

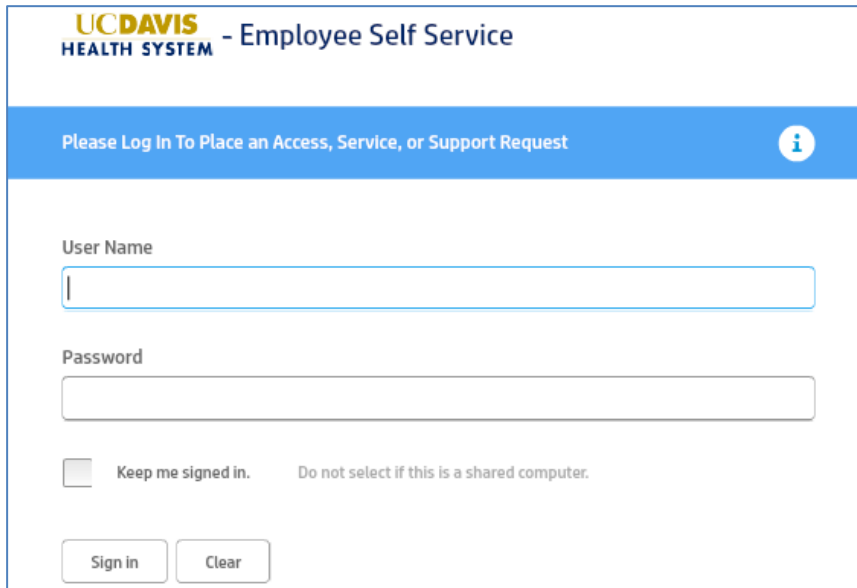
Employee Self Service Training

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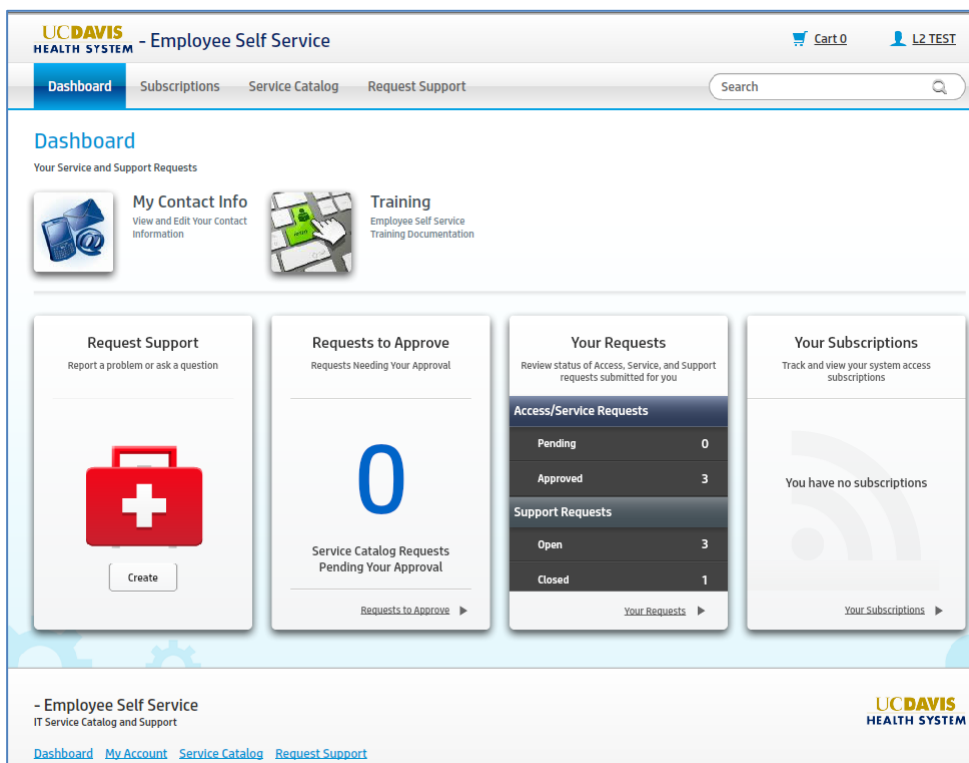
Logging into Employee Self Service

1. Log into the Employee Self Service at <https://ess.ucdmc.ucdavis.edu/src/secure/main.jsp> using your Computer/Active Directory/Citrix login username and password and click on **Sign In**.



The login form is titled "UC DAVIS HEALTH SYSTEM - Employee Self Service". It has a blue header bar with the text "Please Log In To Place an Access, Service, or Support Request" and an information icon. Below the header, there are two input fields: "User Name" and "Password". Below the password field, there is a checkbox labeled "Keep me signed in." with the text "Do not select if this is a shared computer." to its right. At the bottom, there are two buttons: "Sign in" and "Clear".

2. By default the **Employee Self Service Dashboard** appears.



The dashboard is titled "UC DAVIS HEALTH SYSTEM - Employee Self Service". It has a navigation bar with "Dashboard", "Subscriptions", "Service Catalog", and "Request Support". A search bar is on the right. The main content area is titled "Dashboard" and "Your Service and Support Requests". It features four main sections: "My Contact Info" (View and Edit Your Contact Information), "Training" (Employee Self Service Training Documentation), "Request Support" (Report a problem or ask a question) with a red first aid kit icon and a "Create" button, and "Requests to Approve" (Requests Needing Your Approval) with a large blue "0" and a "Requests to Approve" link. To the right of "Requests to Approve" is a "Your Requests" section with a table showing the status of Access, Service, and Support requests. Below the table is a "Your Subscriptions" section with a message "You have no subscriptions" and a "Your Subscriptions" link. The footer contains the text "- Employee Self Service IT Service Catalog and Support" and the UC Davis Health System logo.

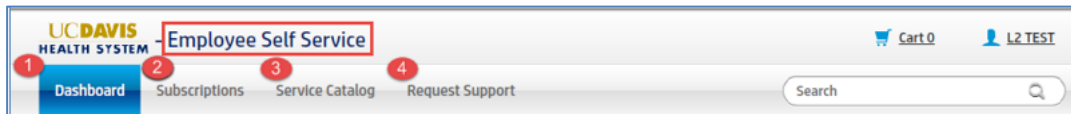
Access/Service Requests	
Pending	0
Approved	3

Support Requests	
Open	3
Closed	1

Employee Self Service

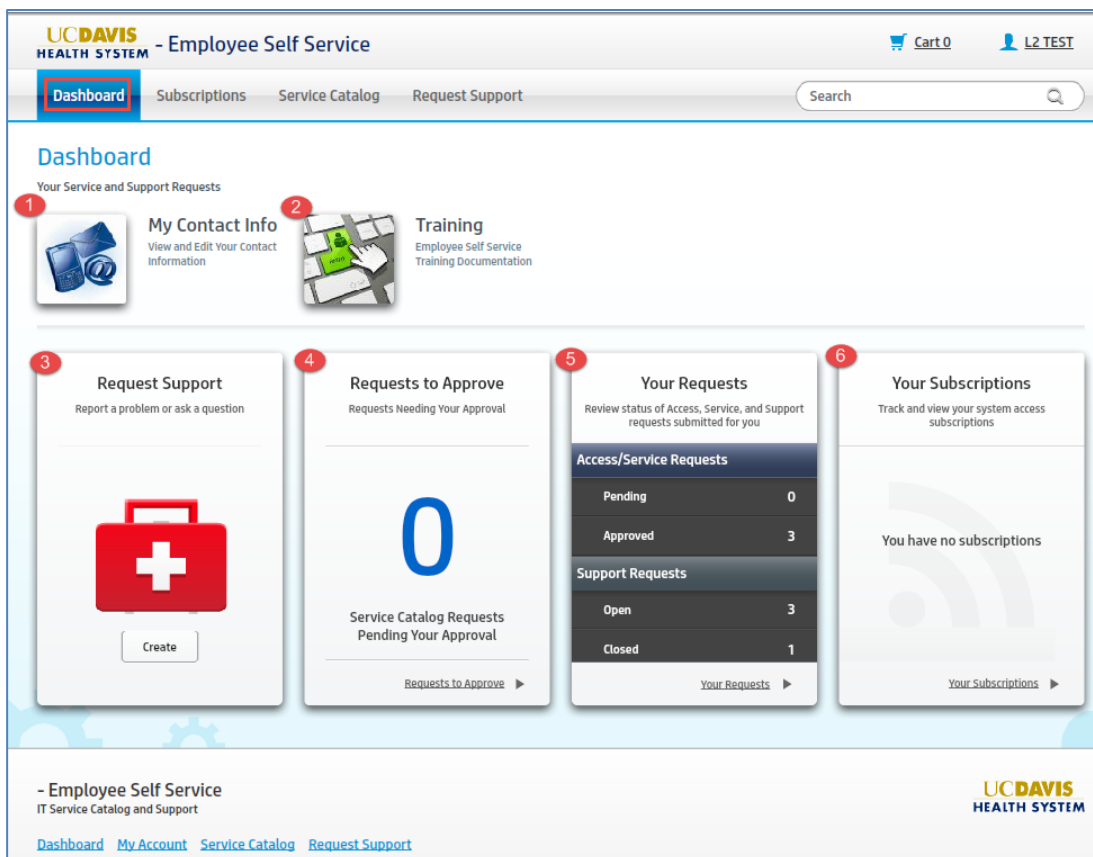
The top menu has four options:

1. [Dashboard](#)
2. [Subscriptions](#)
3. [Service Catalog](#)
4. [Request Support](#)



Dashboard

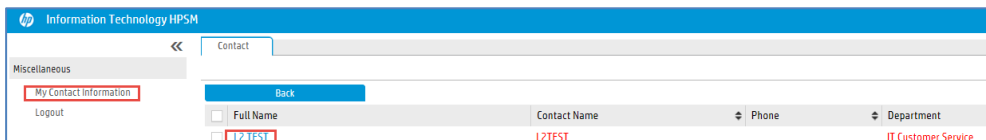
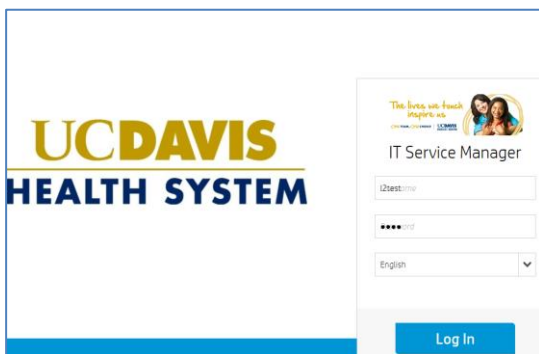
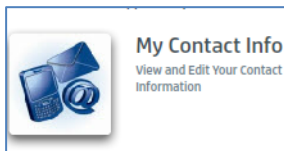
1. [My Contact Info](#) – View and Edit your Contact Information
2. [Training](#) – quick link to training documentation
3. [Request Support](#) – report a problem or ask a question
4. [Requests to Approve](#) – lists Access or Service requests that need your approval
5. [Your Requests](#) – review status of Access, Service, and Support requests submitted for you
6. [Your Subscriptions](#) – track and view your system access



My Contact Info

Updating your contact information provides IT with the most up to date information in the event we need to contact you for any requests you submit using the Employee Self Service site.

1. Click on the **My Contact Info**
2. The **IT Service Manager** log in screen appears. Enter your LAN/Active Directory username and password and click on **Log In**
3. Click on **My Contact Information**, then click on your name to edit contact information.



Contact Information Update

L2 TEST

Title

Department

Location

Phone

Cell

Pager/Provider

Alternate Phones

E-mail

Alternate Email

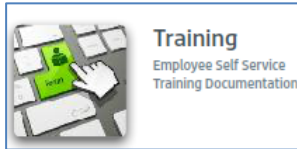
☐ Allow IT staff to view my photo for security and customer service purposes

☐ Please keep my personal information confidential

OK Cancel Save

Training

1. Click on the Training icon to access training materials.



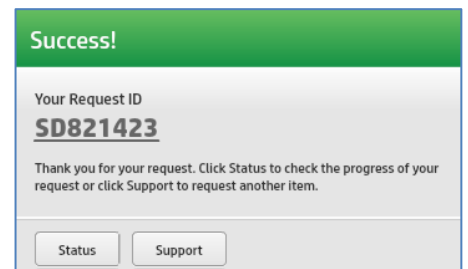
Request Support

1. To report a problem click on **Request Support**.



2. Complete the following sections then click **Submit**. The **Success** popup screen appears. The support ticket will be automatically sent over to the Technology Operations Center.
3. Click on **Status** or **Support** to exit the popup screen.

Problem Description <i>i</i> Printer will not print, Paper is not coming out <i>✓ Edit</i>	Request Support For urgent issues call 734-HELP (4357) <input type="button" value="Submit"/>
Contact Information <i>i</i> l2test, l2test, E-mail <i>✓ Edit</i>	
Computer and Location Information <i>i</i> ACC1234, ACC 1000 <i>✓ Edit</i>	
Additional Information <i>i</i> Average, CSS <i>✓ Edit</i>	
Attachments <i>i</i> <i>✓ Edit</i>	



Requests to Approve

Access or Service requests where you were selected to review and approve are listed in the **Requests to Approve** section.

1. Click on **Requests to Approve** to view the list.
2. Click on a request to view details and **Approve** or **Deny**.

Requests to Approve
Requests Needing Your Approval

92

Service Catalog Requests Pending Your Approval

Requests to Approve

Your Approvals
Items that need your approval are listed here

All
Service
Change
Quote

ID	Title	Type	Requested for	Date
SD820909	New Non-UCDHS Employee (External)	Service	mdebs	02/01/2016
SD820771	Catalog Test	Service	ESSTEST	01/21/2016
SD817301	Access Request for Kaltry Ronning- Burns/Pugh...	Service	slagala	10/16/2015
SD818402	Access for Karthi Vytheswaran	Service	gadams	10/09/2015
SD818379	Citrix Access for Student Ashley Allen	Service	hmsundia	10/09/2015
SD818134	Access for Annie Chiu	Service	bkutler	10/09/2015
SD818224	Denesia Abram	Service	mmoreno3	10/09/2015
SD818237	Joshua Bassard (SSI Department Aide) ID badge ...	Service	jortiz	10/09/2015
SD818116	Access for Timothy Kwa	Service	bkutler	10/09/2015
SD767858	Elizabeth Finhold - Professor	Service	ralexander	07/16/2015

Page 1 2 3 4 5 6 7 8 9 10
10 | 20 | 50

New Non-UCDHS Employee (External)
Return to Your Approvals

Service Details

Request placed on February 1, 2016 1:55:12 PM

New Non-UCDHS Employee (External)

Approvers
Access Support Unit (Pending)

Request Information

Cart Order Information

Contact for this request

Additional Details
COMMENT & HISTORY

Line Items
Status

New Non-UCDHS Employee (External)
Pending

ID: SD820909

APPROVE
DENY

The following pop ups will appear depending on your selection.

Confirm Approval?

Click APPROVE to confirm.
Click CANCEL to return to the previous page.

Why do you want to approve this request?
Please enter a reason here (Optional).

APPROVE
CANCEL

Are you sure?

Click DENY to deny this request.
Click CANCEL to quit.


Why do you want to deny this request?
Please enter a reason here (Required).

DENY
CANCEL


Your Requests

1. To view your existing **Access/Service or Support** requests click on **Your Requests**.
2. Click on a request to view a list of **Request IDs**.
3. Click on **View** to expand details.
4. Click on **History** to expand view status updates from IT staff.

Your Requests	
Review status of Access, Service, and Support requests submitted for you	
Access/Service Requests	
Pending	0
Approved	3
Support Requests	
Open	3
Closed	1
Your Requests ▶	




Request Inbox




Approved

3




Pending

0




Denied

0




Closed

2




Open

3



Closed

1



Check the Status of Your Requests

Hi, L2 TEST! This is your Account summary. It contains information about the status of your requests.

[Browse your Inbox to see your requests sorted by their current status.](#)

Open (3)		
Request ID	Request Name	View
SD820384	test	▶
SD820081	Access Request Service Catalog - Expedite	▶
SD818852	Access Request Analysis	▶

Open Support Request SD820081

Access Request Service Catalog - Expedite
 Request date December 4, 2015 2:41:44 PM

Requested by L2 TEST	Contact Information
Status Open - Idle	Category software
Area application	Sub-area function or feature not working

Brief Problem Title (Ex. ... Access Request Service Catalog - Expedite	Detailed Description of t... Access Request Service Catalog - Expedite
--	--

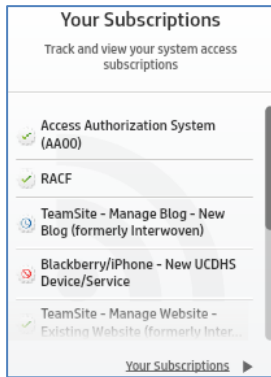
This Support Request is ... smyers3	Contact for this request L2TEST
-------------------------------------	---------------------------------

Contact Method E-mail	
-----------------------	--

Urgency Low	
-------------	--

Your Subscriptions

1. To track and view your system access subscriptions click on **Your Subscriptions**.
2. Click on a Status icon located on the right hand of the screen to expand the details of a subscription.



Your Subscriptions
Track and view your system access subscriptions

Subscriptions

Personal (selected)
Departmental

Subscription Status

All (selected)
Requested
Active
Cancellation R...
Canceled
Denied

Application/System Name	Subscriber	Approval Date	Status
Access Authorization System (AA00)	jmartinez	08/13/2015	
RACF	jmartinez	08/13/2015	
TeamSite - Manage Blog - New Blog (formerly Interwoven)	jmartinez	06/11/2015	
Blackberry/iPhone - New UCDHS Device/Service	jmartinez	05/30/2013	
TeamSite - Manage Website - Existing Website (formerly ...)	jmartinez	02/21/2013	
Badge/Cardkey - Employee ID Badge and Cardkey	jmartinez	03/30/2011	

SQL Access ← Return to Your Subscriptions

Subscription Details

Subscriber: **jmartinez**

Subscription Type: **Individual**

Associated Request:

Service SLA:

Active
Subscription Status

[Unsubscribe](#)

Subscription History
for **SQL Access**

Status	Timestamp	Notes
No change history for this subscription.		

Service Catalog

1. The **Service Catalog** tab is the gateway to the Access/Service Catalog.
2. To view Access & Service Requests Items by Category click on **Browse Catalog**
3. The **Service Assistant** is used to request access or service for another person within your organization.
4. A quick glance of **Popular Requests** submitted using the Access/Service Catalog.

UC DAVIS HEALTH SYSTEM - Employee Self Service

Dashboard Subscriptions **Service Catalog** Request Support

Search

Browse Catalog - CLICK HERE to Search for Access & Service Request Items by Category

Access/Service Catalog

Order IT goods and services. Select Browse Catalog above to browse items by category, or search for an item by clicking in the Search field in the upper-right corner.

Requests to Approve
Requests Needing Your Approval

0

Service Catalog Requests Pending Your Approval

Requests to Approve ▶

Service Assistant
Request access or service for another person in your organization.

Select Employee

Your Requests
Review status of Access, Service, and Support requests submitted for you

Access/Service Requests	
Pending	0
Approved	3
Support Requests	
Open	3
Closed	1

Your Requests ▶

Popular Requests
These are the most requested items or bundles.

Access Request

Access Termination

- Employee Self Service
IT Service Catalog and Support

UC DAVIS HEALTH SYSTEM

Access or Service Request

When using the Access/Service Catalog verify you have selected the appropriate request.

1. An Access Request is used to request an account to log into an application, access to a shared drive, or badge/cardkey access.



2. A Service Request is use to request a new laptop, software installation, or voice services.



Access Request

The following 11 sections will guide you through different types of Access requests in the Access/Service Catalog.

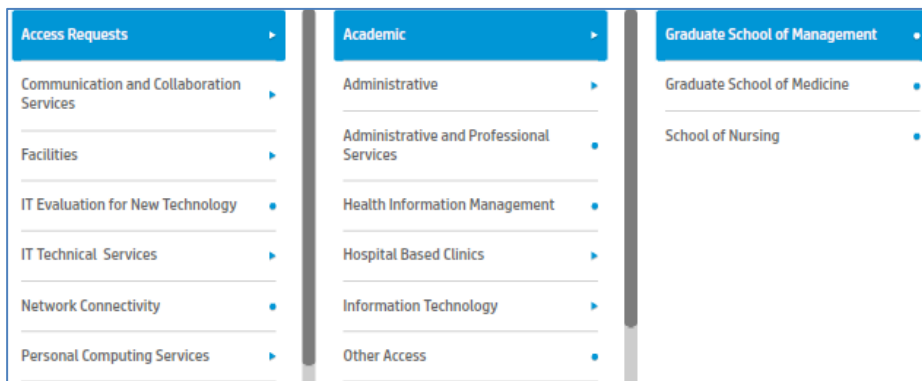
1. [Access Request for Me - one Catalog Item](#)
2. [Access Request for Me - multiple Catalog Items](#)
3. [Access Request for another Employee](#)
4. [Access Request using a Bundle](#)
5. [Access Request for a New Campus Employee](#)
6. [Access Request for a New External Employee](#)
7. [Access Request for a Group of Employees](#)
 - a. [Batch Process #1](#)
 - b. [Batch Process #2](#)
8. [Access Request Termination](#)
9. [External Employee Termination](#)
10. [Access Request Transfer Departments](#)
11. [Access Request for Name Change](#)

Access Request for Me - one Catalog Item

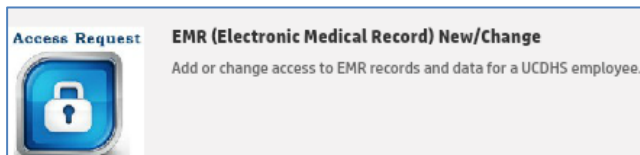
1. Click Browse Catalog.

[+ Browse Catalog - CLICK HERE to Search for Access & Service Request Items by Category](#)

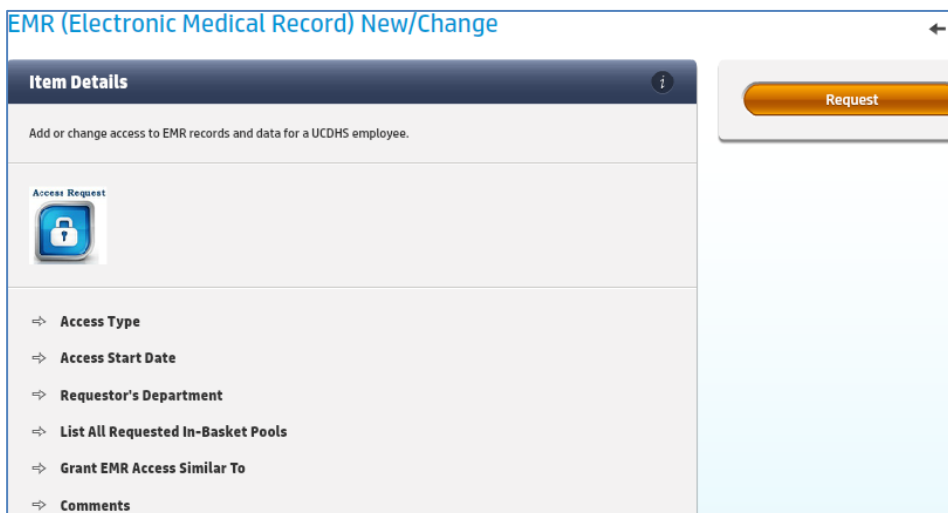
2. Click the Parent category **Access Requests**.
3. Now select the appropriate secondary category. For this example, select **Academic**.
4. Now select the **Graduate School of Management** tertiary category.



5. A list of access request catalog items appear. For this example, click on **EMR (Electronic Medical Record) New/Change**.



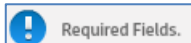
6. The Item Details screen appears with a list of information needed to submit the request. Click on **Request**.



7. The **Order Information** screen appears. Click on **Next**.

The screenshot shows the 'EMR (Electronic Medical Record) New/Change' window. The 'Order Information' section is active. It contains a text box with 'l2test', a search icon, an edit icon, and an information icon. Below the text box is a 'Required Fields.' message with an exclamation mark icon. At the bottom right is a 'Next' button with a right arrow.

8. From the **Item Options** section, complete the **required fields** which will have this icon next to each field.



9. A **green** checkmark will appear when each field is completed.



10. Click **Next**.

The screenshot shows the 'Item Options' section of the EMR system. It includes several fields with green checkmarks indicating completion: 'Access Type' (radio buttons for 'New access' and 'Change to existing access'), 'Access Start Date' (text box with '03/01/2016' and a calendar icon), 'Requestor's Department' (text box with 'Emergency Medicine - H 1009740'), 'List All Requested In-Basket Pools' (text box with 'ER pools'), and 'Grant EMR Access Similar To' (text box with 'rdtest user - rdtestuser'). Each field has a green checkmark icon to its right. At the bottom, there is a 'Comments' text box and a 'Required Fields.' message. A 'Next' button with a right arrow is at the bottom right.

11. Click on **Request Now**.

12. The **Verify Delivery Information** screen appears. Complete the required fields. Add any necessary attachments.

a. **Approver Information** is usually a supervisor, manager, or designated person from your department.

13. Click **Next**.

14. Click **Submit** and the **Success** popup appears. Your request has successfully been submitted to IT.

15. Click on **Status** or **Support** to exit the popup screen.

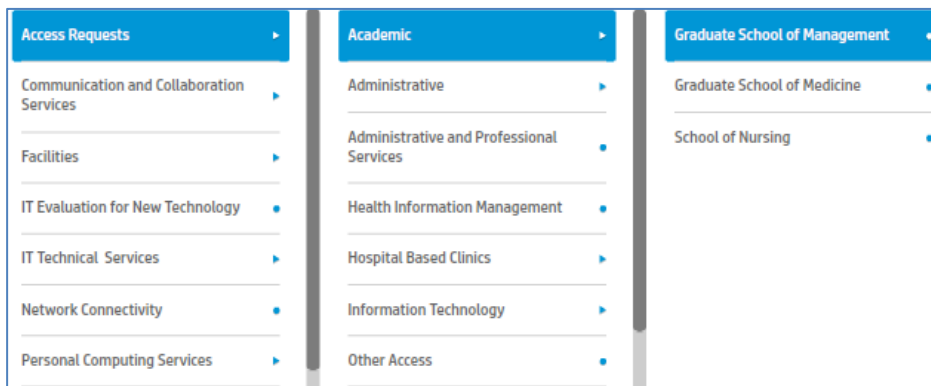
Back to **Access Request** types click [here](#)

Access Request for Me - Multiple Catalog Items

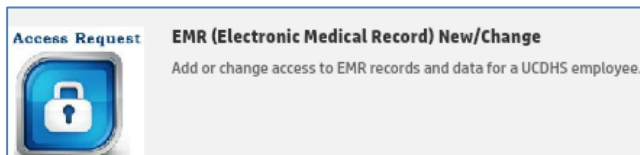
1. Click Browse Catalog.

[+ Browse Catalog - CLICK HERE to Search for Access & Service Request Items by Category](#)

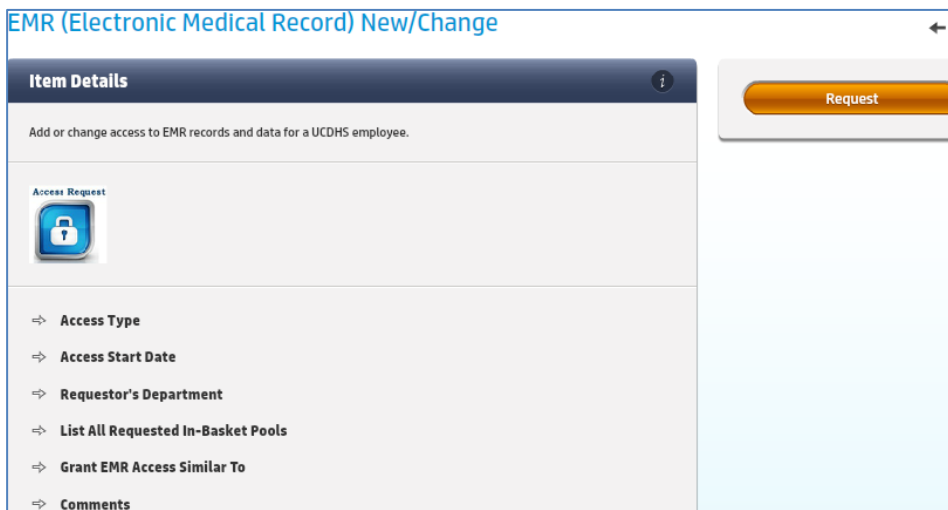
2. Click the Parent category **Access Requests**.
3. Now select the appropriate secondary category. For this example, select **Academic**.
4. Now select the **Graduate School of Management** tertiary category.



5. A list of access request catalog items appear. For this example, click on **EMR (Electronic Medical Record) New/Change**.



6. The Item Details screen appears with a list of information needed to submit the request. Click on **Request**.



- The **Order Information** screen appears. Click on **Next**.

EMR (Electronic Medical Record) New/Change

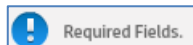
Order Information ⓘ

This request is for: (**IMPORTANT**: If you are requesting access or service on behalf of someone else WITH AN EXISTING ACCOUNT and his/her name is not displaying below, then please exit out of this request and use the Service Assistant widget located under the Service Catalog area to look up and select that person from the list)

l2test 🔍 ✎ !

! Required Fields. ▶ **Next**

- From the **Item Options** section, complete the **required fields** which will have this icon next to each field.



- A **green** checkmark will appear when each field is completed.



- Click **Next**.

Item Options ⓘ

Access Type

☒ New access ✓

☐ Change to existing access

Access Start Date

03/01/2016 📅 ▶ ✓

Requestor's Department

Emergency Medicine - H 1009740 🔍 ✎ ✓

List All Requested In-Basket Pools

ER pools ✓

Grant EMR Access Similar To

rdstest user - rdstestuser 🔍 ✎ ✓

Comments

⏏

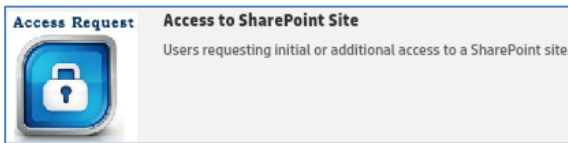
! Required Fields. ▶ **Next**

11. Click on **Add To Cart**

12. The **EMR** catalog item is now in your **Shopping Cart**. From this screen you have the following options:
- Edit items in cart
 - Remove items in cart
 - Submit Cart

13. To add another item to your **Shopping Cart** do one of the following:
- Enter application name in the **Search** field located in the right corner
 - Click on **Browse Catalog** to see a list of items

14. Search for another catalog item. For this example, select **Access to SharePoint Site**.



15. From the **Item Details** click on **Request** to complete the form.



16. Complete the **Order Information**

17. Click **Next**



18. Complete the **Item Options**

19. Click **Next**.

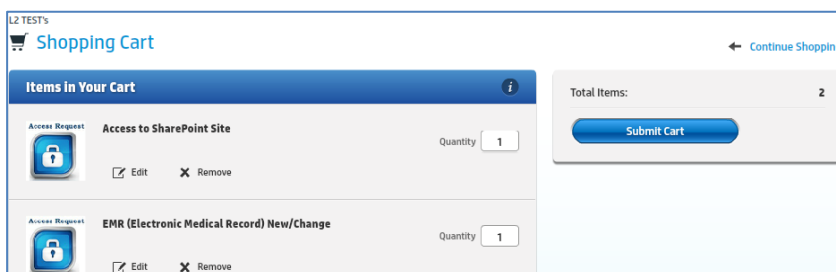


20. Click **Add to Cart**.



21. The catalog item is now in your **Shopping Cart**. You can continue these steps to add multiple access catalog items to your **Shopping Cart**.

22. Click **Submit Cart** to complete this request.



16. The **Verify Delivery Information** screen appears. Complete the required fields. Add any necessary attachments.
17. Click **Next**.

Verify Delivery Information

Cart Order Information

Brief Cart Title (Ex. Access for John Doe)

Detailed Description of Cart Request

Required Fields. [Next](#)

Contact for this request

This task depends on the results of the previous task.

Approver Information

This task depends on the results of the previous task.

Telephone Information

This task depends on the results of the previous task.

Attachments

This task depends on the results of the previous task.

18. Click **Submit** and the **Success** popup appears. Your request has successfully been submitted to IT.
19. Click on **Status** or **Support** to exit the popup screen.

Cart Order Information

Need access to EMR, Add any other details about your request here. [Edit](#)

Contact for this request

2test, E-mail [Edit](#)

Approver Information

Andrew J. McDowell - amcdowell [Edit](#)

Telephone Information

4-4422 [Edit](#)

Attachments

Total Items: 1

[Submit](#)

Success!

Your Request ID

SD821196

Thank you for your request. Click Status to check the progress of your request or click Services to request another item.

[Status](#) [Services](#)

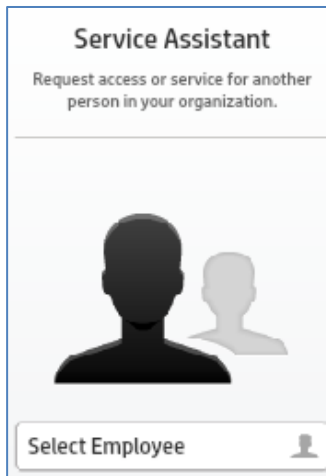
Back to **Access Request** types click [here](#)

Access Request for another Employee

Some departments designate an employee to submit all requests. In order to request access for another person within your organization you will need to select the employee using the **Service Assistant**.

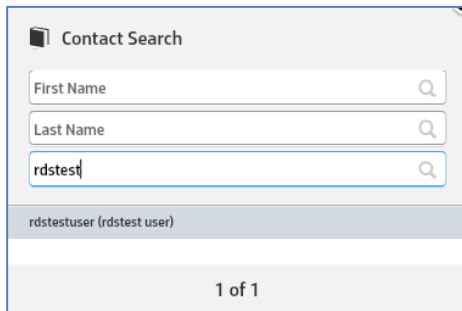
The Service Assistant is located on the **Service Catalog** tab below the **Access/Service Catalog** section.

1. Click on **Select Employee**.



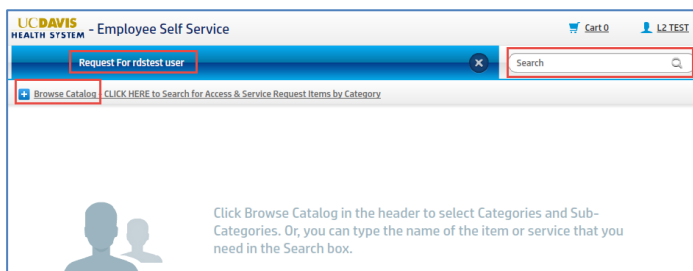
The Service Assistant interface is a rectangular box with a light blue border. At the top, it has the title "Service Assistant" in bold. Below the title is a subtitle: "Request access or service for another person in your organization." In the center, there is a graphic of two stylized human silhouettes, one in black and one in light gray. At the bottom, there is a button labeled "Select Employee" with a small person icon to its right.

2. Search for employee by typing any of the following search criteria:
 - a. First and Last name
 - b. Contact name which is the employee's LAN/Active Directory login name



The Contact Search interface is a rectangular box with a light gray border. It has a title "Contact Search" with a magnifying glass icon. Below the title are three search input fields: "First Name", "Last Name", and "rdstest". Each field has a magnifying glass icon to its right. Below the input fields, there is a search result: "rdstestuser (rdstest user)". At the bottom, it says "1 of 1".

3. The employee's name is listed at the top of the screen.



The Employee Self Service interface is a rectangular box with a light blue border. At the top, it has the title "UC DAVIS HEALTH SYSTEM - Employee Self Service". Below the title is a blue header bar with a search box containing "Request For rdstest user" and a magnifying glass icon. Below the header bar, there is a link "Browse Catalog" and a text box "CLICK HERE to Search for Access & Service Request Items by Category". At the bottom, there is a graphic of two stylized human silhouettes and a text box: "Click Browse Catalog in the header to select Categories and Sub-Categories. Or, you can type the name of the item or service that you need in the Search box."

4. To add access catalog items to the cart you have two options:
 - a. Enter application name in the **Search** field then select the item
 - b. Click on **Browse Catalog** to see a list of items

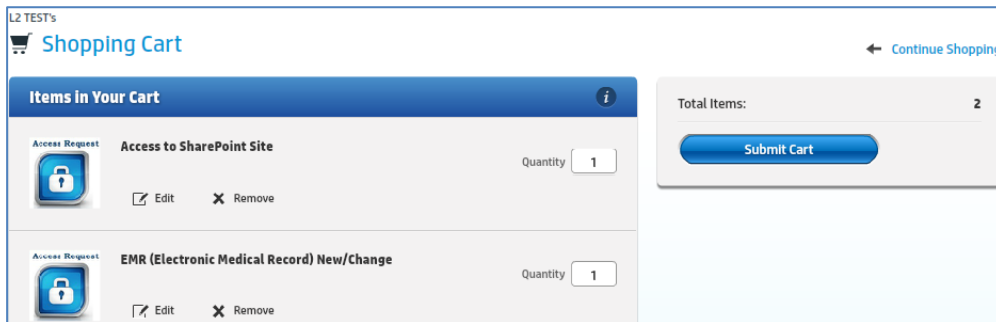
5. After selecting a catalog item click on **Request** to complete the form from the **Item Details**.

6. Complete the **Order Information**
7. Click **Next**

8. Complete the **Item Options**
9. Click **Next**.

10. Click **Add to Cart**.

11. The catalog item is now in your **Shopping Cart**. You can continue these steps to add multiple access catalog items to your **Shopping Cart**.
12. Click **Submit Cart** to complete this request.



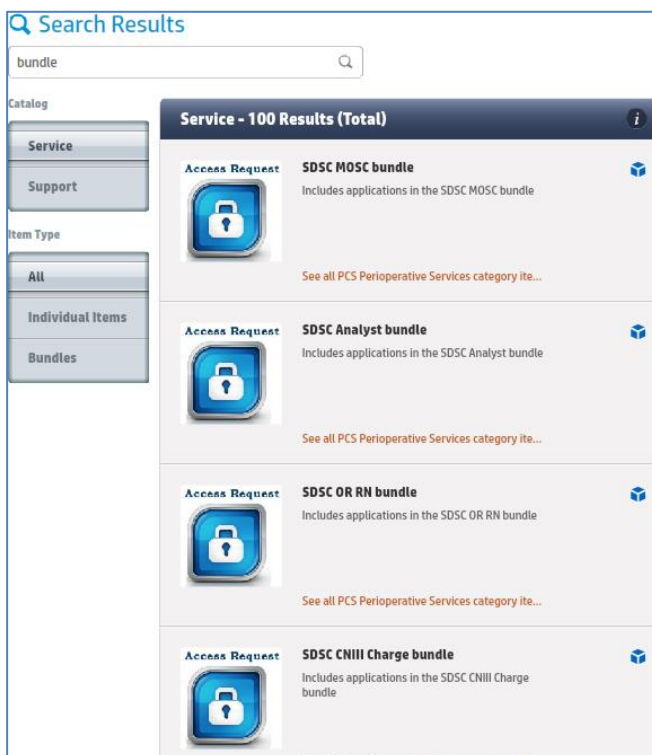
Access Request using a Bundle

Access Request Bundles contain a group of catalog items. These bundles provide an easier way of submitting requests for new employees.

1. To search for a bundle enter the bundle name in the **Search** field
2. If you do not know the name enter **bundle** in the **Search** field



3. A list of 100 results appear. Select the appropriate bundle. For this example, select SDSC OR RN bundle.



- The **Item Details** screen appears and lists the access catalog items that are part of this bundle. Click on **Request**.

SDSC OR RN bundle [← Back to previous page](#)

Item Details ⓘ

Includes applications in the SDSC OR RN bundle

Access Request

→ **Active Directory (Formerly LAN Access, Citrix) (Optional)**
 Active Directory is used to gain access to the UCdHS network.
Active Directory was formerly requested as LAN Access.

→ **ID Badge and/or Cardkey Request (Optional)**
 New/Rehire, Replacement or any Change to Badge/Cardkey access

→ **EMR (Electronic Medical Record) New/Change (Optional)**
 Add or change access to EMR records and data for a UCdHS employee.

→ **IMAGES (Radiology) (Optional)**
 Radiology System

→ **PYXIS Meds Dispense (Optional)**
 Drug dispensing system.

→ **Vocera Access (Optional)**
 A nearly hands-free voice over intranet communication, used by most mobile staff throughout the hospital.

Request

- From the **Order Information** screen click **Next** to begin adding information for each catalog item.

SDSC OR RN bundle

Order Information ⓘ

This request is for: (**IMPORTANT**: If you are requesting access or service on behalf of someone else WITH AN EXISTING ACCOUNT and his/her name is not displaying below, then please exit out of this request and use the Service Assistant widget located under the Service Catalog area to look up and select that person from the list)

l2test

Required Fields. [Next](#)

Active Directory (Formerly LAN Access, Citrix) ⓘ

This task depends on the results of the previous task.

ID Badge and/or Cardkey Request ⓘ

This task depends on the results of the previous task.

EMR (Electronic Medical Record) New/Change ⓘ

This task depends on the results of the previous task.

IMAGES (Radiology) ⓘ

This task depends on the results of the previous task.

PYXIS Meds Dispense ⓘ

This task depends on the results of the previous task.

Vocera Access ⓘ

This task depends on the results of the previous task.

6. If the employee does not need one of the catalog items within the bundle, simply uncheck **Include this item**, otherwise continue to complete each section and click **Next**.
7. Click on **Request Now**.

SDSC OR RN bundle

[Return to Service Details](#)

Order Information

I2test [Edit](#)

Active Directory (Formerly LAN Access, Citrix)

Include this item [Edit](#)

ID Badge and/or Cardkey Request

☒ **Include this item**

Please select the appropriate Employee Type

☐ UCDHS Employee

Quantity: 1

[Add to Cart](#)

[Request Now](#)

Quantity: 1

[Add to Cart](#)

[Request Now](#)

8. The **Verify Delivery Information** screen appears. Complete the required fields. Add any necessary attachments.
9. Click **Next**.

Verify Delivery Information

Cart Order Information

Brief Cart Title (Ex. Access for John Doe)

Access for L2 Test ✓

Detailed Description of Cart Request

Add any other details about your request here. ✓

Required Fields. [Next](#)

Contact for this request

This task depends on the results of the previous task.

Approver Information

This task depends on the results of the previous task.

Telephone Information

This task depends on the results of the previous task.

Attachments

This task depends on the results of the previous task.

10. Click **Submit** and the **Success** popup appears. Your request has successfully been submitted to IT.
11. Click on **Status** or **Support** to exit the popup screen.

Back to **Access Request** types click [here](#)

Access Request for a New Campus Employee

UC Davis Campus employees may need access to the UC Davis Health System network or applications. A specific catalog item has been created for this type of employee.

1. From the **Service Catalog** tab type into the **Search** field **Campus Employee**.

2. The **Search Results** lists the following catalog item:
 - a. **Active Directory Account for UCD Campus Employee or UCD Student**
3. Select this request.

- From the **Item Details** screen click on **Request**.


Active Directory Account for UCD Campus Employee or UCD Student [← Back to previous page](#)

Item Details

Use this Catalog Item to request a Sacramento Medical Center Active Directory Account for a UC Davis Campus Employee or UCD Student.

IMPORTANT: This is only for UC Davis Campus Employees or UCD Students that you are unable to locate in the Service Assistant lookup under the Service Catalog button.

Access Request



→ Please lookup and select the UCD Campus Employee or UCD Student for whom you need a U...

→ Employee or Student Title

→ UCDHS Department

→ UCDHS Supervisor/Approver




Request


- From the **Order Information** section click on **Next**.

Active Directory Account for UCD Campus Employee or UCD Student

Order Information

This request is for: (**IMPORTANT**: If you are requesting access or service on behalf of someone else WITH AN EXISTING ACCOUNT and his/her name is not displaying below, then please exit out of this request and use the Service Assistant widget located under the Service Catalog area to look up and select that person from the list)




  

 Required Fields. [▶ Next](#)


- From the **Item Options** section, complete the required fields and click on **Next**.
- Click **Request Now**.

Item Options




Please lookup and select the UCD Campus Employee or UCD Student for whom you need a UCDHS computer access (Active Directory) account created.




Employee or Student Title




UCDHS Department

UCDHS Supervisor/Approver

 Required Fields. [▶ Next](#)

Quantity

[Add to Cart](#)

[Request Now](#)

8. The **Verify Delivery Information** screen appears. Complete the required fields. Add any necessary attachments.
9. Click **Next**.

Verify Delivery Information

Cart Order Information

Brief Cart Title (Ex. Access for John Doe)

Detailed Description of Cart Request

Add any other details about your request here.

Required Fields. [Next](#)

Contact for this request

This task depends on the results of the previous task.

Approver Information

This task depends on the results of the previous task.

Telephone Information

This task depends on the results of the previous task.

Attachments

This task depends on the results of the previous task.

10. Click **Submit** and the **Success** popup appears. Your request has successfully been submitted to IT.
11. Click on **Status** or **Support** to exit the popup screen.

Cart Order Information

Need access to EMR, Add any other details about your request here. [Edit](#)

Contact for this request

Ztest, E-mail [Edit](#)

Approver Information

Andrew J. McDowell - amcdowell [Edit](#)

Telephone Information

4-4422 [Edit](#)

Attachments

Total Items: 1

[Submit](#)

Success!

Your Request ID
SD821198

Thank you for your request. Click Status to check the progress of your request or click Services to request another item.

[Status](#) [Services](#)

Back to **Access Request** types click [here](#)

Access Request for a New External Employee

To better manage the identities of external employees and prevent duplicate accounts at UC Davis Health System (UCDHS) we are implementing changes to the onboarding process of external UCDHS employees.

The purpose of these changes is to manage external employees by using the Identity and Access Management (IAM) system used for internal UCDHS employees, UCD Campus Employees and UCD Campus Students.

These changes apply to external employees that need a network login (Active Directory/Citrix login) and/or UC Davis email.

These changes will also replace the Online [TAF](#) (Temporary Affiliate Form)

Some of the most common external employee types are:

- Contractor
- Consultant
- Staff from Temp Agency
- Volunteers
- Non-UCD Students
- Visiting/Rotating Residents
- Outside/Locum Physician

1. Begin the request by typing External into the **Search** field.

The screenshot displays the UC Davis Health System Employee Self Service portal. At the top, the header includes the UC Davis Health System logo and the text "Employee Self Service". A shopping cart icon shows "Cart 0" and a user profile icon shows "L2 TEST". Below the header is a navigation bar with tabs: "Dashboard", "Subscriptions", "Service Catalog" (selected), and "Request Support". A search bar on the right contains the text "External".

Below the navigation bar is a link: "+ Browse Catalog - CLICK HERE to Search for Access & Service Request Items by Category". The main content area is titled "Access/Service Catalog" with a subtitle: "Order IT goods and services. Select Browse Catalog above to browse items by category, or search for an item by clicking in the Search field in the upper-right corner."

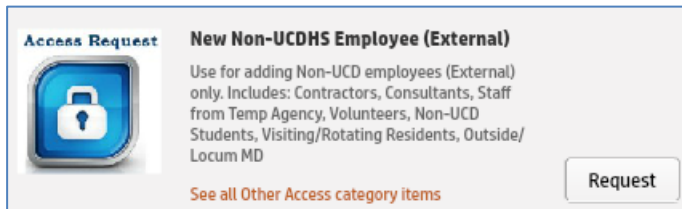
The main content area is divided into four columns:

- Requests to Approve:** "Requests Needing Your Approval". It shows a large blue "0" and the text "Service Catalog Requests Pending Your Approval". A link "Requests to Approve" is at the bottom.
- Service Assistant:** "Request access or service for another person in your organization." It features a silhouette of a person and a "Select Employee" button with a person icon.
- Your Requests:** "Review status of Access, Service, and Support requests submitted for you". It contains a table:

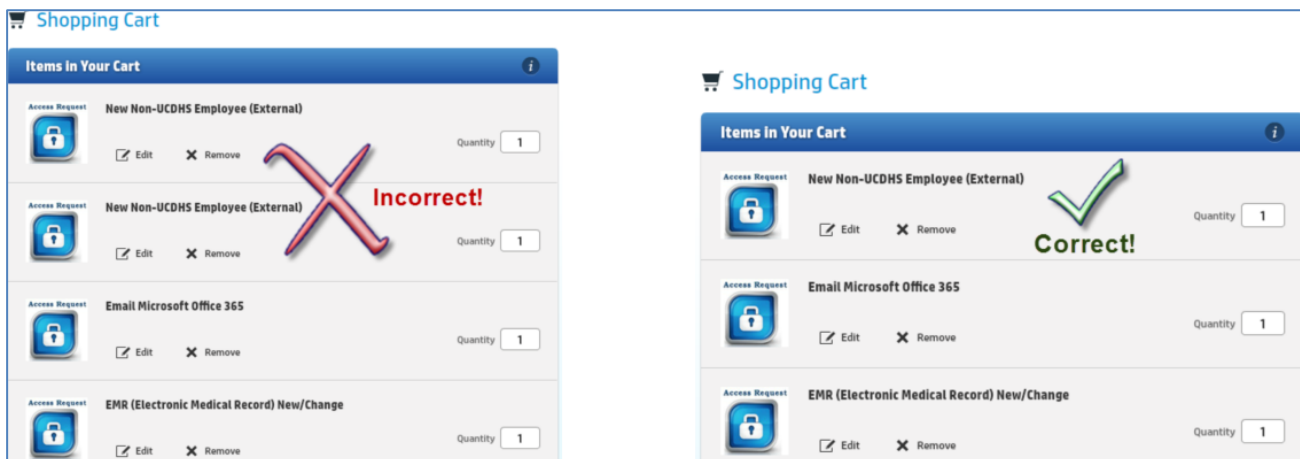
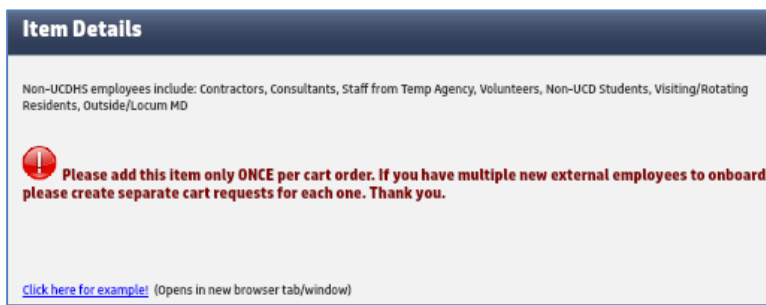
Access/Service Requests	
Pending	4
Approved	3
Support Requests	
Open	3
Closed	1

 A link "Your Requests" is at the bottom.
- Popular Requests:** "These are the most requested items or bundles." It features a large blue padlock icon and the text "Access Request". Below it is a link "Access Termination".

2. Scroll through the Search Results and select **New Non-UCDHS Employee (External)** catalog item.



3. The Item Details screen appears. It's important to use this particular access request catalog item for one external employee. If you have multiple new external employees that need access you will need to create a separate request for each external employee. By selecting the link **Click here for example** you can see a snapshot of the incorrect and correct way to use this catalog item.



- There are several pieces of information needed for external employees. Once you have reviewed this list, click on **Request**.

Item Details

Non-UCDHS employees include: Contractors, Consultants, Staff from Temp Agency, Volunteers, Non-UCD Students, Visiting/Rotating Residents, Outside/Locum MD

! Please add this item only **ONCE** per cart order. If you have multiple new external employees to onboard, please create separate cart requests for each one. Thank you.

[Click here for example!](#) (Opens in new browser tab/window)

Access Request

Hi! Lets verify if the external employee has an existing account by performing a search be...

Did you locate the external employee in the above search field?

Stop! Please do not use this item! The external employee is already in the system. Please e...

Please select the primary work location for this external employee

Does this user require a LAN Account? (Citrix or Active Directory Account)

First Name

Middle Name

Last Name

Email Address (Please enter only one Email Address)

Please re-enter Email Address

Email Addresses Do not match!!

Phone (Ex. 916-555-5555)

Job Title

Building

Start Date

End Date

Contract PO#

UCDHS Supervisor

UCDHS Department/Cost Center

Please select your Employer from the list provided. If your employer is not available for se...

If you do not see the name of your employer in the list above, please enter the name here. ...

Added Employer Address

Added Employer City

Added Employer State

Added Employer Zip Code

Added Employer Country

Employer Supervisor

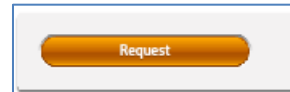
Employer Supervisor Email Address

If you are a student, please provide the school you are currently attending

First and Last Name of School Coordinator

School Coordinator's Email Address (enter only one address)

If other Access is needed such as Email or VPN please select the "Add to Cart" button on th...



- From the **Order Information** screen click on **Next**.

New Non-UCDHS Employee (External)

Order Information

This request is for: (**IMPORTANT**: If you are requesting access or service on behalf of someone else WITH AN EXISTING ACCOUNT and his/her name is not displaying below, then please exit out of this request and use the Service Assistant widget located under the Service Catalog area to look up and select that person from the list)

l2test

Required Fields. **Next**

- Before you move forward verify the external employee does not have an existing account. Click in the blank field and a pop up will appear.

Item Options

Verify employee does not already have an existing account by performing a search below

Did you locate the employee in the above search field?

Select one

Required Fields. **Next**

- Enter the external employee name.

test				
Full Name	Contact Name	Phone	Department	Account Active?
Andrew Mcdowelltest	amcdowelltest	916-213-0902	Adult IV Infusion Center	true
Altiris T.	atest			true

- If you were able to find the external employee, select Yes and a notice will appear indicating to stop and not use this catalog item. Instead access the [Service Assistant](#) to submit your request.

Did you locate the employee in the above search field?

Yes

Stop! Please do not use this item! The employee is already in the system. Please exit this item and use the Service Assistant widget located under the Service Catalog section

Required Fields. **Next**

9. If you did not find the external employee, select **No** to move forward to begin entering the necessary information for this request.

Did you locate the employee in the above search field?

No

Stop! Please do not use this item! The employee is already in the system. Please exit this item and use the Service Assistant widget located under the Service Catalog section

Required Fields. [Next](#)

10. Click on Yes or No if the person requires a LAN Account (Citrix or Active Directory Account)

Does this user require a LAN Account? (Citrix or Active Directory Account)

☐ Yes

☐ No

11. The **Item Options** screen will appear, complete all required fields and click **Next**.

First Name

Middle Name

Last Name

Email Address (Please enter only one Email Address)

Please re-enter Email Address

Phone (Ex. 916-555-5555)

Job Title

Building

Start Date

End Date

Contract POB

UCDS Supervisor

UCDS Department/Cost Center

Please select your Employer from the list provided. If your employer is not available for selection, please enter the name of your employer below.

If you do not see the name of your employer in the list above, please enter the name here. In addition to adding the employer name, the demographic details are to be included below.

Added Employer Country

Employer Supervisor

Employer Supervisor Email Address

If you are a student, please provide the school you are currently attending

If other Access is needed such as Email or VPN please select the "Add to Cart" button on the next screen and continue shopping.

12. Click on Add to Cart to add more access catalog items for your external employee or click Request.

New Non-UCDHS Employee (External) ← Return to Service Detail

Order Information i l2test Edit	Quantity: 1 Add to Cart Request Now
Item Options i No, Contractor/Consultant/Vendor Offsite, John, C. James, j.james@gmail.com, (916) 734-2011, Purchasing... Edit	

13. The **Verify Delivery Information** screen appears. Complete the required fields. Add any necessary attachments.

14. Click **Next**.

Verify Delivery Information

Cart Order Information i Brief Cart Title (Ex. Access for John Doe) Access for L2 Test ✓ Detailed Description of Cart Request Add any other details about your request here. ✓ Required Fields. Next
Contact for this request i This task depends on the results of the previous task.
Approver Information i This task depends on the results of the previous task.
Telephone Information i This task depends on the results of the previous task.
Attachments i This task depends on the results of the previous task.

15. Click **Submit** and the **Success** popup appears. Your request has successfully been submitted to IT.

16. Click on **Status** or **Support** to exit the popup screen.

Cart Order Information i Need access to EMR, Add any other details about your request here. Edit	Total Items: 1 Submit
Contact for this request i l2test, E-mail Edit	
Approver Information i Andrew J. McDowell - amcdowell Edit	
Telephone Information i 4-4422 Edit	
Attachments i	

Success!

Your Request ID
SD821202

Thank you for your request. Click Status to check the progress of your request or click Services to request another item.

Status
Services

Additional Information for External Employee Requests


- The order information will default to the submitters name by default for the request. This will automatically change when the account is created.
- Be sure to identify the Non-UCDHS Employee's name in the Title and details of the cart in the Description field. For example: Requesting EMR, Badge/Cardkey, and Images for External - John Jones.
- Make sure Contact for this request stays as the requestor.
- Approver has to be an approving supervisor or manager.
- The Telephone number can be different than the contact, but should be valid.

Access Request for a Group of Employees

The Access/Service Catalog has two batch load processes which allows customers to request access for several employees within one request. Please read the steps below before moving forward with your request. If you have any questions contact the IT Access Team at 916-734-4357 for assistance.

Batch Load Process - #1

1. Use the **Access Request batch load for 20 or Less Existing Employees** for 20 or less existing employees. This catalog item can only be added to the cart once per request, see example below



Access Request




Access Request batch load for 20 or Less Existing Employees

Select this item when applying the same catalog item(s) requesting access for up to 20 existing employees.

[See all Other Access category items](#)




Shopping Cart

Items in Your Cart

	Access Request batch load for 20 or Less Existing Employees	Quantity 1	 Incorrect
	Access Request batch load for 20 or Less Existing Employees	Quantity 1	

Shopping Cart

Items in Your Cart

	ID Badge and/or Cardkey Request	Quantity 1	 Correct
	Access Request batch load for 20 or Less Existing Employees	Quantity 1	

2. When you select the catalog item the **Item Details** screen appears with important steps to follow before you click on **Request**.

Access Request batch load for 20 or Less Existing Employees

[Back to previous page](#)


Item Details

Select this item when applying the same catalog item(s) to 20 or fewer employees. (NOTE: All employees must have existing active accounts in the access system)

*****PLEASE READ THE FOLLOWING INSTRUCTIONS BEFORE PROCEEDING*****

Instructions:

1. Complete this item selecting up to 20 employees in the Item Options section.
2. When completed, select Add to Cart option.
3. Search for additional access items from the catalog and select Add to Cart. (****IMPORTANT****: You must add at least one item to the cart in addition to the Batch Catalog Processing Item)
4. When you are finished adding access request items to the cart, select the Submit Cart button and complete the cart information sections.
5. After submitting your cart order, the system will then generate a separate request for each employee listed in the Batch Catalog Processing item.



⇒ Please enter the number of employees you want to include in the batch request (between ...

⇒ Requested For #1


⇒ Requested For #2

⇒ Requested For #3




Request


3. The **Order Information** screen appears click **Next**.

Access Request batch load for 20 or Less Existing Employees


Order Information 

This request is for: (**IMPORTANT**: If you are requesting access or service on behalf of someone else WITH AN EXISTING ACCOUNT and his/her name is not displaying below, then please exit out of this request and use the Service Assistant widget located under the Service Catalog area to look up and select that person from the list)


  

 Required Fields. ▶ **Next**


4. The **Item Options** screen appears asking for the total number of employees you want to include on this request. If you enter a number less than two the following message will appear.
 - a. Error – *This value must be greater than or equal to 2.*

Item Options 


Please enter the number of employees you want to include in the batch request (between 2 and 20)




This value must be greater than or equal to 2.

 Required Fields. ▶ **Next**




5. Whichever number you enter between 2 and 20 the following fields will appear to search and add each existing employee's name. In the example below the number four is entered, therefore four 'Requested For' fields appear. Once the employee names are added click **Next**.

Item Options 




Please enter the number of employees you want to include in the batch request (between 2 and 20)






Requested For #1




Requested For #2


  

Requested For #3

Requested For #4

 Required Fields. ▶ **Next**

6. Click **Add to Cart**.

7. Now click **Continue Shopping** or simply use the **Search** field to add additional catalog items for these four employees.

8. Once you have finished adding additional catalog items click **Submit Cart**.

9. Complete the **View Delivery Information** screen and click Submit. The **Success** popup appears. Your request has successfully been submitted to IT.
10. Click on **Status** or **Support** to exit the popup screen.

Verify Delivery Information

Cart Order Information
i

EMR and Images access for new students, EMR and Images access for new students

Edit

Contact for this request
i

i2test, E-mail

Edit

Approver Information
i

Joliene C. Martinez - jmartinez

Edit

Telephone Information
i

44444

Edit

Attachments
i

Edit

Total Items: 3

Submit

Success!

Your Request ID
SD821406

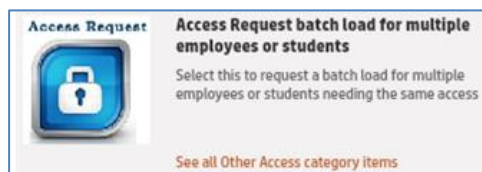
Thank you for your request. Click Status to check the progress of your request or click Services to request another item.

Status

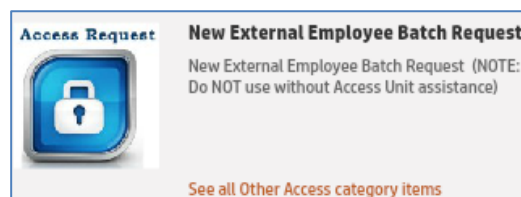
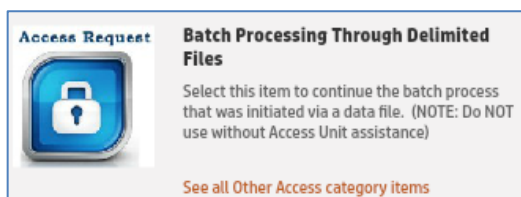
Services

Batch Load Process - #2

1. The catalog item **Access Request batch load for multiple employees or students** is used for more than 20 existing employees or students. You have a couple of options:
 - a. Use [Batch Load Process #1](#) (20 or less per cart order more than once):
 - i. For example when you have 30 employees: use one cart of 20 and submit the request then start a new request for 10 more employees.
 - b. Select the following catalog item and submit by itself.



- c. For the two catalog items below an IT access team member will contact you when one of the the **Access Request batch load for multiple employees or students** catalog item above has been submitted. *Please do not use these two catalog items below without assistance from our IT Access Team.*



- When you select the **Access Request batch load for multiple employees or students** catalog item the **Item Details** screen appears with important steps to follow before you click on **Request**.

Access Request batch load for multiple employees or students [← Back to previous page](#)

Item Details

Select this to request a batch load for multiple employees or students needing the same access.

The request can be for one of the following types:

1. UCD Campus Employees or UCD Students needing Active Directory accounts OR
2. New External employees (ex. contractors, vendors, temp employees, etc.) OR
3. For more than 20 existing employees that already have active network accounts (i.e. Active Directory accounts)

NOTE: If you have 20 or less existing employees you would like to process in a batch, please exit this item and search for and select the "Access Request batch load for 20 or Less Existing Employees" item; **being sure to follow the instructions carefully.**

Access Request

⇒ Please select the employee type for the batch load

⇒ Please list the systems each employee will need access to (ex. EMR, Badge/Cardkey, etc.)

⇒ After submitting this request, the appropriate batch load template will be emailed to you f...

Request

- The **Order Information** screen appears click **Next**.

Access Request batch load for multiple employees or students

Order Information

This request is for: (***IMPORTANT***: If you are requesting access or service on behalf of someone else **WITH AN EXISTING ACCOUNT** and his/her name is not displaying below, then please exit out of this request and use the Service Assistant widget located under the Service Catalog area to look up and select that person from the list)

Required Fields. [▶ Next](#)

4. Select the appropriate employee type:
 - a. New External Employee
 - b. Existing Employees
 - c. UCD Campus Employee or UCD Student
5. Enter the list of systems each employee will need access to
6. Check the box below to receive an email from the IT Access Team with a batch load template which will be used to add additional information.
7. Click Next.

Item Options

Please select the employee type for the batch load

☒ New External Employees (i.e. Contractors, Vendors, etc.)
 ☐ Existing Employees needing additional access
 ☐ UCD Campus Employee or UCD Student

Please list the systems each employee will need access to (ex. EMR, Badge/Cardkey, etc.)

EMR, Badge , Cardkey, Images

☒ After submitting this request, the appropriate batch load template will be emailed to you for completion. Once completed and returned, the list will be imported into the system. A representative from the Access Unit will then contact you to assist you in building and submitting the batch load cart order.

Required Fields.

Next

8. Click **Request Now**.

Access Request batch load for multiple employees or students

Return to Service Detail

Order Information

l2test

Edit

Item Options

New External Employees (i.e. Contractors, Vendors, etc.), EMR, Badge , Cardkey, Images, After submitting th...

Edit

Quantity

1

Add to Cart

Request Now

9. Complete the **View Delivery Information** screen and click Submit. The **Success** popup appears. Your request has successfully been submitted to IT.
10. Click on **Status** or **Support** to exit the popup screen.

Verify Delivery Information

Cart Order Information
i

Access for external employees, Access for external employees

Edit

Contact for this request
i

l2test, E-mail

Edit

Approver Information
i

Jolene C. Martinez - jmartinez

Edit

Telephone Information
i

4-4422

Edit

Attachments
i

Edit

Total Items: 1

Submit

Success!

Your Request ID
SD821408

Thank you for your request. Click Status to check the progress of your request or click Services to request another item.

Status

Services

Access Request Termination

For security and access controls the department supervisor or manager should submit an access termination request when an employee is terminated, upon retirement, or when an employee transfers to another department within the health system. Follow the steps below.

1. From the **Search** field type **Access Termination** to search for the catalog item.

UC DAVIS
HEALTH SYSTEM - Employee Self Service

Cart 0

L2 TEST

Dashboard
Subscriptions
Service Catalog
Request Support

Access Termination

Q

+ Browse Catalog - CLICK HERE to Search for Access & Service Request Items by Category

Access/Service Catalog

2. Select the **Access Termination** catalog item.

Access Request

Access Termination
Deprovision access during employment termination.


- From the **Item Details** screen, click on **Request**.

Access Termination [← Back to previous page](#)

Item Details *i*

Deprovision access during employment termination.

Access Request



→ Terminating Employee (ID)

Request

- From the **Order Information** screen click **Next**

Access Termination

Order Information *i*

This request is for: (**IMPORTANT**: If you are requesting access or service on behalf of someone else WITH AN EXISTING ACCOUNT and his/her name is not displaying below, then please exit out of this request and use the Service Assistant widget located under the Service Catalog area to look up and select that person from the list)

l2test ▶ Next

- Search for the terminating employee and click **Next**.

Item Options *i*

Terminating Employee (ID)

rdstest user - rdstestuser

! Required Fields. [▶ Next](#)

- Click **Request Now**.

Access Termination [← Return to Service Detail](#)

Order Information *i*

l2test

Item Options *i*

rdstest user - rdstestuser

Quantity

Add to Cart

Request Now

- Complete the **Verify Delivery Information** screen and click **Next**.

Verify Delivery Information

Cart Order Information

Brief Cart Title (Ex. Access for John Doe)

Terminate effective 6/30/2015

Detailed Description of Cart Request

Employee is retiring.

Required Fields. [Next](#)

Total Items: 1

[Submit](#)

Contact for this request

This task depends on the results of the previous task.

Approver Information

This task depends on the results of the previous task.

Telephone Information

This task depends on the results of the previous task.

Attachments

This task depends on the results of the previous task.

- Click on **Submit**. The **Success** popup appears. Your termination request has been submitted to IT.
- Click on **Status** or **Support** to exit the popup screen.

Verify Delivery Information

Cart Order Information

Terminate effective 6/30/2015, Employee is retiring. [Edit](#)

Contact for this request

I2test, E-mail [Edit](#)

Approver Information

Jolene C. Martinez - jmartinez [Edit](#)

Telephone Information

4-4422 [Edit](#)

Attachments [Edit](#)

Total Items: 1

[Submit](#)

Success!

Your Request ID
SD821363

Thank you for your request. Click Status to check the progress of your request or click Services to request another item.

[Status](#) [Services](#)

External Employees Termination by Email

When access requests are submitted for external employees an expiration date is entered which is one year from the employees start date.

Security controls are set to notify the external employee supervisor or manager via email twenty one days before the expiration date. This email notification is to verify if the employee still needs access or if the employee access should be terminated.

This is an example of the email notification sent to the external employee supervisor or manager. At the bottom of the notification there are two links. The first link should be used to notify the IT Access Team the external employee will be terminating employment. The second link is to renew the external employee's access and provide a new expiration date up to one year.

If the IT Access Team does not receive a response the access will be set to terminate all active access for the external employee on the set expiration date.

If you responded to the request in error i.e. meant to select renew and selected terminate please contact the IT Access Team as soon as possible to prevent access being deactivated.

UC Davis Health System	
Information Technology	
Dear [REDACTED],	
Request Quote Q [REDACTED] has been opened due to employee termination. Please review the employee access below and communicate back if this is employee's access should be renewed rather than terminated.	
Failure to respond will result in all current access being disabled.	
IMPORTANT: If this is a renewal, please use the RENEW reply link below to send a new expiration date up to one year away.	
Request Details:	
Title:	Access Termination
Terminating Employee:	[REDACTED]
Phone:	916-731-2540
Subscriptions Impacted:	
Active Directory	
Badge/ Cardkey - Employee ID Badge and Cardkey	
Active Directory	
Remote Access - VPN - External Employee	
Please click here to email a response to TERMINATE all access	
Please click here to email a response to RENEW access.	

To **terminate** access follow these steps below:

1. From the email notification click on the link **Please click here to email a response to TERMINATE all access**, which will launch a new message from your Microsoft Outlook email.
 - a. You may add an effective date of the termination into the body of the message and/or leave as is to have the employee's access terminated at the current expiration date.

The screenshot shows the Microsoft Outlook 'New Message' window. The title bar reads '{REF:Q162282} Do Not Change Subject Line - Message (HTML)'. The ribbon includes FILE, MESSAGE, INSERT, OPTIONS, FORMAT TEXT, and REVIEW. The MESSAGE tab is active, showing the 'Send' button and fields for From, To, Cc, Bcc, and Subject. The 'To' field is populated with 'notify.servicemgrdev@ucdmc.ucdavis.edu'. The 'Subject' field contains '{REF:Q162282} Do Not Change Subject Line'. The body of the message contains the text 'Please Terminate All Access'.

To **renew** access follow these steps below:

2. From the email notification click on the link **Please click here to email a response to RENEW access**, which will launch a new message from your Microsoft Outlook email.
 - a. Please enter a new expiration date which will extend the external employees access. The access can be renewed up to one year.

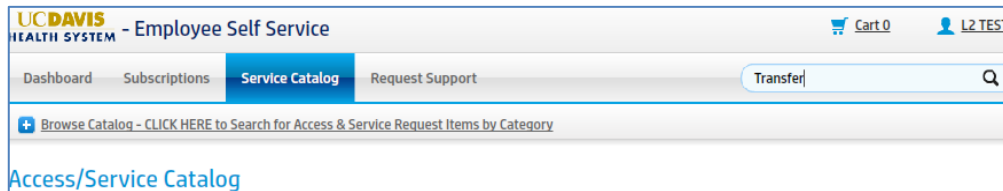
The screenshot shows the Microsoft Outlook 'New Message' window. The title bar reads '{REF:Q162282} Do Not Change Subject Line - Message (HTML)'. The ribbon includes FILE, MESSAGE, INSERT, OPTIONS, FORMAT TEXT, and REVIEW. The MESSAGE tab is active, showing the 'Send' button and fields for From, To, Cc, Bcc, and Subject. The 'To' field is populated with 'notify.servicemgrdev@ucdmc.ucdavis.edu'. The 'Subject' field contains '{REF:Q162282} Do Not Change Subject Line'. The body of the message contains the text 'Please Renew Access' and 'The New Expiration Date is (mm/dd/yyyy):'.

Back to **Access Request** types click [here](#)

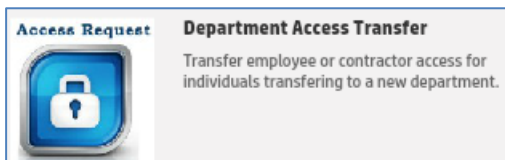
Access Request Transfer Departments

When an existing employee transfers to another department another request should be submitted to ensure the employee will have the appropriate access for their new role. Follow the steps below.

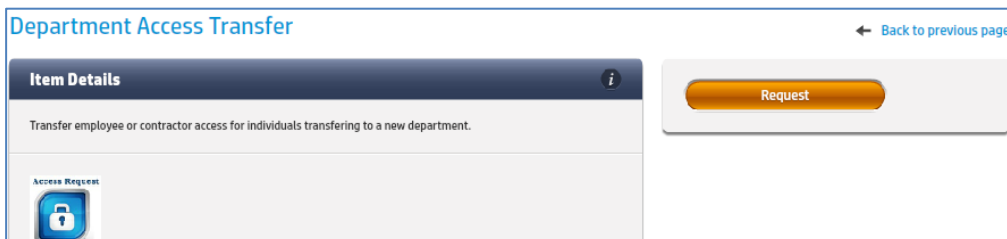
1. From the **Search** field type **Transfer** to search for the access catalog item.



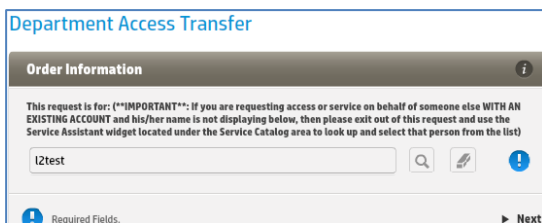
2. Select the **Department Access Transfer** catalog item.



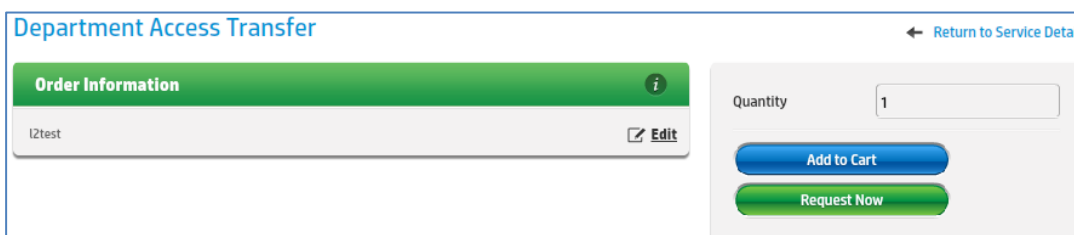
3. From the **Item Details** screen, click on **Request**.



4. From the **Order Information** screen click **Next**



5. Click on **Request Now**.



- From the **Verify Delivery Information** screen enter the new name and click **Next** to complete the form.

Verify Delivery Information

Cart Order Information ⓘ

Brief Cart Title (Ex. Access for John Doe)

Transfer from Pediatrics to Cardiology Department ✓

Detailed Description of Cart Request

Need all access to reflect new job role. ✓

Required Fields. ▶ **Next**

Contact for this request ⓘ

This task depends on the results of the previous task.

Approver Information ⓘ

This task depends on the results of the previous task.

Telephone Information ⓘ

This task depends on the results of the previous task.

Attachments ⓘ

This task depends on the results of the previous task.

- Click **Submit** and the **Success** popup appears. Your request has successfully been submitted to IT.
- Click on **Status** or **Support** to exit the popup screen.

Verify Delivery Information

Cart Order Information ⓘ

Transfer from Pediatrics to Cardiology Department, Need all access to reflect new job role. ✍ **Edit**

Contact for this request ⓘ

l2test, E-mail ✍ **Edit**

Approver Information ⓘ

Jolene C. Martinez - jmartinez ✍ **Edit**

Telephone Information ⓘ

4-4422 ✍ **Edit**

Attachments ⓘ

✍ **Edit**

Total Items: 1

Submit

Success!

Your Request ID
SD821362

Thank you for your request. Click Status to check the progress of your request or click Services to request another item.

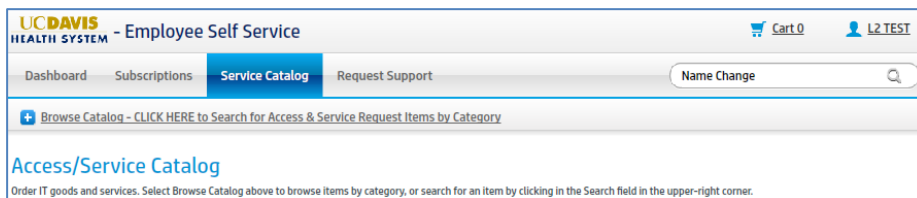
Status **Services**

Back to **Access Request** types click [here](#)

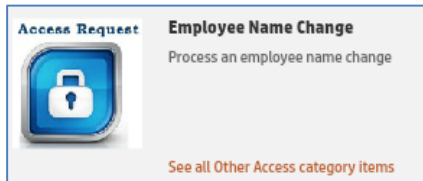
Access Request for Name Change

An access catalog item is available for employees with a recent name change. The Access Team will check Human Resources records to verify the name change is valid before making any changes.

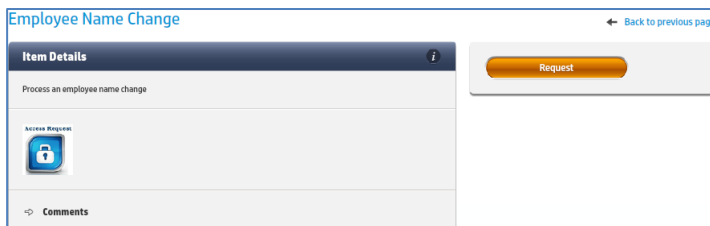
1. From the **Search** field type **Name Change** to search for the access catalog item.



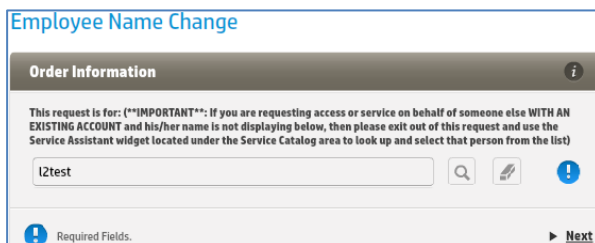
2. Select the **Employee Name Change** catalog item.



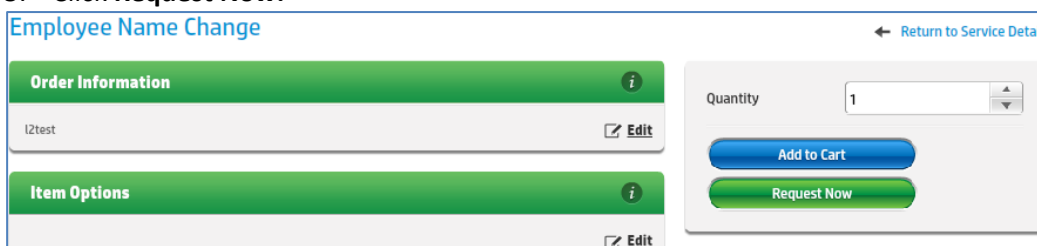
3. From the **Item Details** screen, click on **Request**.



4. From the **Order Information** screen click **Next**



5. Click **Request Now**.



- From the **Verify Delivery Information** screen enter the new name and click **Next** to complete the form.

Verify Delivery Information

Cart Order Information *i*

Brief Cart Title (Ex. Access for John Doe)

Name Change ✓

Detailed Description of Cart Request

Please change my last name from Smith to Jones. I've provided Human Resources Records with my new information. ✓

Required Fields. ▶ Next

Contact for this request *i*

This task depends on the results of the previous task.

Approver Information *i*

This task depends on the results of the previous task.

Telephone Information *i*

This task depends on the results of the previous task.

Attachments *i*

This task depends on the results of the previous task.

- Click **Submit** and the **Success** popup appears. Your request has successfully been submitted to IT.
- Click on **Status** or **Support** to exit the popup screen.

Verify Delivery Information

Cart Order Information *i*

Name Change, Please change my last name from Smith to Jones. I've provided Human Resources Records w... ✍ Edit

Contact for this request *i*

l2test, E-mail ✍ Edit

Approver Information *i*

Jolene C. Martinez - jmartinez ✍ Edit

Telephone Information *i*

4-4422 ✍ Edit

Attachments *i*

✍ Edit

Total Items: 1

Submit

Success!

Your Request ID
SD821361

Thank you for your request. Click Status to check the progress of your request or click Services to request another item.

Status Services

Back to **Access Request** types click [here](#)

Service Request

A Service Request is use to request a new laptop, software installation, or voice services. The catalog items are categorized by a top level service (highlighted in blue) which then is categorized by a technology or service.

Top Category

Technology or Service

Communication and Collaboration Services ▶

- ▶ Auxiliary Communication Systems •
- Conferencing •
- Faxing •
- Messaging Services •
- Mobile Device •
- Pager Services •
- Telephone Services ▶
- Vocera •

Facilities ▶

- ▶ Alarm Systems •
- Building Use and Access •
- Facilities Projects •

IT Evaluation for New Technology •

Network Connectivity •

Personal Computing Services ▶

- Desktop Services •
- Printer Services •

Software Application Services ▶

- Departmental Applications •
- Enterprise Applications •
- Interface •
- Reports •
- Research Services •
- Web Services •

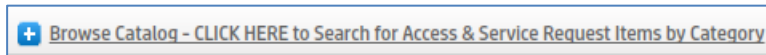
These services below are only available to internal IT employees to request IT to IT services. An IT liaison may submit a request for a non-IT employee.

Top Category → **Technology or Service**

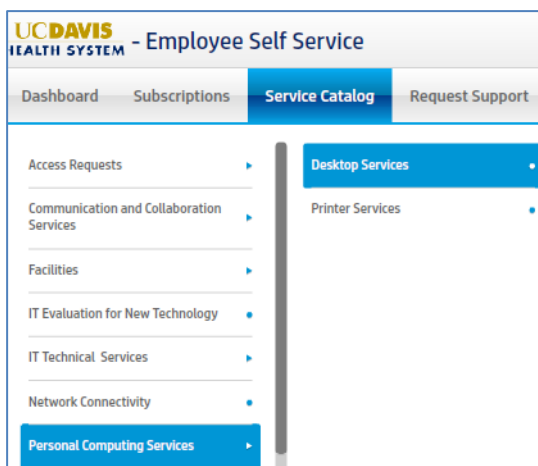


Service Request for Myself

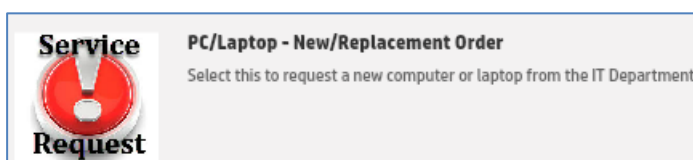
1. To begin a new service request click **Browse Catalog**.



2. Click the Parent category **Personal Computing Services**.
3. Now select the appropriate secondary category. For this example, select **Desktop Services**.



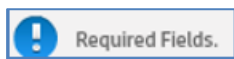
4. A list of service request catalog items appear. For this example, click on **PC/Laptop – New/Replacement Order**.



5. The **Item Details** screen appears with a list of information needed to submit the request. Click on Request.

6. The **Order Information** screen appears. Click on Next.

7. From the **Item Options** section, complete the required fields which will have this icon next to each field.



8. A green checkmark will appear when each field is completed.



9. Click **Next**.

Item Options

Is this request for new equipment or to replace existing equipment?

☒ New

☐ Replace

Quantity of PC being requested (if none, enter 0):

0

Quantity of Laptop being requested (if none, enter 0):

1

What is the principal use of the equipment being requested?

☒ Patient Care/Clinical

☐ Administrative Support

☐ Education/Research

☐ Other

If principle use above was 'other', please specify:

N/A

Please list any special software applications that should be installed:

Microsoft Office 2010

Quantity of monitors being requested (if none, enter 0)

0

What is the name of the device being replaced?

N/A

Will the computer need to be designated as an EMR Downtime Reporting device?

☐ Yes

☒ No

☐ Unknown

Will this computer need to print any of the following types of documents from EMR: Demographic labels, Lab labels, After Visit Summaries (AVS), or Order printouts?

☒ Yes

☐ No

☐ Not Sure

Expected Completion Date:

03/25/2016

12 : 00 PM

Business Justification:





I'm a clinical specialist that floats to different areas of the health system.

Required Fields.

Next

10. Click on **Request Now**.

PC/Laptop - New/Replacement Order [← Return to Service Detail](#)





Order Information  l2test  Edit	Quantity: 1 Add to Cart Request Now
Item Options  New, 0, 1, Patient Care/Clinical, N/A, Microsoft Office 2010, 0, N/A, No, Yes, March 25, 2016 12:00:00 PM, I'm ...  Edit	

11. The **Verify Delivery Information** screen appears. Complete the required fields. Add any necessary attachments.

a. Approver Information is usually a supervisor, manager, or designated person from your department.

12. Click **Next**.











Verify Delivery Information

Cart Order Information 	
Brief Cart Title (Ex. Access for John Doe) Request for new laptop for clinician 	
Detailed Description of Cart Request Request for new laptop for clinician 	
 Required Fields. ▶ Next	

13. Click Submit and the **Success** popup appears. Your request has successfully been submitted to IT.

14. Click on **Status** or **Support** to exit the popup screen.

Verify Delivery Information

Cart Order Information  Request for new laptop for clinician, Request for new laptop for clinician  Edit	Total Items: 1 Submit
Contact for this request  l2test, E-mail  Edit	
Approver Information  Annmarie Boylan - aboylan  Edit	
Telephone Information  4-2011  Edit	
Attachments   Edit	

Success!

Your Request ID
SD821292

Thank you for your request. Click Status to check the progress of your request or click Services to request another Item.

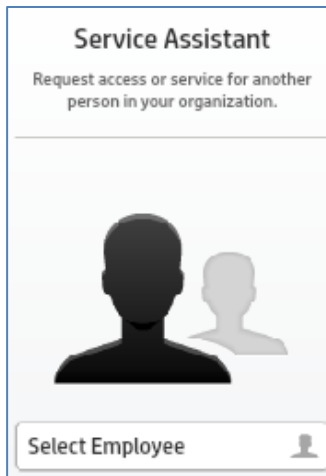
[Status](#)
[Services](#)

Service Request for another Employee

Some departments designate an employee to submit all requests. In order to request service for another person within your organization you will need to select the employee using the **Service Assistant**.

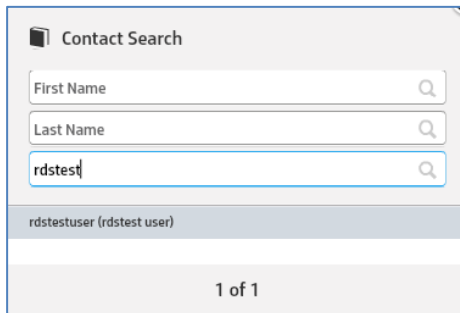
The Service Assistant is located on the **Service Catalog** tab below the **Access/Service Catalog** section.

1. Click on **Select Employee**.



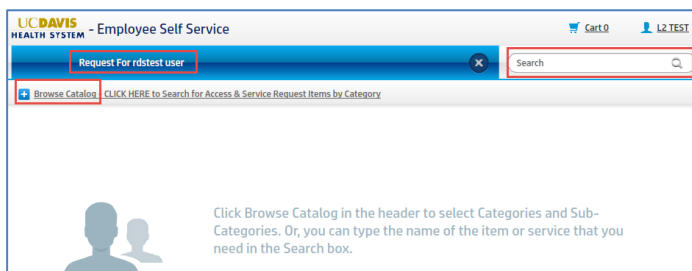
The Service Assistant interface is a rectangular box with a light blue border. At the top, it has the title "Service Assistant" in bold. Below the title is a subtitle: "Request access or service for another person in your organization." In the center, there is a graphic of two stylized human silhouettes, one in black and one in light gray. At the bottom, there is a button labeled "Select Employee" with a small person icon to its right.

2. Search for employee by typing any of the following search criteria:
 - a. First and Last name
 - b. Contact name which is the employee's LAN/Active Directory login name



The Contact Search interface is a rectangular box with a light gray border. It has a title "Contact Search" with a magnifying glass icon. Below the title are three search input fields: "First Name", "Last Name", and "rdstest". Each field has a magnifying glass icon to its right. Below the input fields, there is a search result: "rdstestuser (rdstest user)". At the bottom, it says "1 of 1".

3. The employee's name is listed at the top of the screen.



The Employee Self Service interface is a rectangular box with a light blue border. At the top, it has the title "UC DAVIS HEALTH SYSTEM - Employee Self Service". Below the title is a blue header bar with a search box containing "Request For rdstest user" and a magnifying glass icon. Below the header bar, there is a link "Browse Catalog" and a text box "CLICK HERE to Search for Access & Service Request Items by Category". At the bottom, there is a graphic of two stylized human silhouettes and a text box: "Click Browse Catalog in the header to select Categories and Sub-Categories. Or, you can type the name of the item or service that you need in the Search box."

4. To add a service catalog items to the cart you have two options:
 - a. Enter technology or service name in the **Search** field then select the item
 - b. Click on **Browse Catalog** to see a list of items

Search Results

new phone request

Service - 100 Results (Total)

Service Request
New Fax Phone Number Request
 Select this to request a new phone number for a fax machine
[See all Faxing category items](#)

Service Request
New Phone Request
 Select this to install new telephone(s) service with a new prime number

Recurring Period

Communication and Collaboration Services

Facilities

IT Evaluation for New Technology

IT Technical Services

Network Connectivity

Personal Computing Services

Conferencing

Faxing

Messaging Services

Mobile Device

Pager Services

Telephone Services

Central Telephone Services

Desktop Phone Services

Outside Telephone Carrier Services

Voice Mail

5. After selecting a catalog item click on **Request** to complete the form from the **Item Details**.

New Phone Request

Item Details

Request

6. Complete the **Order Information**
7. Click **Next**

New Phone Request

Order Information

8. Complete the **Item Options**
9. Click **Next**.

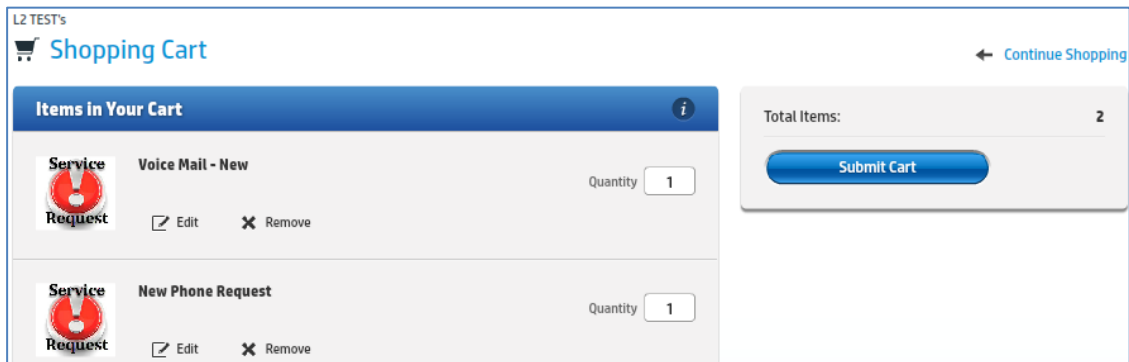
Item Options

10. Click **Add to Cart**.



11. The catalog item is now in your **Shopping Cart**. You can continue these steps to add multiple service catalog items to your **Shopping Cart**.

12. Click **Submit Cart**.



13. Complete the **Verify Delivery Information** screen.

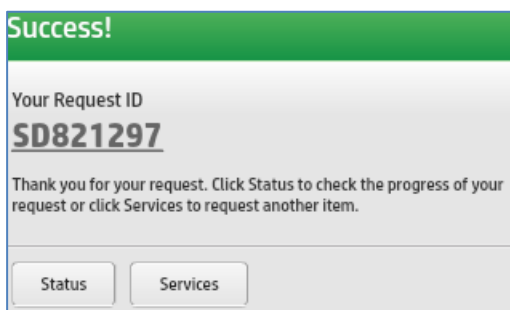


14. Click **Submit**.



15. **Success** popup appears. Your service request has been submitted to IT.

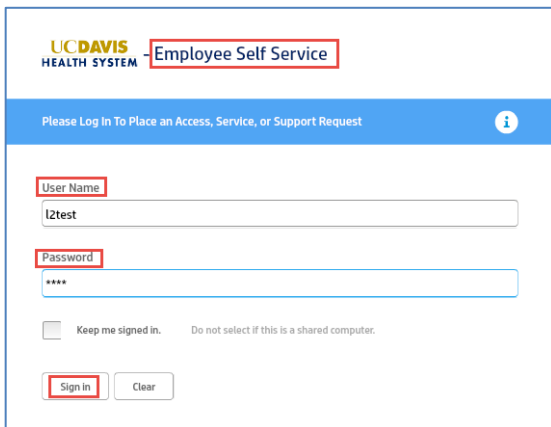
16. Click on **Status** or **Support** to exit the popup screen.



Checking Status of My Request

To check the status of any support, access, or service requests you submitted through the Employee Self Service application follow these steps.

1. Log into the IT HP Employee Self Service website at <https://ess.ucdmc.ucdavis.edu/src/secure/main.jsp>
2. From the **Dashboard**, click on **Your Requests** option to view existing requests.
3. From the **Request Inbox** click on your request and click on **View**.
4. Towards the bottom of the screen click on **History** to expand and view the **Activity Logs**.
5. Expand the **Request Updates**. This is where status updates are entered by IT staff.



UC DAVIS HEALTH SYSTEM - Employee Self Service

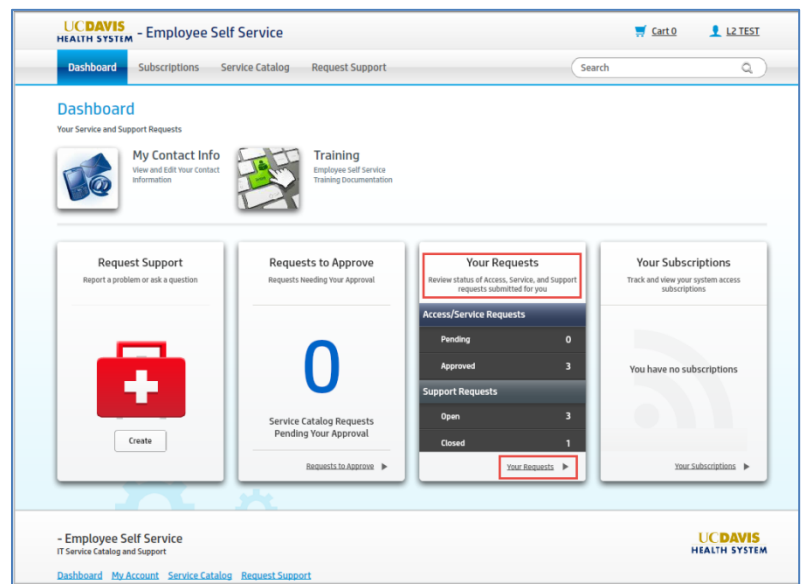
Please Log In To Place an Access, Service, or Support Request

User Name
 l2test

Password

☐ Keep me signed in. Do not select if this is a shared computer.

Sign in Clear



UC DAVIS HEALTH SYSTEM - Employee Self Service

Dashboard Subscriptions Service Catalog Request Support

Search

Dashboard

Your Service and Support Requests

My Contact Info View and Edit Your Contact Information

Training Employee Self Service Training Documentation

Request Support Report a problem or ask a question

Requests to Approve Requests Needing Your Approval

Your Requests Review status of Access, Service, and Support requests submitted for you

Access/Service Requests

Pending	0
Approved	3

Support Requests

Open	3
Closed	1

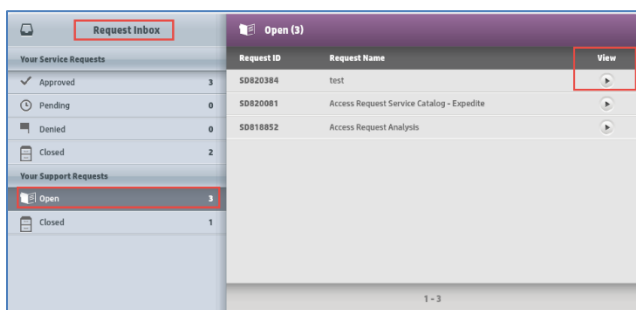
Your Subscriptions Track and view your system access subscriptions

You have no subscriptions

Your Subscriptions

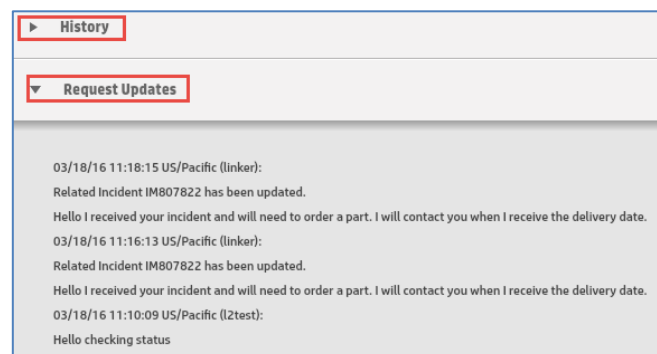
- Employee Self Service
 IT Service Catalog and Support

Dashboard My Account Service Catalog Request Support



Request Inbox		Open (3)	
		Request ID	Request Name
✓ Approved	3	SD020384	test
⌚ Pending	0	SD020001	Access Request Service Catalog - Expedite
✗ Denied	0	SD010052	Access Request Analysis
📁 Closed	2		
Your Support Requests			
📁 Open	3		
📁 Closed	1		

1 - 3



History

Request Updates

03/18/16 11:18:15 US/Pacific (linker):
 Related Incident IM807822 has been updated.
 Hello I received your incident and will need to order a part. I will contact you when I receive the delivery date.

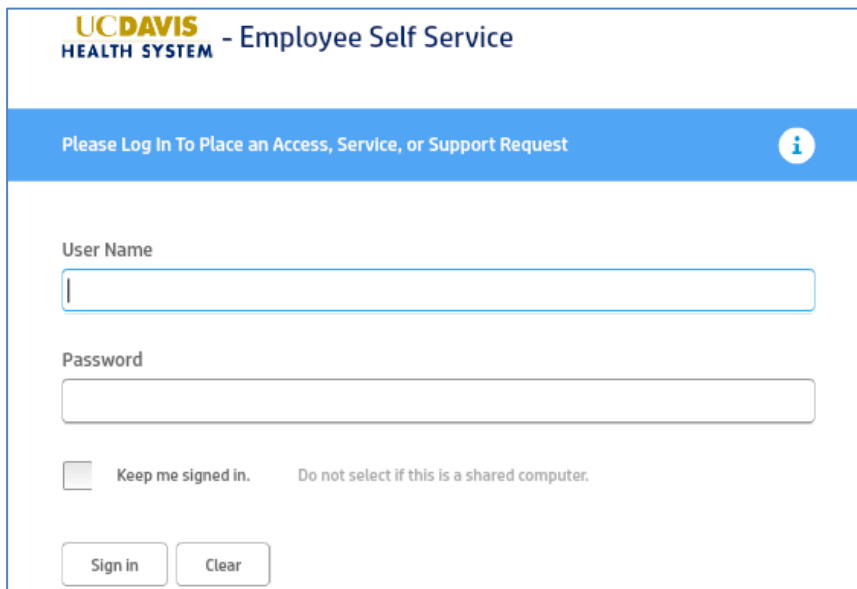
03/18/16 11:16:13 US/Pacific (linker):
 Related Incident IM807822 has been updated.
 Hello I received your incident and will need to order a part. I will contact you when I receive the delivery date.

03/18/16 11:10:09 US/Pacific (l2test):
 Hello checking status

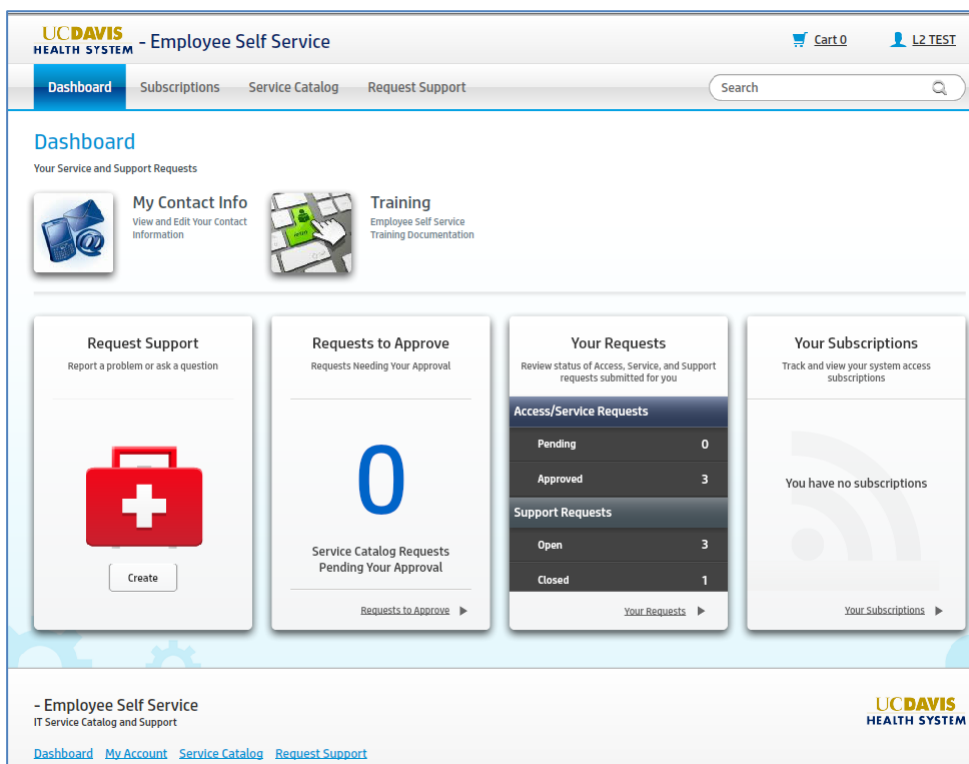
Schedule Approval Delegation

In the event of an absence, a supervisor or manager may select a designated employee to perform the approval process. To select a delegate follow the steps below:

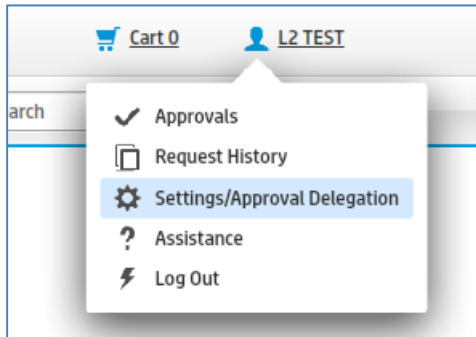
1. Log into the Employee Self Service at <https://ess.ucdmc.ucdavis.edu/src/secure/main.jsp> using your Computer/Active Directory/Citrix login username and password and click on **Sign In**.



2. By default the **Employee Self Service Dashboard** appears.



3. From the **Dashboard** click on your login name located in the upper right corner. This will expand a menu.
4. Click on **Settings/Approval Delegation**.



5. From **Service Settings**, click on **Approval Delegation**.
6. Complete the **Start Date**, **End Date**, **Type**, and employee you designated for approvals during your absence.
7. Click **Schedule**.

A screenshot of the 'Approval Delegation' form within the 'Service Settings' section of a web application. The left sidebar shows a navigation menu with 'Application', 'Service Settings', and 'Approval Delegation' (which is selected and has a '0' next to it). The main content area is titled 'Approval Delegation' and includes a sub-header 'Scheduled Approval Delegations' with a message: 'You have no delegated approvals scheduled.' Below this is a section for 'New Approval Delegation' with instructions: 'Please specify the following information to designate an Approver, and then click Schedule to save your choices.' The form contains several input fields: 'Start Date' (03/07/2016), 'Start Time' (08 : 00 AM), 'End Date' (03/10/2016), and 'End Time' (05 : 00 PM). There are also checkboxes for 'Start Date' and 'End Date' which are checked. A 'Choose Type' dropdown menu is set to 'Service'. A 'Delegate To' field contains the text 'jmartinez' and is followed by search, edit, and warning icons. At the bottom of the form is a 'Schedule' button.

- The Scheduled Approval Delegations lists your active delegations. From this screen you can edit or delete and existing delegation or create a new one.

Application

Service Settings

Approval Delegation 1

Approval Delegation

If you are out of the office, you can still keep everything on schedule by delegating your approval tasks to another person. You can choose who will take over your approval duties and when they will approve on your behalf.

Scheduled Approval Delegations

Jolene C. Martinez	Service	03/07/2016-03/10/2016		
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New Approval Delegation

Create

Adding Attachments

To add an attachment to any request follow these steps.

- From the Verify Delivery Information screen you can add attachments to your request.

Verify Delivery Information

- Click on **Edit** within the **Attachments** section to add an attachment.

Attachments

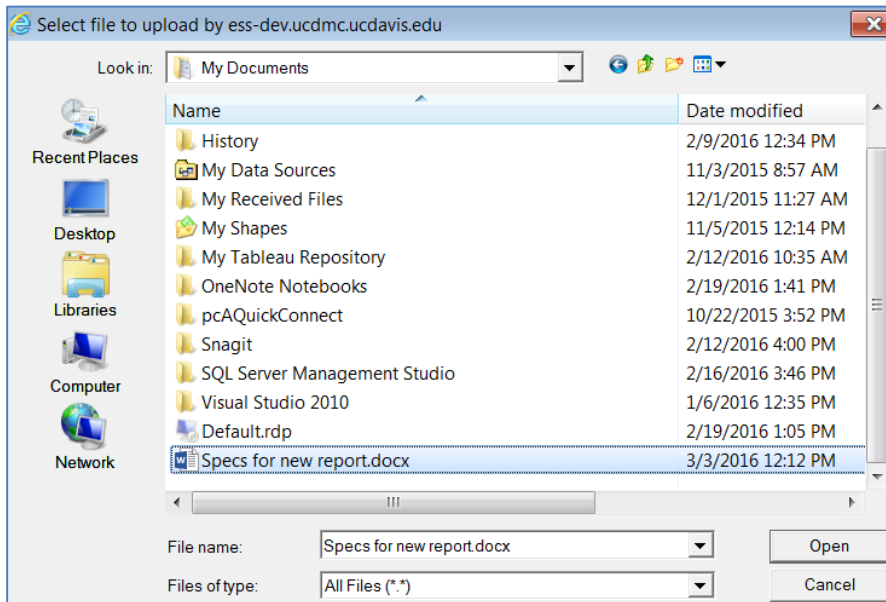
Edit

- Click on the folder icon to the right of the **Attach a File** field.

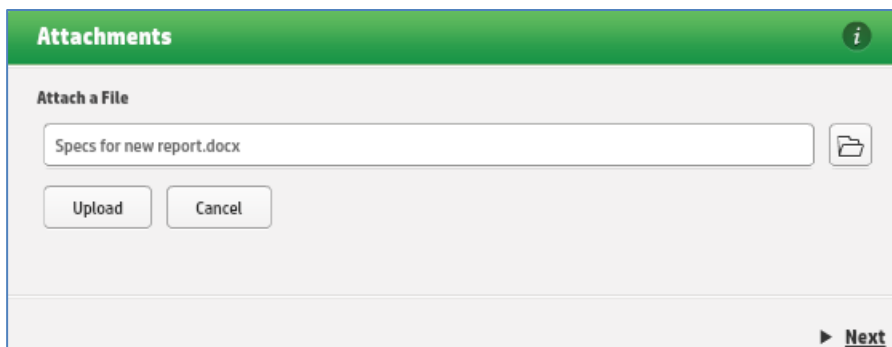
Attachments

Attach a File

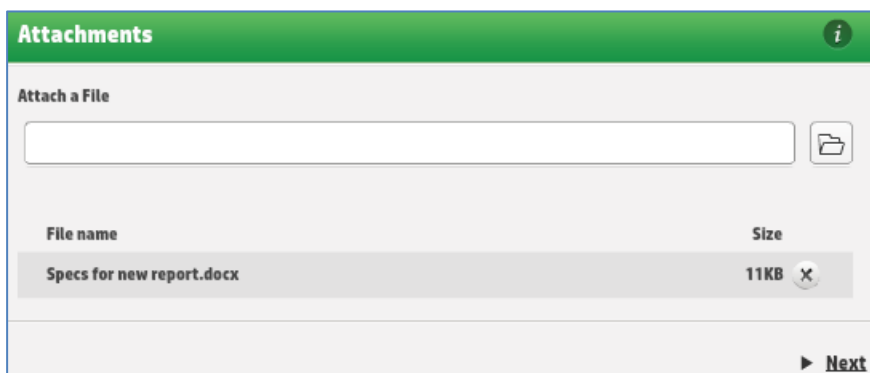
4. Browse for the file and click **Open**.



5. Click on Upload.



6. The form is now attached to the request.



Approve or Deny a Request from Email Notification

To perform the approval process from Microsoft Outlook email follow the steps below.

1. An email notification is sent and provides the following information:
 - a. Requestor name
 - b. Service Catalog ID
 - c. Title of request
 - d. Purpose of request
 - e. Approve link
 - f. Deny link
 - g. Employee Self Service link
2. To approve a request click on Approve, which will launch your Microsoft Outlook email to a new message with the information added into the body of the message which will process the approval. No other information needs to be added to the message, simply click Send.

UC Davis Health System	
Information Technology	
Dear jmartinez,	
L2TEST has submitted the following I.T. Service Catalog Request.	
Service Catalog ID:	SD821360
Title:	Need software installed
Purpose:	Microsoft Project
Approve	Deny
Click here to login to HP Service Manager and Approve or Deny the Request	
(NOTE: Link is only accessible from computers connected to the UCDHS network)	

SD_RESPONSE approve	
FILE	MESSAGE
Cut Copy Paste Format Painter Clipboard	Calibri 11 B I U Address Book Check Names Attachments
From: jolmartinez@ucdavis.edu To: <input type="checkbox"/> approvals.servicemgrdev@ucdmc.ucdavis.edu Cc: Bcc: Subject: SD_RESPONSE approve The Service Request	
SD_UNIQUE_BEG SD821360 approve jmartinez c5a56b92a5b4576828f84ac065738dc3 SD_UNIQUE_END Do not alter the approval tag above. If denied, please provide a reason above the tag.	

3. To deny a request click on Deny which will launch your Microsoft Outlook email to a new message with the information added into the body of the message which will process the denial. You are required to add a denial reason at the beginning of the email. Now click Send.

SD_RESPONSE|deny

FILE **MESSAGE** INSERT OPTIONS FORMAT TEXT REVIEW

Cut Copy Paste Format Painter Clipboard

Calibri 11 A A Basic Text

B I U A Address Book Check Names

From jolmartinez@ucdavis.edu

To...

Cc...

Bcc...

Subject SD_RESPONSE|deny The Service Request

Send

This request is denied. The software does not need to be installed locally. The tool is located in Citirx.

SD_UNIQUE_BEG|SD821360|deny|jolmartinez|55e1d40ee7265f55bd1c3a7b684aef61|SD_UNIQUE_END

Do not alter the approval tag above. If denied, please provide a reason above the tag.

Contact Us

TECHNOLOGY OPERATIONS CENTER CUSTOMER SERVICE INFORMATION TECHNOLOGY



Support: <https://ess.ucdmc.ucdavis.edu/src/secure/main.jsp#services/home>

Training Resources: http://intranet.ucdmc.ucdavis.edu/it/units/it_ops/customer.shtml



Physical

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Phone

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(916) 734-HELP (4357)



Fax Number

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(916) 734-1666