). There are 'Details' links for each request.

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