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

- Lesson 1: Opening a Service Request
- Lesson 2: Complete the “Other” SR form
To open a service request, browse to the service request form you need by either using the Search feature or manually looking through the categories. For this example we’ll use the “Other” service request form.
Users can create a Service Request using “Other” when the service requests in the system do not fit their needs. Please note that “other” is not a searchable term in SRM and you will have to locate this form from the Categories section.
Lesson 1
Opening a Service Request

After clicking on the category “Other Services”, choose “Other” from the Available Requests section, then choose Request Now.
Lesson 2
Complete the “Other” SRD Form

Upon clicking Request Now, the SRM application opens the “Other” service request form. Only the bolded questions are required. We’ll break down this form into more detail over the next few slides.
Lesson 2
Complete the “Other” SRD Form

The information up top will automatically populate with your information. This information could be slightly different if you’re requesting a service on behalf of another person. Use the Edit button to alter any of the information shown. Click on the calendar icon next to the Required Completion field to select a date from a pop-up calendar. This is the deadline by which you will need your request to be fulfilled.
Lesson 2
Complete the “Other” SRD Form

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

Note: You can add up to 3 attachments when you are first submitting your service request. You can add additional attachments once it has been submitted.
Lesson 2
Complete the “Other” SRD Form

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

Instructions

Complete the following spreadsheets:
- CalCloud Tenant Onboarding Questionnaire
- CalCloud Portal User Setup Questionnaire

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

* Lead time can be negatively affected by incomplete documentation
Lesson 2
Complete the “Other” SRD Form

The Billing Prefix drop down box options will display only the prefixes that are setup for your department. The Account Code box is a free form field that you can complete but is not required.
When completing the service request, use the drop down list to locate your management or directly type their name in the field, with your immediate supervisor or manager as the first approver, and the next level of management as the second and third. If the request only requires one or two approvers, you can select or type “None” in place of a specific member of management, as you can see in the example on the screen.
If you choose “Yes” for expediting the request, the system will display the cost for expediting a request directly below.
Lesson 2
Complete the “Other” SRD Form

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

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

Note: The Service Categories available to you can vary depending on which department you work for.
Lesson 2
Complete the “Other” SRD Form

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

- New Service
- Modify Service
- Discontinue Service
- Other
Lesson 2
Complete the “Other” SRD Form

Depending on what you are requesting, a budget amount may be required. Examples would be new servers or software licenses. Leaving this blank may result in delays or rejection of this request.
Lesson 2
Complete the “Other” SRD Form

CDT will charge your department the applicable rates and/or pass through charges for the services being requested. Click yes to acknowledge this statement. You can also click on the Rates link to view our current list of rates on the CDT website.
Lesson 2
Complete the “Other” SRD Form

Does this request involve a system that stores, processes, or transmits confidential, sensitive, or personal information as defined in SIMM 5305-A?  

- [ ] No
- [x] Yes

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

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

- [ ] Federal Tax Information
- [ ] Payment Card Information
- [ ] Personally Identifiable Information
- [ ] Criminal Justice Information
- [ ] Information subject to the Family Education Rights and Privacy Act
- [ ] Information subject to other Regularity Requirements
Lesson 2
Complete the “Other” SRD Form

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

Use the **Request Details** field to provide additional information and clarification about your request.
Lesson 2
Complete the “Other” SRD Form

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

Note: Although it is fully functional, we do not recommend using the Add to Cart function at this time.
Lesson 2
Complete the “Other” SRD Form

If you chose Summary, this pop up box will appear with a summary of your request. Click on the Back button to return to the previous screen.
Draft requests can be found in the My Requests section in SRM. Clicking on Complete returns you back to the form to finish submitting your service request.
Clicking Submit from the service request form will start the approval process. Your request will then show its status as Submitted or Waiting Approval in the My Requests section of SRM.