People and Money system
We realise this formatting may not be accessible for all – to request this document in an alternative format please email hrhelpline@ed.ac.uk

Assumed Knowledge:
The term Service Request is used to describe a help ticket which is opened with the HR helpline and sent on to other HR teams to process as needed. It is often shortened to SR.

My Knowledge holds policy information, frequently asked questions, and user guides. If you cannot find the information you are looking for in My Knowledge, raise a Service Request enquiry.

A manager can raise a request on behalf of a direct report.

An email sent to hrhelpline@ed.ac.uk automatically raises a service request in the system for action by the HR Helpline.

Service requests requiring attachments to be sent to HR need to be raised in the system. Employees cannot close their own service requests.

Creating a Service Request
A service request can be submitted to complete an online HR form, or to raise an enquiry if the information required is not available in the Knowledgebase.

1. From the Home page, click on the Help Desk link.
2. Next, click the Service Requests app.

3. Click on the Create Service Request button.

4. Enter summary information in the Title field.

5. Click the folder icon at the end of the field Category field.

6. Click on the triangle next to Enquiry or Form.

7. Type text into the Service Request Details box and complete other relevant fields.

8. Upload files into the Attachments section if applicable,

9. Click Save and Close.

For detailed guidance, see the next section.

Updating a Service Request Enquiry

1. From the Home page, click on the Help Desk link.

2. Click the Service Requests App.

3. Click on the Reference Number of the request that you would like to update.

4. In the Messages tab, click Compose to create a new message.

5. Click Post to send the response.

6. If desired click on the Contacts tab to Add Manager and other interested parties by clicking on Add Contact.

7. Click Save and Close.

For detailed guidance, see the next section.

In Detail...
Creating a Service Request

1. From the Home page, click on the Help Desk link.

2. Click the Service Request app.
3. The **All Open Service Requests** list is displayed and shows your open requests, the **Status**, the **Queue** the request is in, and whether it **Assigned To** an individual or is currently unassigned.

4. Click the **Create Service Request** button and the **Create Service Request** page opens.

5. In the **Title** field, enter a summary explanation for the request.
6. To select the **Category** click on the folder icon at the end of the field.

7. If you have an **Enquiry**, see the next step. If you need to complete an online HR form jump to [Submitting an HR Form Service Request](#).

8. In the **Category** window, click on the triangle next to **Enquiry**.
9. In the expanded section, click on the triangle next to the applicable sub-category. Select the desired option within the sub-category and click **OK**.

![Select Category](image)

10. Enter your enquiry details into the **Service Request Details** box, and any other applicable fields.

![Service Request Details](image)
11. If you would like to attach supporting documentation to the request, see the next step. If this does not apply jump to step 16.

12. To attach a document, click on the plus sign in the **Attachments** section.

13. To upload a document to the service request:
   - **a.** Ensure **Type** field is set to ‘File’
   - **b.** **Category** field will be set to ‘Miscellaneous’
   - **c.** Click **Choose Files** button and navigate to the location where the document is stored and select it.
   - **d.** The filename appears in the **Attachments** window.
To upload and attach a link into your service request:

a. ensure **Type** field is set to **URL**
b. **Category** field will be set to **Miscellaneous**
c. paste the URL for the site into the **Link** field
d. add a **Title** for the link, if required
e. click **Add** button
f. The uploaded site link appears in the **Attachments** window (f).

14. Repeat step 13 until you have uploaded all the requisite documents and when you have finished, click **OK**.

15. The window closes and a link to the attachment(s) appears in the request.
16. Click **Save and Continue** to keep the request open for further input and when you are ready to submit, click **Save and Close**.

17. When the request is submitted a **Confirmation** message appears on screen for a few seconds, with the service request number, and lets you know the request has been created. (Click on the X to dismiss the confirmation message if it does not disappear.)

18. The new request appears in your list of **All Open Service Requests** and shows the **Queue** it has been auto-assigned based on the enquiry type.

19. You will be notified via email when there is a response to your request. The Bell notification symbol also appears in the banner in People and Money to let you know there is something for you to action.
Updating a Service Request

1. From the Home page, click on the Help Desk link.

2. Click the Service Request App and the All Open Service Requests list is displayed and shows your open requests.

3. Click on the Reference Number to view the request details.

4. The request opens in the Summary tab.
5. Click on the **Messages** tab to read a response you have been sent or view any previous messages in the Service Request.

6. To reply to a message, click on the **Compose** button to create a new message.

7. Enter your response in the text box and click **Post** to send the message to the assigned team.
8. The text box closes and your reply is displayed in the **Messages** tab.

![Image of a service request form with the Messages tab highlighted]

The request is returned to the assigned individual to action, and repeated updates can be made until a resolution is reached.

8. Optionally, use the **Contacts** tab allows you to add other points of contact to your Service Request, for example your Line Manager.

To add your Line Manager:

a. Click the **Contacts** tab
b. Select the **Add Manager** button
c. The name of your Line Manager is automatically inserted
d. Click the **Add Contacts** button and use the Search function to add another staff member as a point of contact
e. Click **Save** (or **Save and Close**)
9. Additional options are available if you click on the **Actions** button on the right-hand side of your Service Request, i.e. “Copy” and “Get Link”.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy</td>
<td>Creates a new Service Request, copying the Category from the original Service Request. Just enter the title of the new Service Request when prompted. You can then add the detail into the new request and Save and Close to submit it.</td>
</tr>
<tr>
<td>Get Link</td>
<td>Creates a direct link to your Service Request which you can then add into an email or another Service Request.</td>
</tr>
</tbody>
</table>
Submitting an HR Form Service Request

An online HR form is submitted in the same way as an Enquiry.

1. Follow the steps in Creating a Service Request and in step 7 click on the triangle next to Forms to open the list of HR forms.

2. Select the required form and click OK.
3. The form appears on screen for completion with the relevant information.

4. Follow steps 10 to 19 in Creating a Service Request above to continue to enter your enquiry details into the Service Request Details box, and any other applicable fields.

   **Note:**
   In the Assignment Number field, please prefix –
   - a. E for Employees
   - b. C for Contingent workers
   - c. P for Pending workers

**Submitting an HR Interim Form Service Request**

An Interim HR form is submitted in the same way as an Enquiry.

1. Complete the required Interim Form which is available from the HR A-Z Forms page. Guidance on the form will tell you how to fill it in with the relevant information.

2. Follow the steps in Creating a Service Request and attach the form before submitting your request.
Glossary

Please refer to Glossary

Appendix

List of SR Forms -

List of Interim Forms -