THE UNIVERSITY of EDINBURGH

System User Guide

Employee Guide – How to raise and maintain a Service Request enquiry

We realise this formatting may not be accessible for all – to request this document in an alternative format please email or call HRHelpline@ed.ac.uk.

Contents

Introduction 2

In Brief 2

Creating and Submitting a Service Request 2

Updating a Service Request Enquiry 3

In Detail 3

Creating and Submitting a Service Request 3

Submitting a HR Form Service Request 10

Submitting a HR Interim Form Service Request 12

Updating a Service Request 12

Appendix 1 - Statuses and Notifications 17

Version History 18

Reviewers & Approvers 18

Introduction

This guide covers key tasks for **Employee** in 'How to raise and maintain a Service Request enquiry' system process. It is related to the Process User Guide to Service Requests which is linked below.

Guide to Service Requests

The Process User Guide provides supporting guidance on all Service Request categories that are available and when they should be used.

Before you start

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

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 should be raised in the system using the appropriate SR category.

Employees cannot resolve their own service requests.

In Brief

This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips is provided within the 'In Detail' section.

Creating and Submitting a Service Request

A service request can be raised to submit 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 **Help Desk**.
2. Click the **Service Requests** app.
3. Click 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. Select the relevant **sub-category** or **form**.
8. Type text into the **Service Request Details** box and complete other relevant fields.
9. Upload files into the **Attachments** section if applicable.
10. Click **Save and Close**.

Updating a Service Request Enquiry

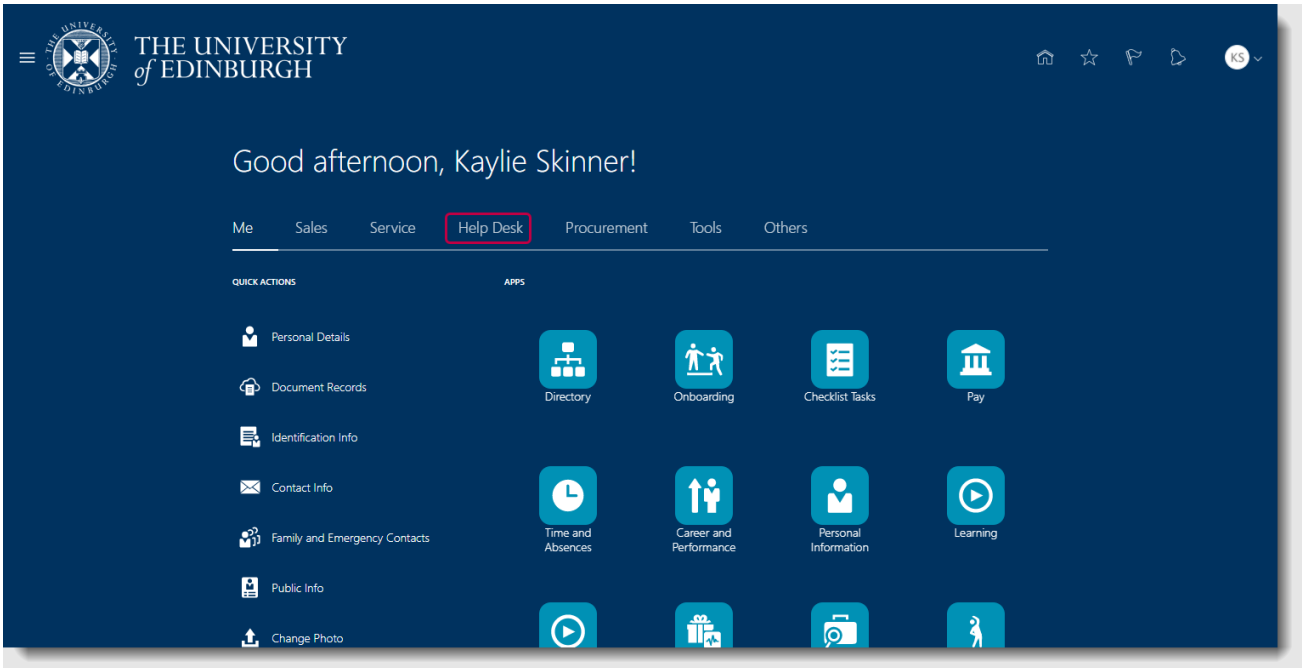
1. From the Home page, click on **Help Desk**.
2. Click the **Service Requests** App.
3. Click on the relevant **SR Reference Number** of the request that you would like to update.
4. In the **Messages** tab, click **Compose** to create a new message.
5. Click the **channel** dropdown and select **Web.**
6. Click **Post** to send the response.
7. Click **Save and Close**.

In Detail

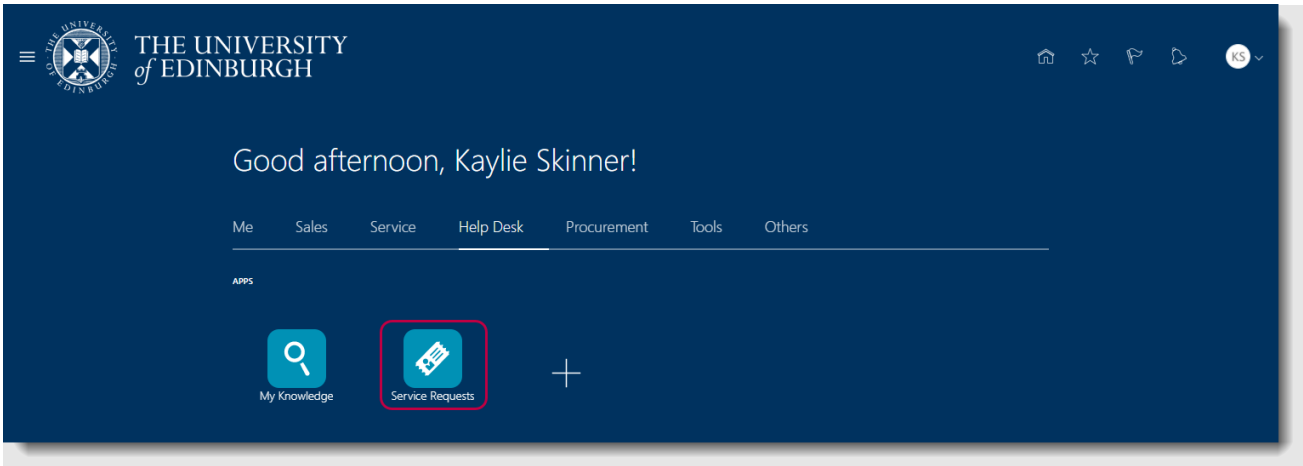
This section provides the detailed steps and includes relevant screenshots from the system.

Creating and Submitting a Service Request

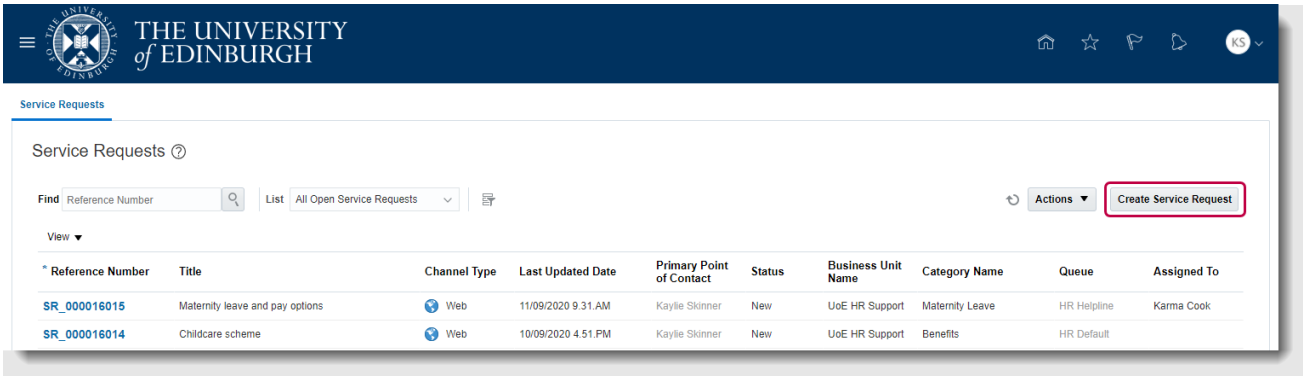
1. From the **Home** page, click on **Help Desk**.



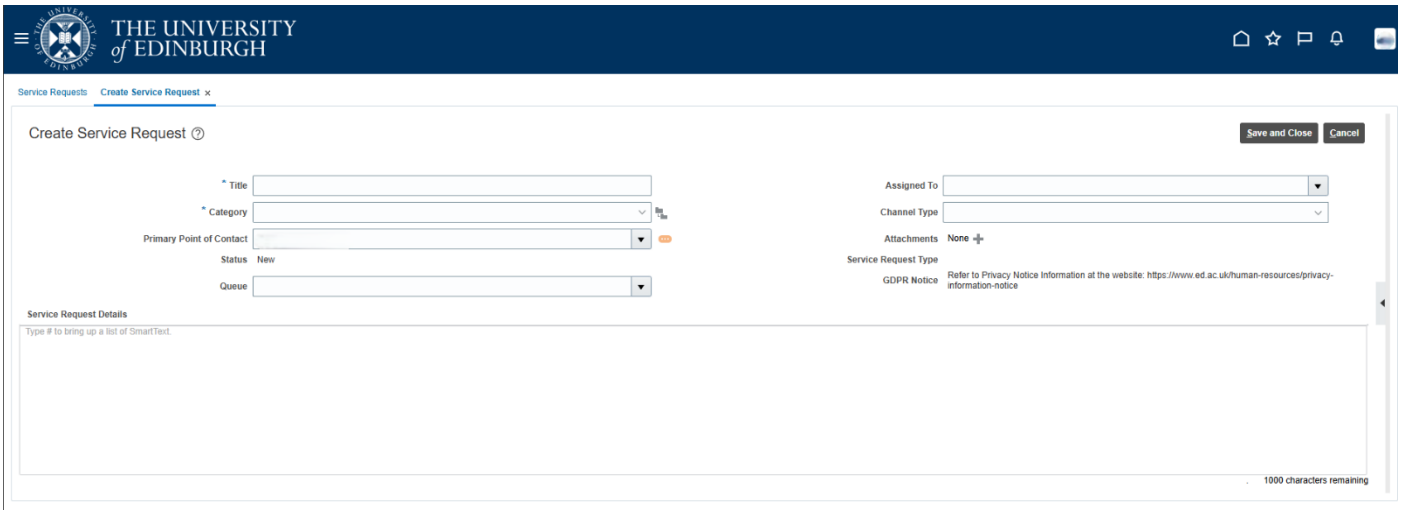
2. Click the **Service Requests** app.



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.

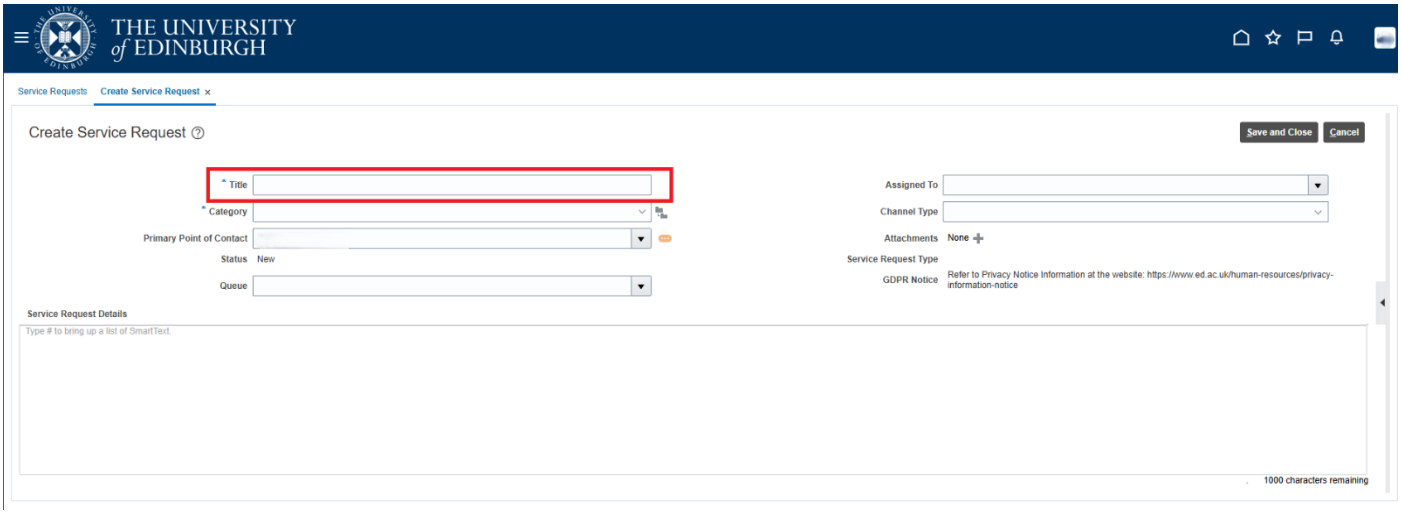


3. Click the **Create Service Request** button and the **Create Service Request** page opens.

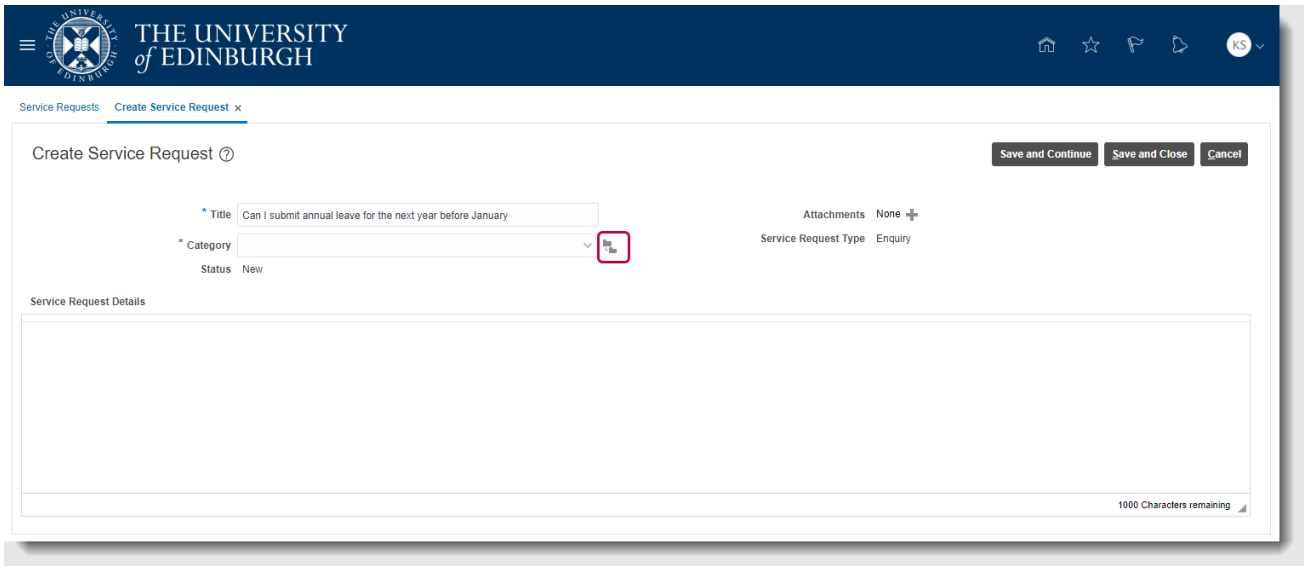


Note: when you raise a service request through People and Money, the **Primary Point of Contact** field automatically fills with your name.

4. In the **Title** field, enter a summary explanation for the request.

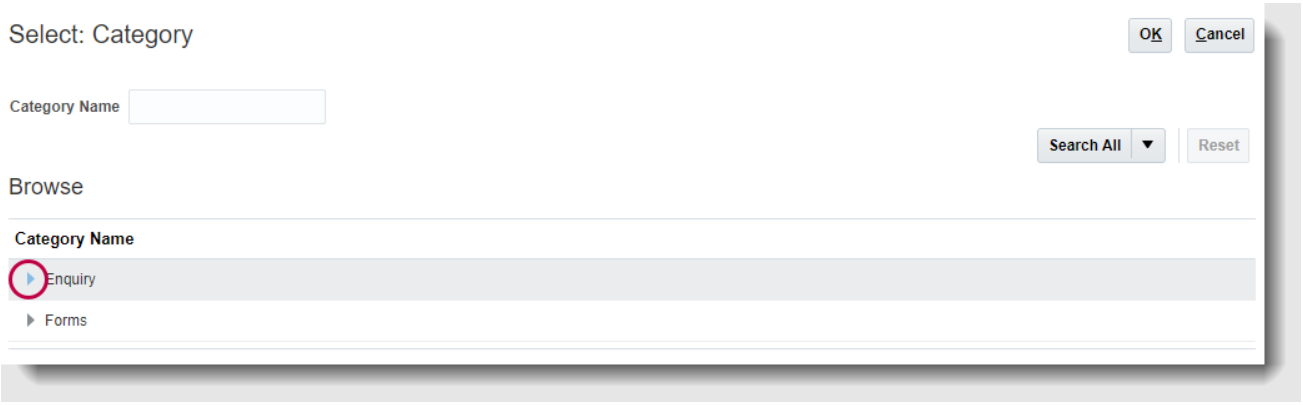


5. To select the **Category,** click on the folder icon at the end of the field. For further information on the use of each category, please refer to the Guide to Service Requests (under the heading of My Knowledge and service requests).

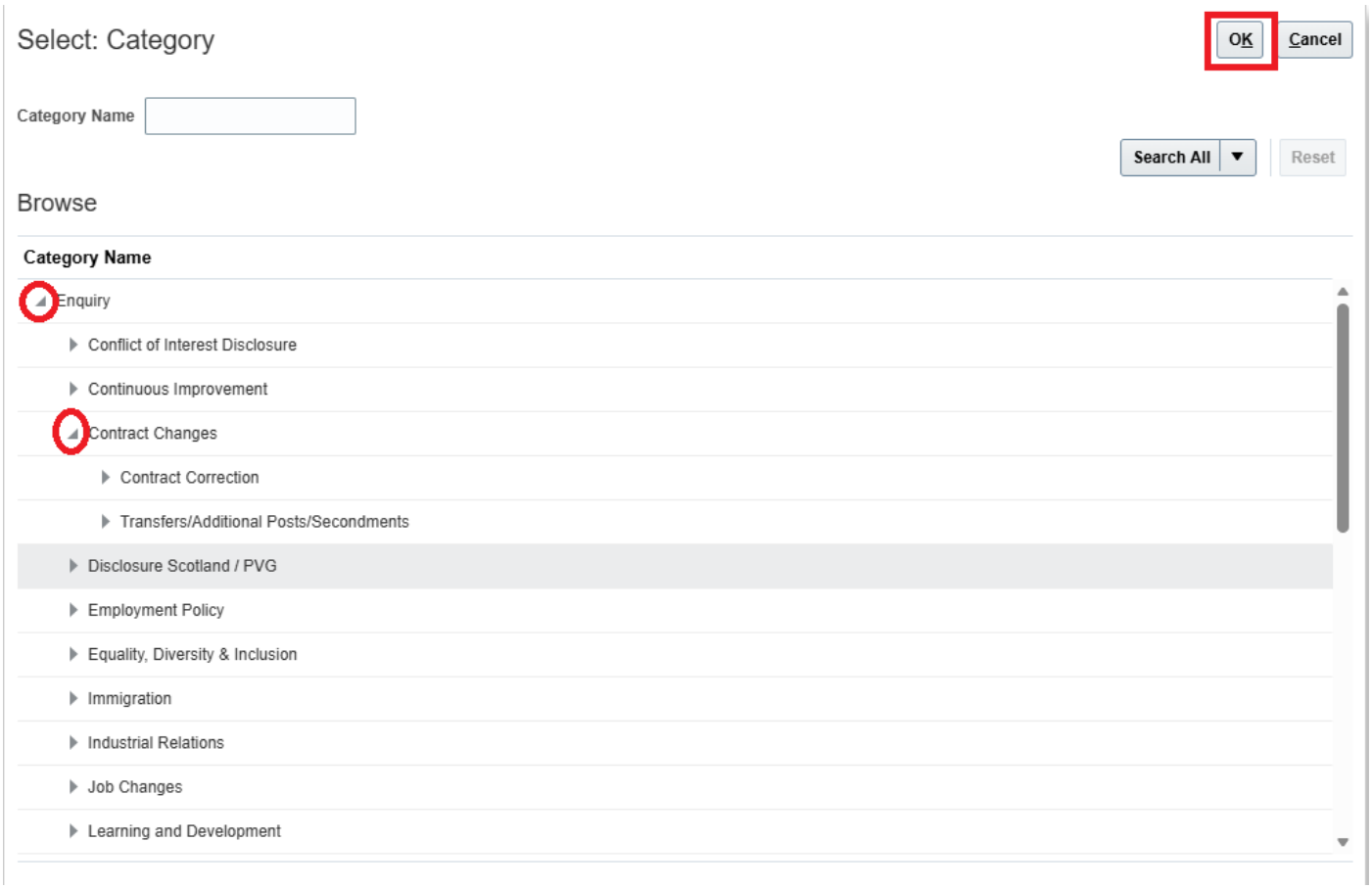


6. If you have an **Enquiry**, see the next step. If you need to complete an online **HR form** jump to Submitting an HR Form Service Request.

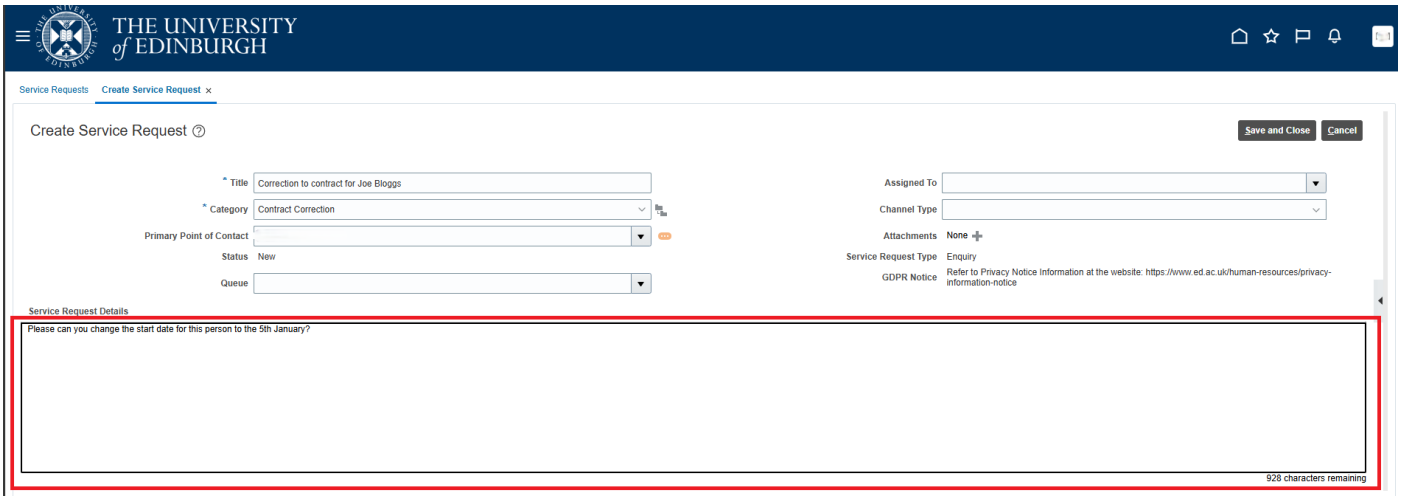
7. In the **Category** window, click on the triangle next to **Enquiry**.



8. 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**.



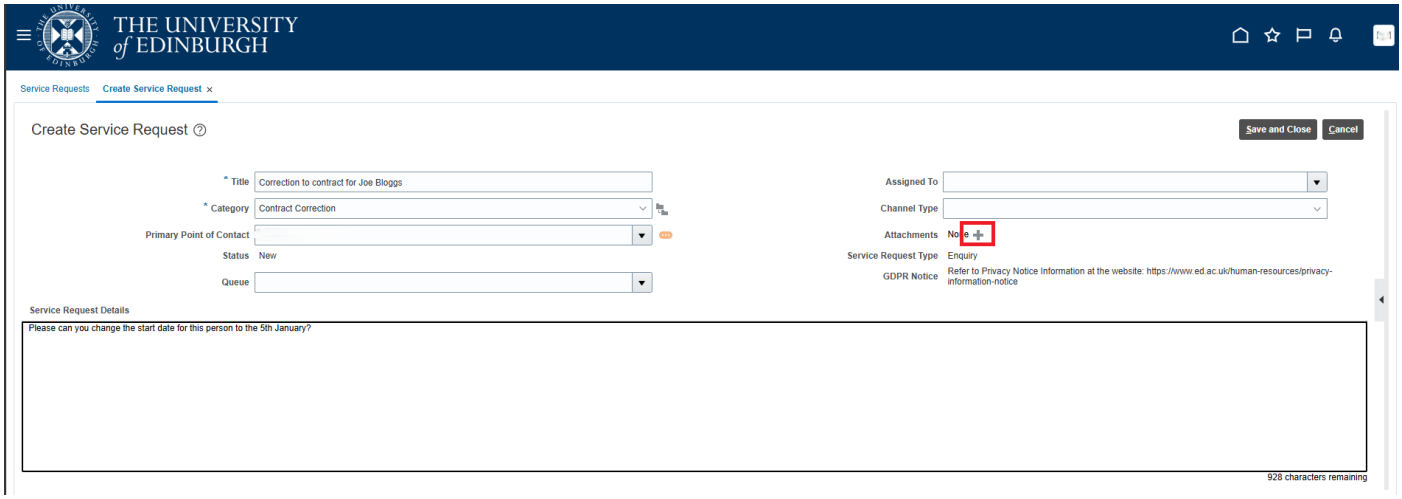
9. Enter your enquiry details into the **Service Request Details** box ensuring you put as much detail as possible.



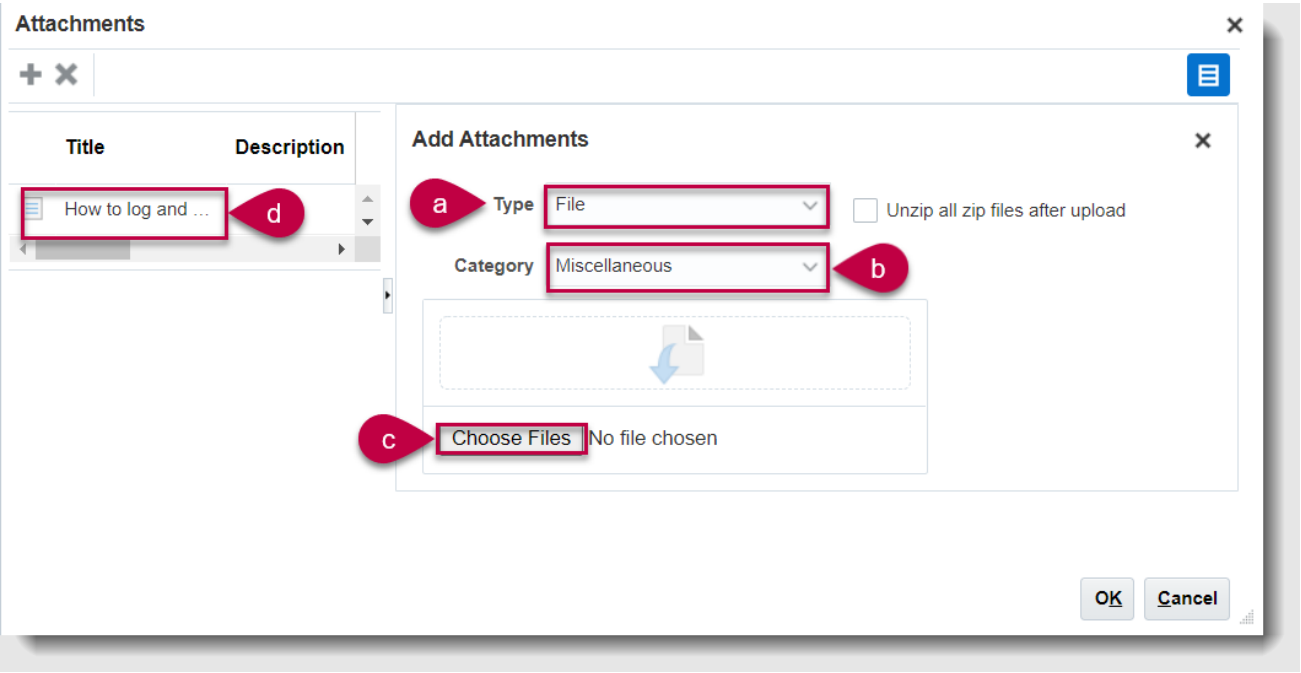
Note: there is a 1000 character limit in this box. If you have a lot of information to provide we recommend you provide an attachment with the full details of your request.

10. If you would like to attach supporting documentation to the request, see the next step. If this does not apply jump to step 15.

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

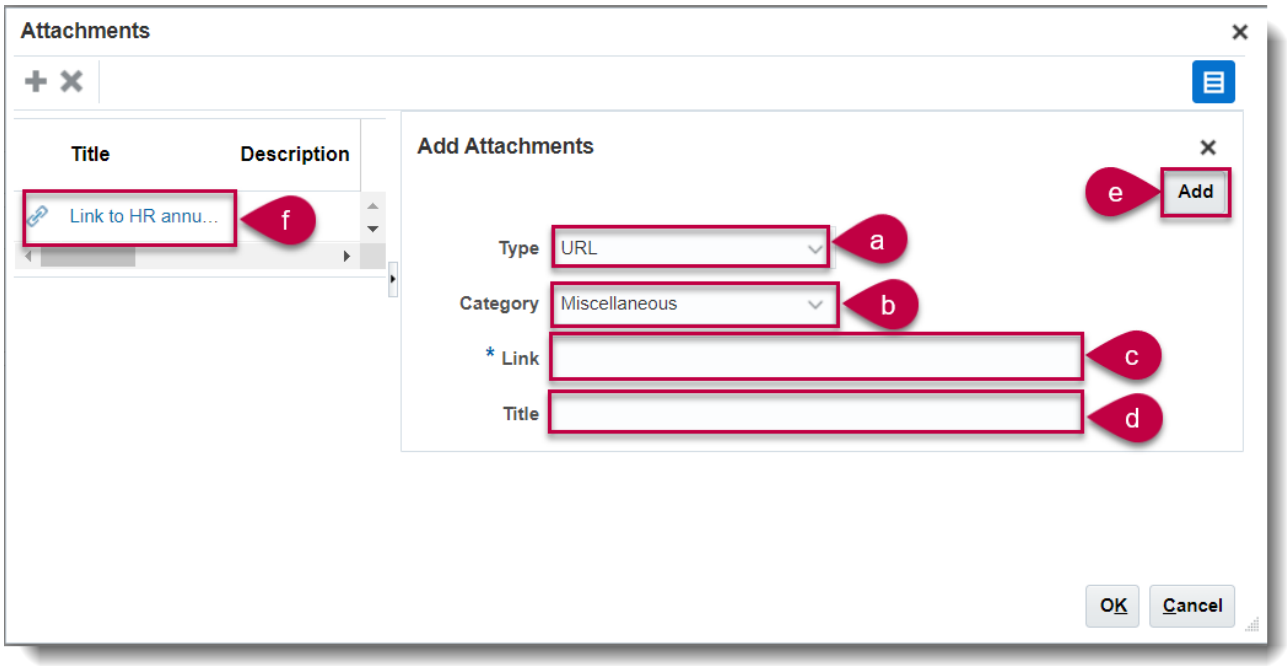


12. To upload a **document** to the service request:
    a. ensure **Type** field is set to 'File'
    b. **Category** field will be set to 'Miscellaneous'
    c. Click **Choose Files** button and navigate to the location where the document is stored and select it.
    d. The filename appears in the **Attachments** window



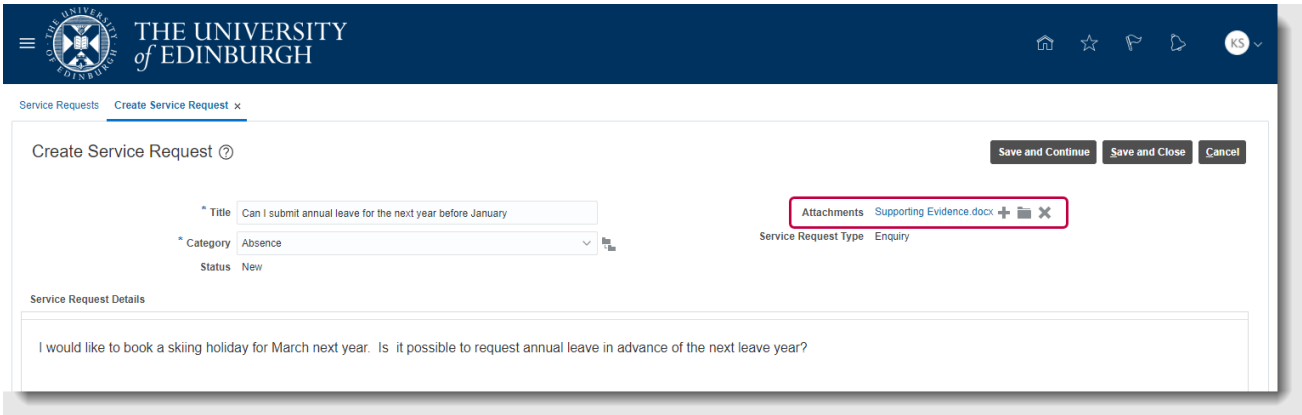
To upload and attach a **link** into your service request:

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).



13. Repeat step 6 until you have uploaded all the requisite documents and when you have finished, click **OK**.

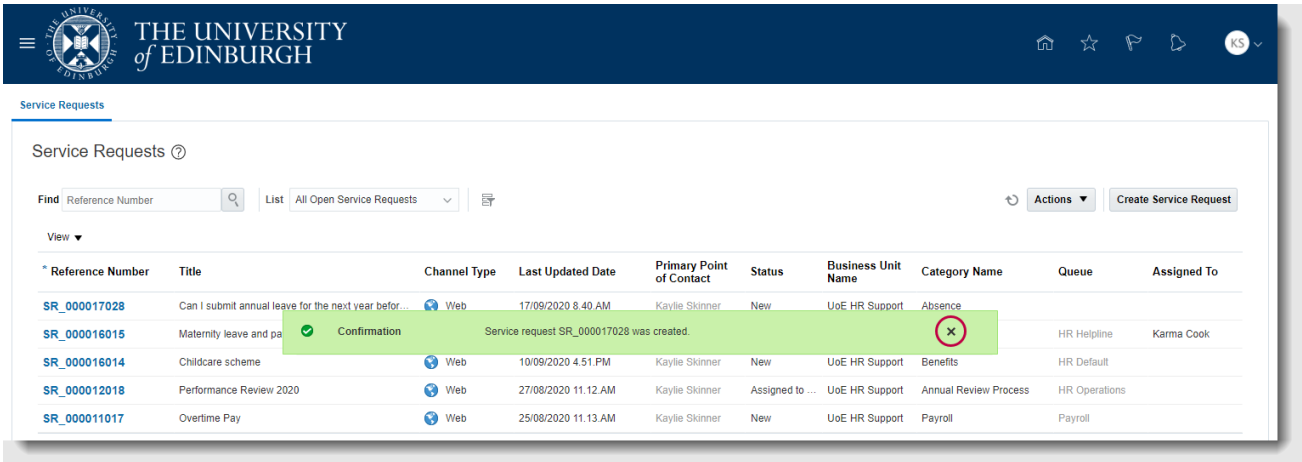
12. The window closes and a link to the attachment(s) appears in the request.



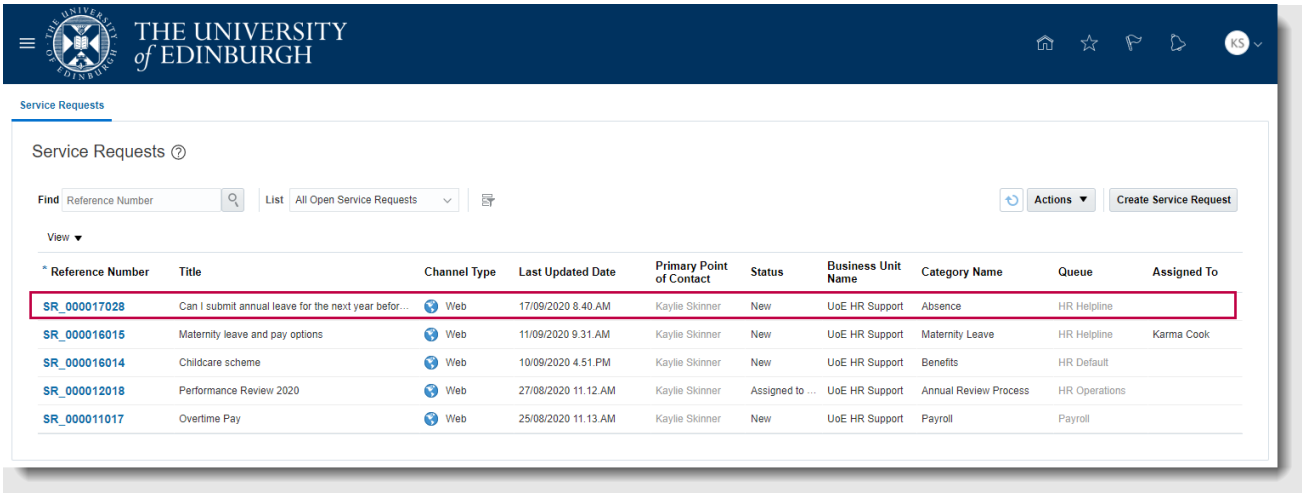
13. **When you are ready to submit,** click **Save and Close.**

14. 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.

    Note: Click on the **X** to dismiss the confirmation message if it does not disappear.



15. 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.

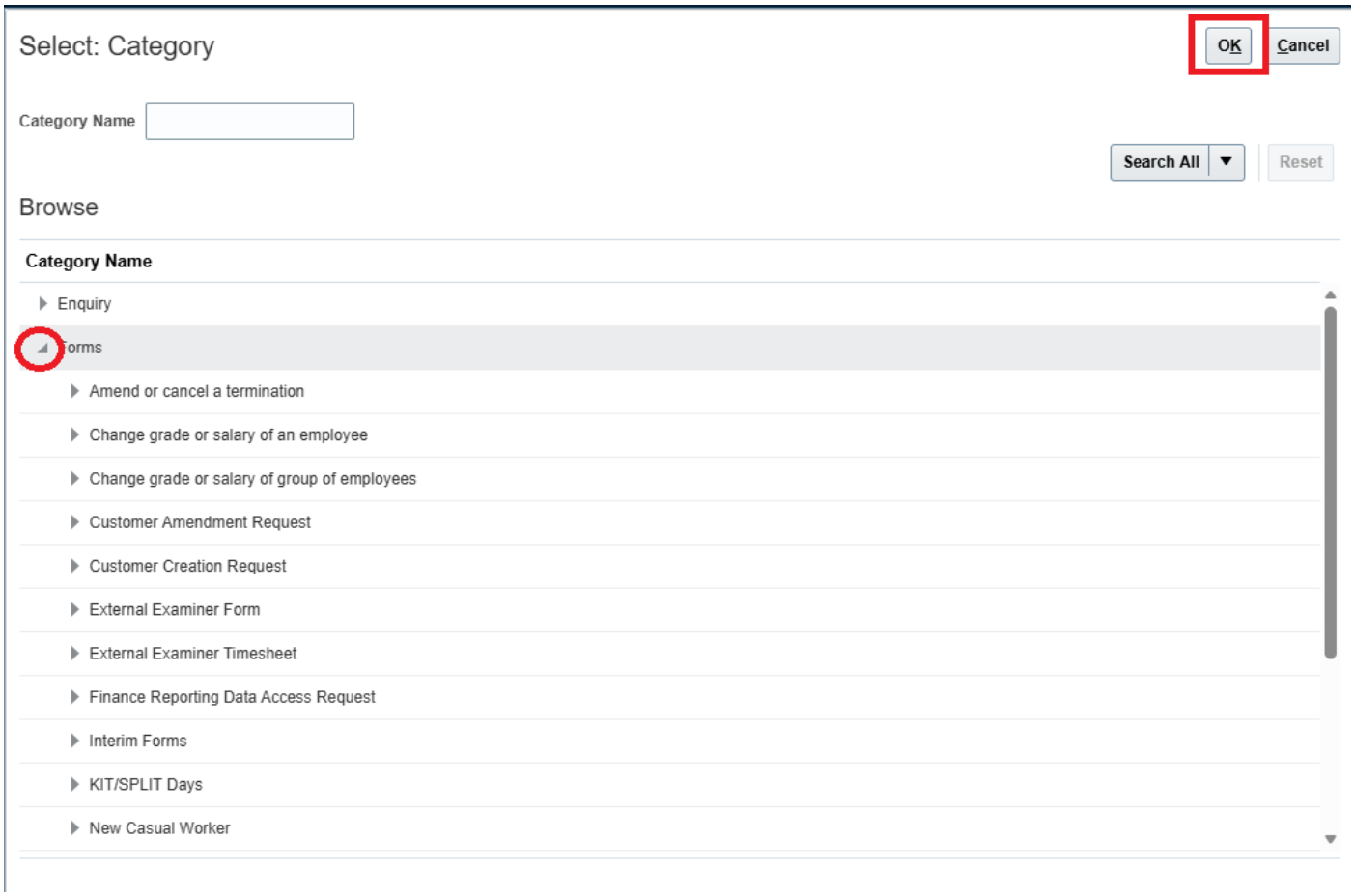


16. You will be notified via email when there is a response to your request. The **Bell** notification symbol also appears in the banner in People and Money to let you know there is something for you to action. See Appendix 1 for a list of SR statuses and notifications.

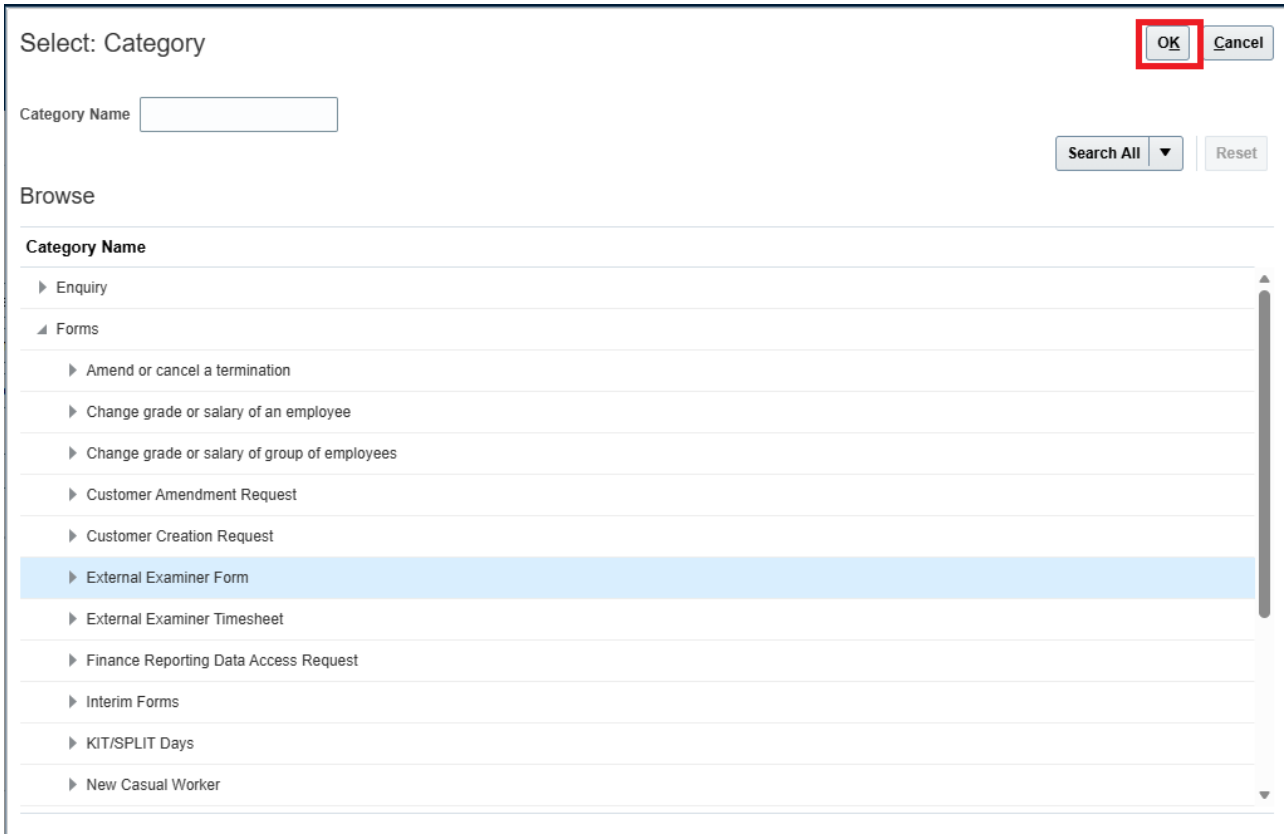
Submitting a HR Form Service Request

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

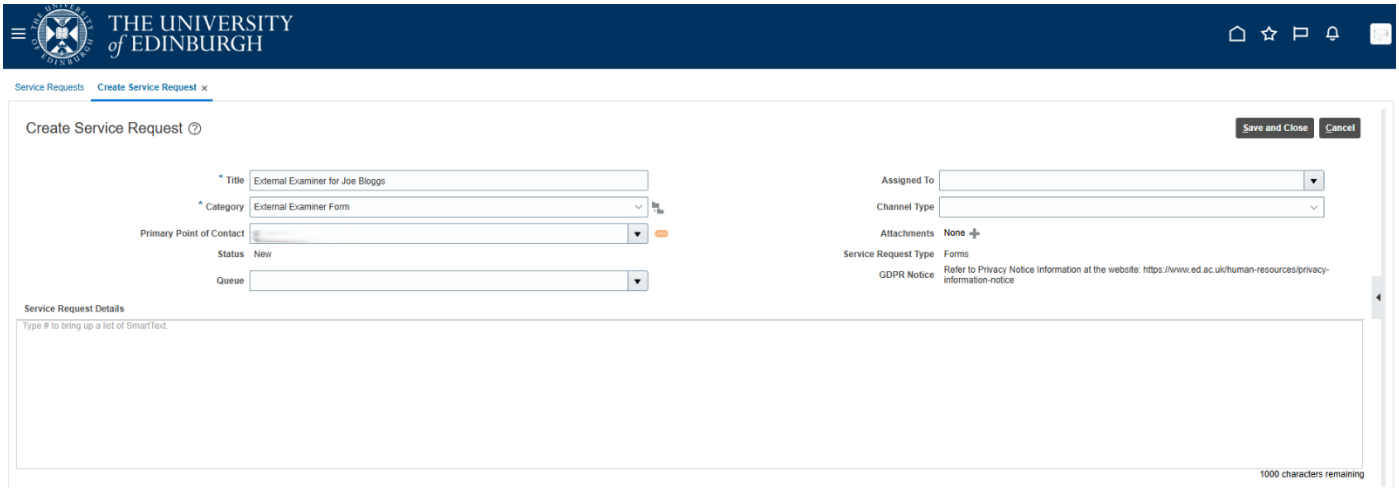
1. Follow the steps in Creating a Service Request and in step 7 click on the triangle next to **Forms** to open the list of HR forms.



2. Select the required form and click **OK**.



3. The form appears on screen for completion with the relevant information.



4. Follow steps 9 to 16 in Creating a Service Request above to continue to enter your enquiry details into the **Service Request Details** box, and any other applicable fields.

Submitting a HR Interim Form Service Request

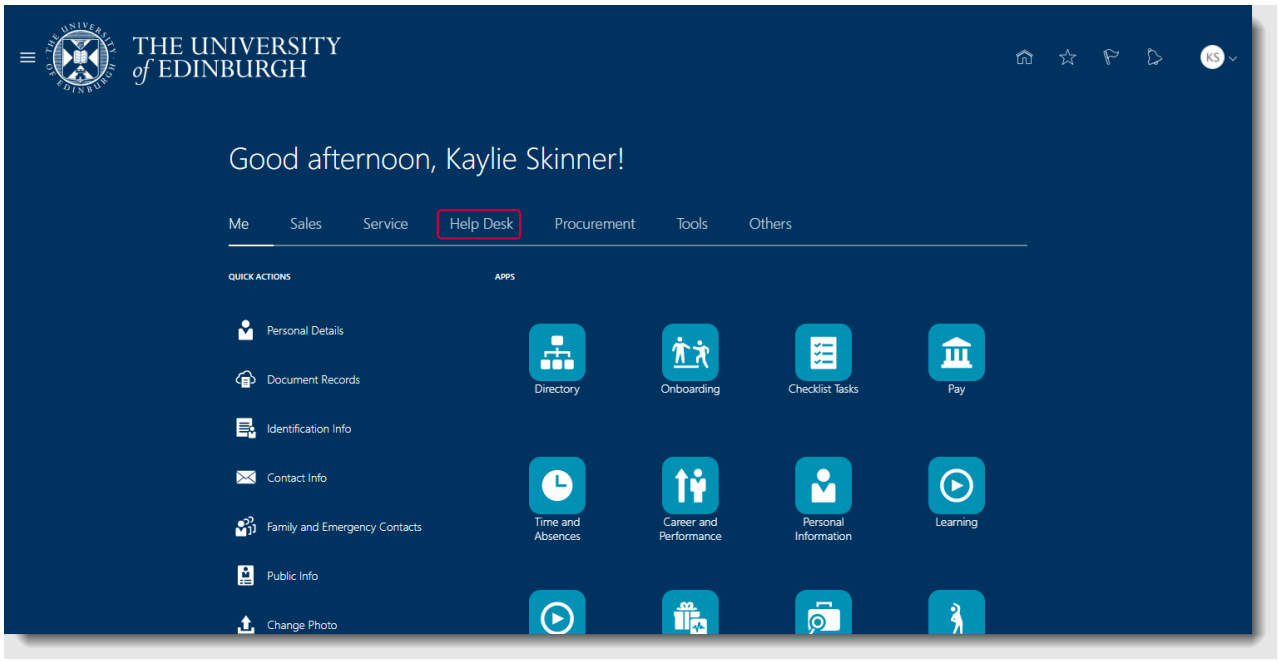
An Interim HR form is submitted in the same way as an Enquiry.

1. Complete the required **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.

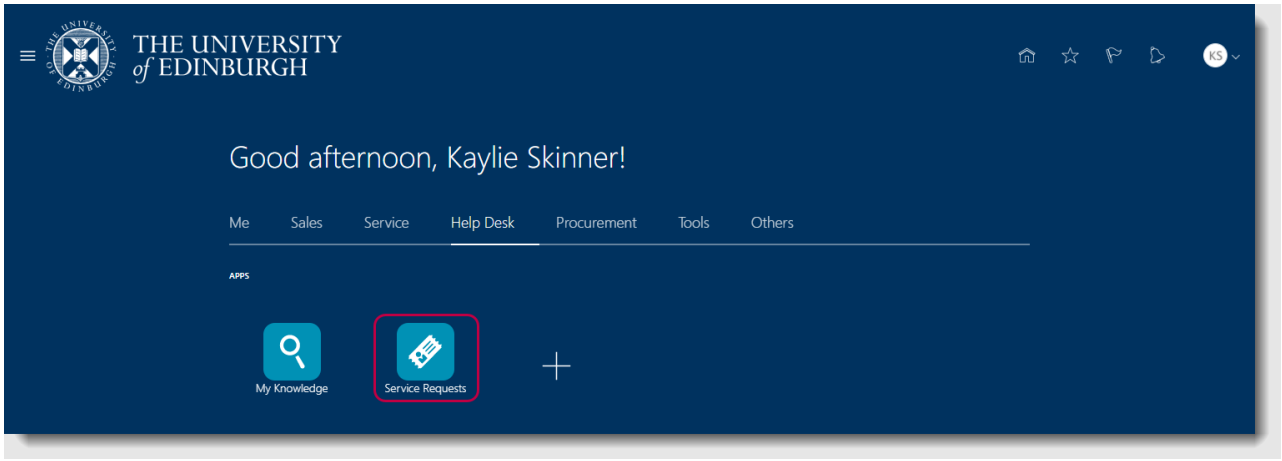
2. Follow the steps in Creating a Service Request and attach the form before submitting your request.

Updating a Service Request

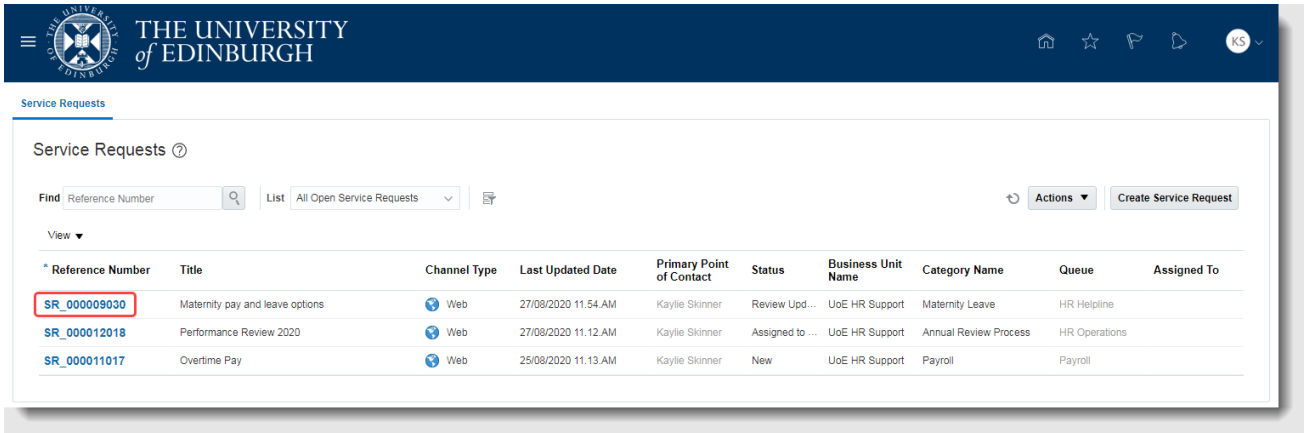
1. From the **Home** page, click on **Help Desk**.



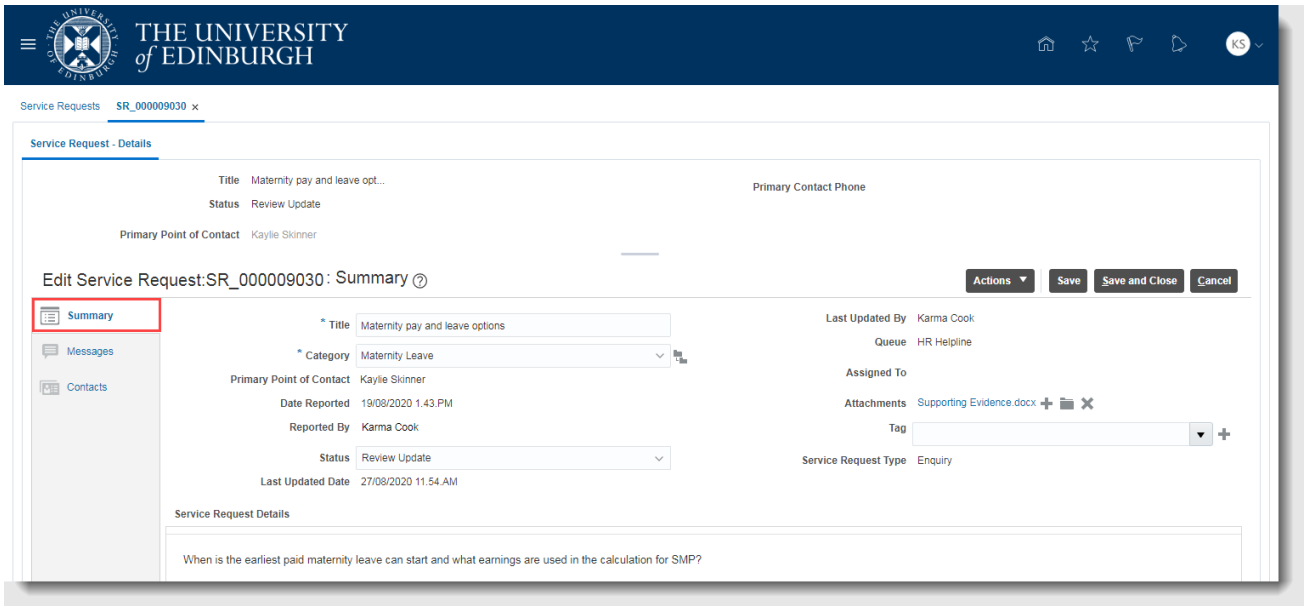
2. Click the **Service Requests** app. The **All Open Service Requests** list is displayed and shows your open requests.



3. Click on the relevant **SR Reference Number** to view the request details.

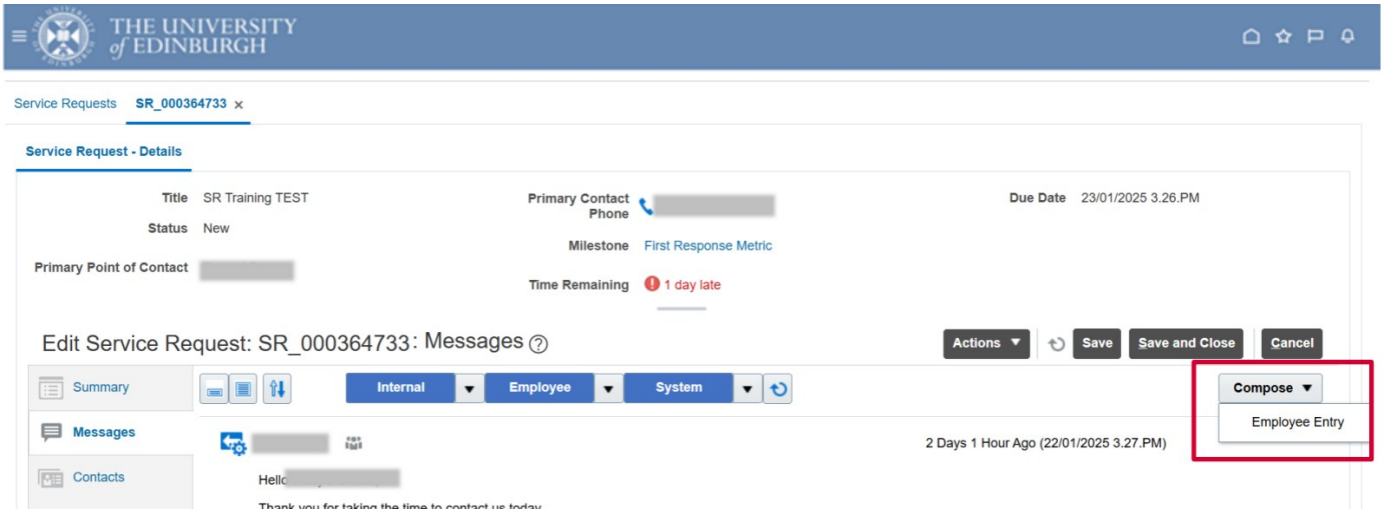


4. The request opens in the **Summary** tab.

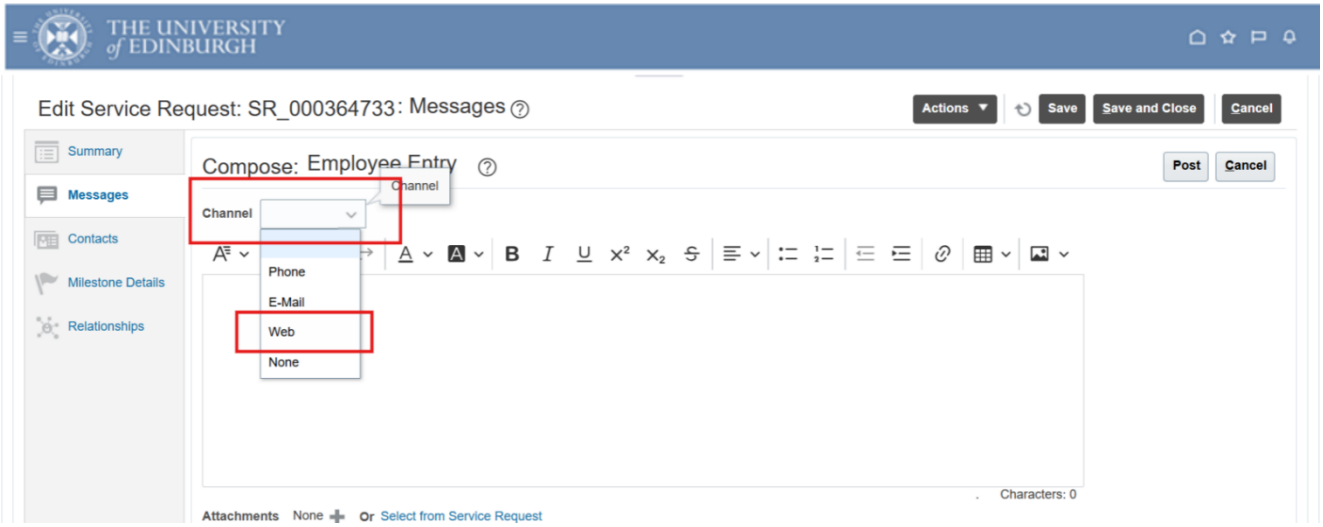


5. Click on the **Messages** tab to read a response you have been sent or view any previous messages in the Service Request.

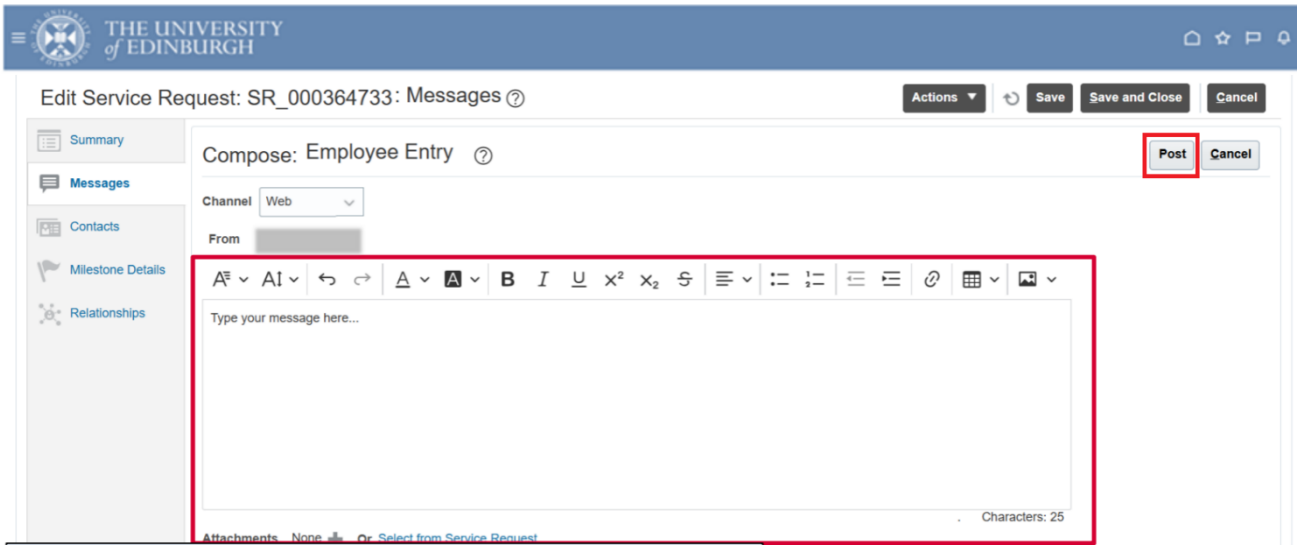
6. To reply to a message, click on the **Compose** button, followed by the **Employee Entry** option.



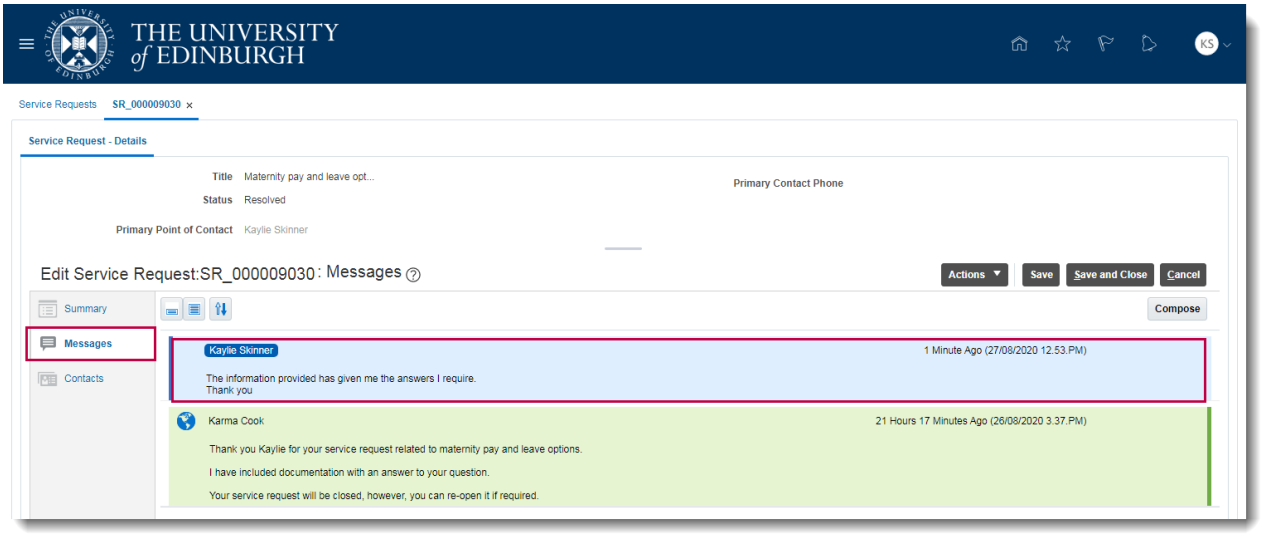
7. Click the **Channel** dropdown and select the **Web** option for response.



8. Enter your response in the text box and click **Post** to send the message to the assigned team.

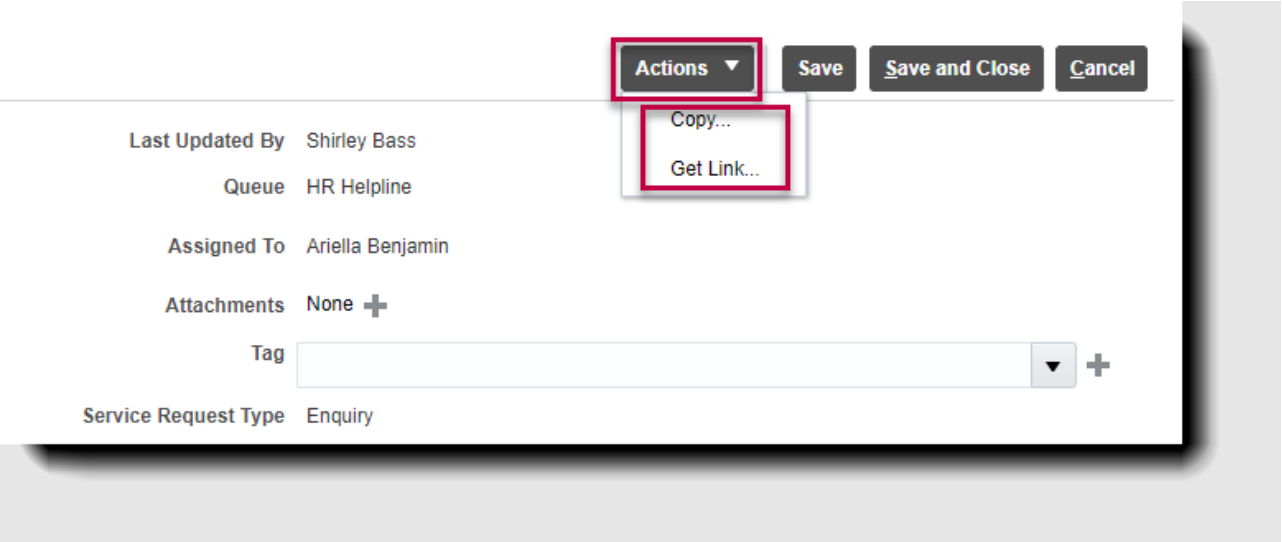


9. The text box closes and your reply is displayed in the **Messages** tab.



The request is returned to the assigned individual to action, and repeated updates can be made until a resolution is reached. The status of the SR will automatically change to **Review Update**.

10. 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”.



Actions	
Copy	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.
Get Link	Creates a direct link to your Service Request which you can then add into an email or another Service Request.

Appendix 1 - Statuses and Notifications

SR Status	Trigger Type	Description	Explanation of Status	Notifications
New	System Auto generated	New SR Raised	• Employee or HR manually creates SR within system and triggers New SR • Employee sends external email and triggers New SR	Acknowledgement notification automatically sent to the Primary Point of contact.
In Progress	Manual Trigger	SR is being worked on by HR	• When operator requires further information or instruction from another team before going back to customer.	No notification automatically sent.
Assigned to Specialist	Manual Trigger	SR is moved to Specialist Queue	• HR assigns SR to Specialist team for resolution and manually updates status to Assigned to Specialist.	No notification automatically sent.
Waiting	System Trigger	HR responds to SR	• HR realises that they need some additional information from the enquirer or want to provide an update/further response back to the enquirer. So, they respond back on the SR. The system auto flips the status to Waiting.	No notification automatically sent.
Review Update	System Trigger	Enquirer responds back on SR	• When an update/reply is completed by enquirer back to HR. The system auto flips status to Review Update.	No notification automatically sent.

Resolved	Manual Trigger	HR resolves SR	• HR is satisfied the SR is resolved and manually sets the status of SR to Resolved. • Status can auto update to Resolved after 30 days if there has been no response from the enquirer.	Notification automatically sent to confirm resolution of Service Request.
Closed	Auto Task	System sets Resolved SR's to Closed after 365 days	• After 30 days of the SR being Resolved, the system will flip the status of the SR to Closed.	No notification automatically sent.

Version History

Version	Date	Description	Approved By
1.0	February 2026	• Updated guide to new format • Updated screenshots • Updates to appendix 1	RM

Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.