UCDAVIS
SHARED SERVICES CENTER

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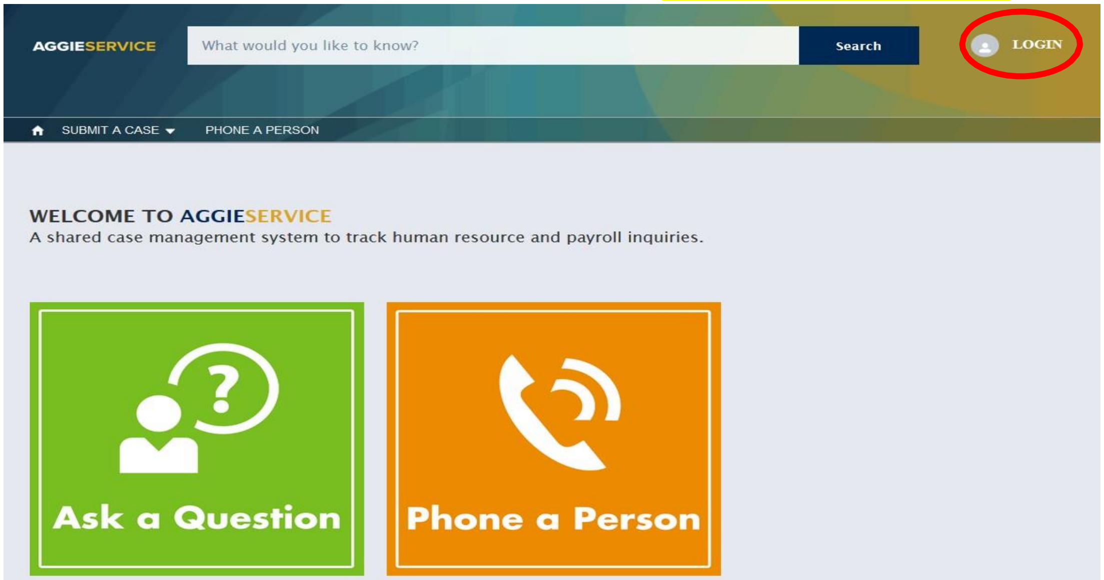
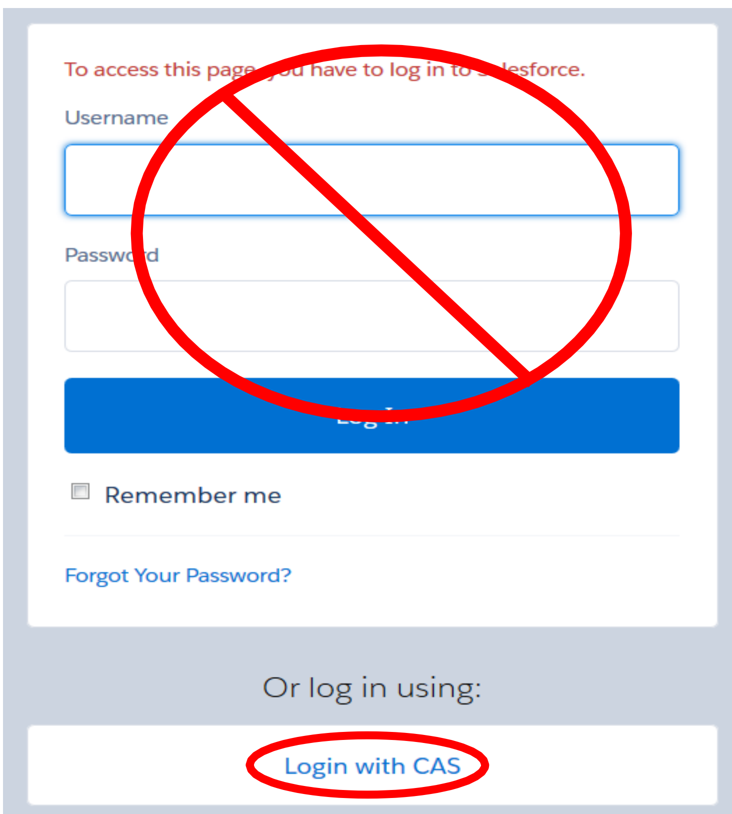
Email feedback to: aggieservice@ucdavis.edu

1. **URL & Login** - https://aggieservice.ucdavis.edu FIREFOX OR CHROME



   a. DO NOT use the login boxes, this will generate an error message.



b. Instead, click the "Login with CAS" link, which will take you to your Kerberos login page.

2. **Submitting a Case** – From the Community Portal ONLY.

a. Attempting to submit cases from the "New Case" option within your case view will generate an error message.

b. Submit on behalf of "Myself", your campus email should be automatically generated.

c. Submit on behalf of another if asked to do so or if you are a TES employee.

   1. If submitting on behalf of another, agree to the disclaimer and enter that employee's campus email address.

d. Choose a topic and note the additional choices are different based on your chosen topic.

e. Any field with an "*" is required.

f. Cases will route based on the home department code in the following order:

   1. Affected Employee

   2. Point of Contact

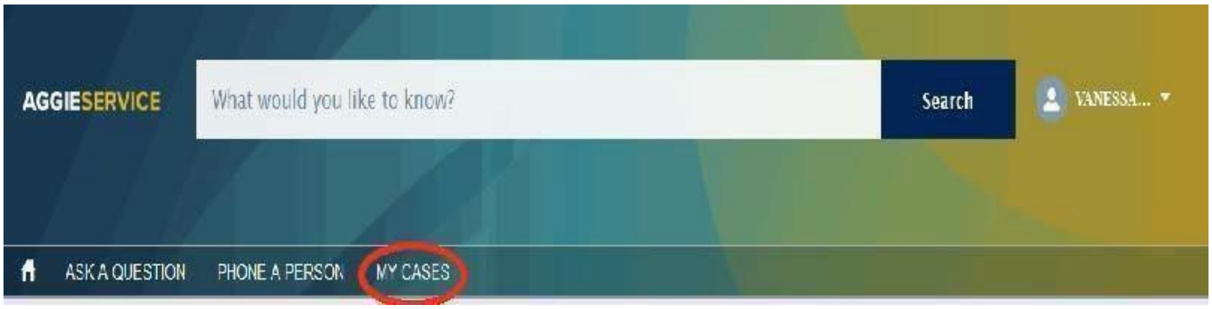
   3. Submitter.

      i. The following requests will route based on the hiring or new home department code if one has been entered. Please note this field is not required.
      Recruitments, Onboarding Only (HR), and Transfer from Dept. to Dept.

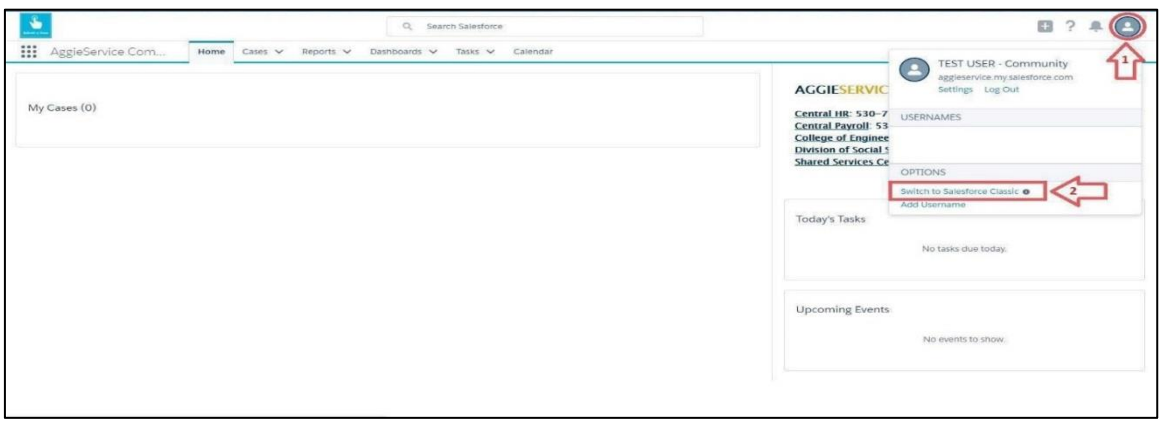
2. **Client Reference Tag –** The reference tag or reference field was created specifically for clients as an editable field that clients can add to their list view to easily differentiate between cases. Only submitter's have the capability of editing that field.

3. **Adding Watchers to a Case** – When entering a case, in the "Anything else you'd like us to know?" box, enter the names of anyone you would like added to the case as a watcher. The service provider will add them to the Case Team as a Watcher.

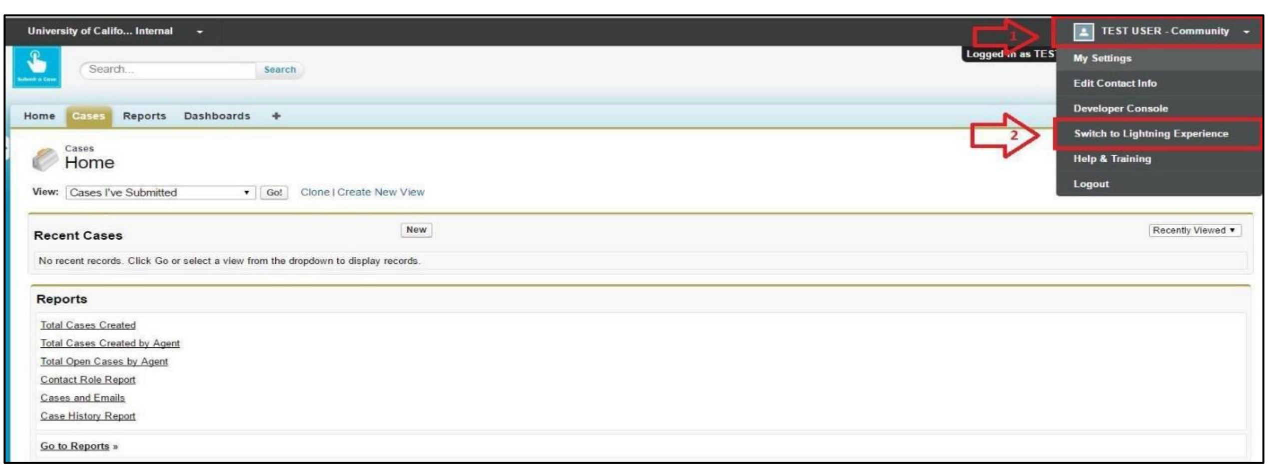
4. **Viewing Cases** – My Cases (top middle of the screen from the Community Portal), once in Lightning view, click on “Cases,” then the dropdown next to the yellow suitcase, switch to “Cases I’ve Submitted”.



5. **Switching Between Classic and Lightning View**
   a. **Switching from Lightning to Classic:**
      i. Select the person icon in the upper right corner.
      ii. Select “Switch to Salesforce Classic”.



   b. **Switching from Classic to Lighting**:
      i. Select your name in the upper right corner.
      ii. Select “Switch to Lightning Experience”.



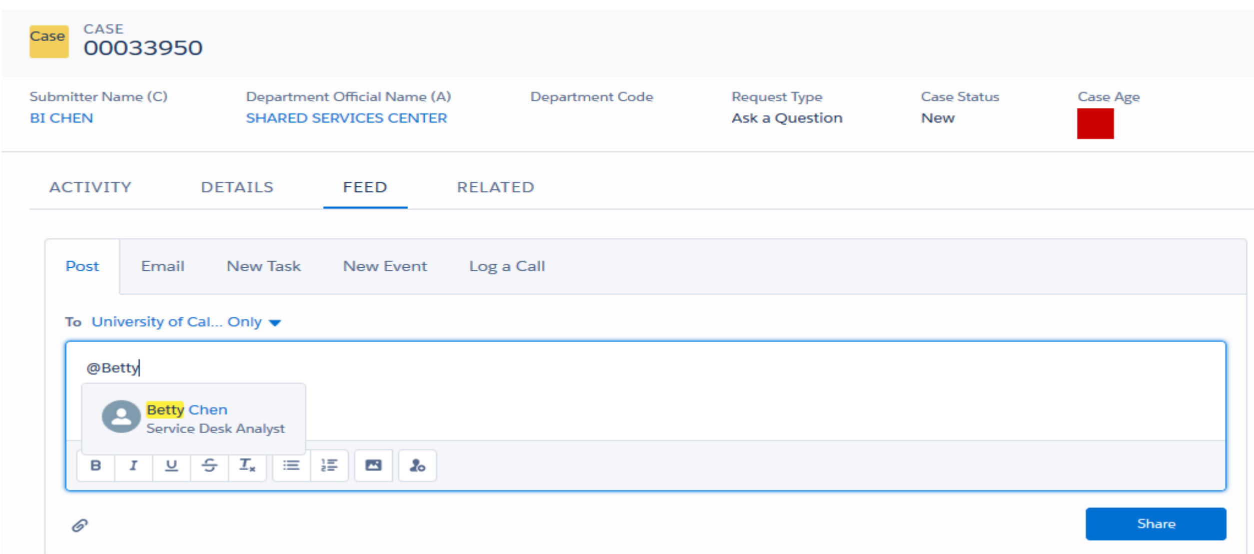
6. Communicating with your service provider within a case:

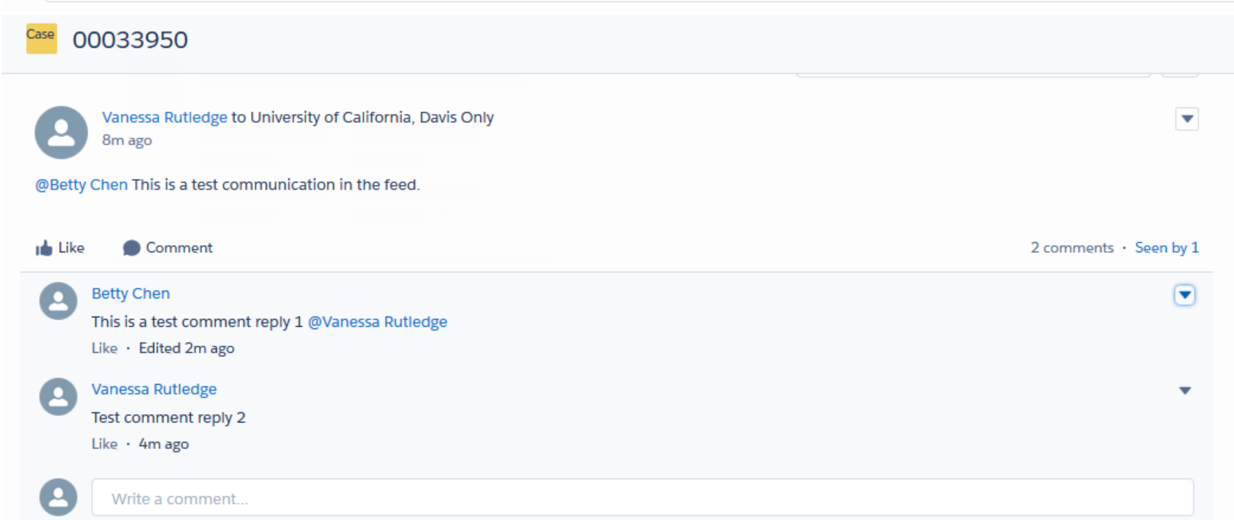
a. In your opening comment @mention your service provider, or the person you are addressing and they will receive an email notification of the comment.

i. Once you type @ and begin typing the name of the person you are addressing, you will see a list appear of potential contacts, simply click the appropriate name.

ii. After the initial comment in a string, you will not need to continue @mentioning the person with whom you are communicating; however, you will both continue to receive email notifications of communications (for that string only).

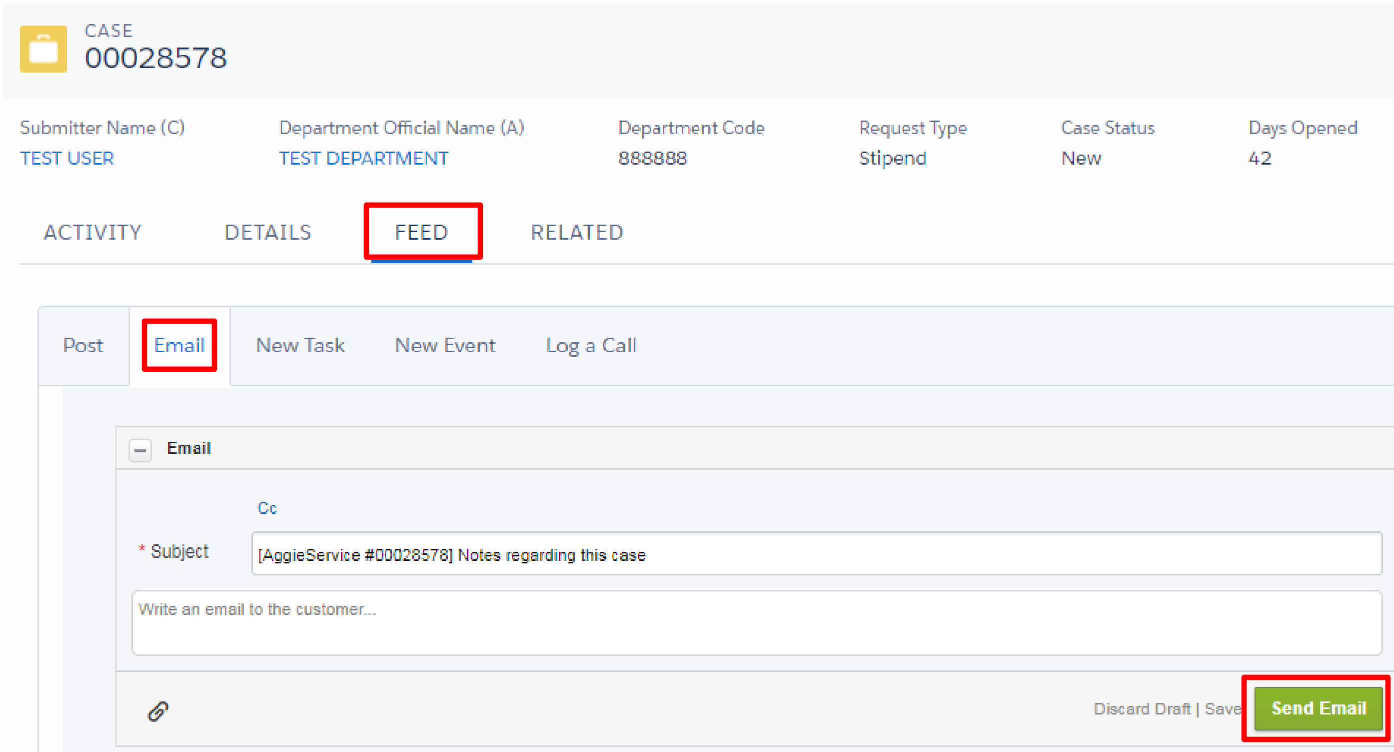
iii. A communication "string" starts with an initial communication and each additional communication will reside below and to the right of the initial communication and will be a very light shade of gray.



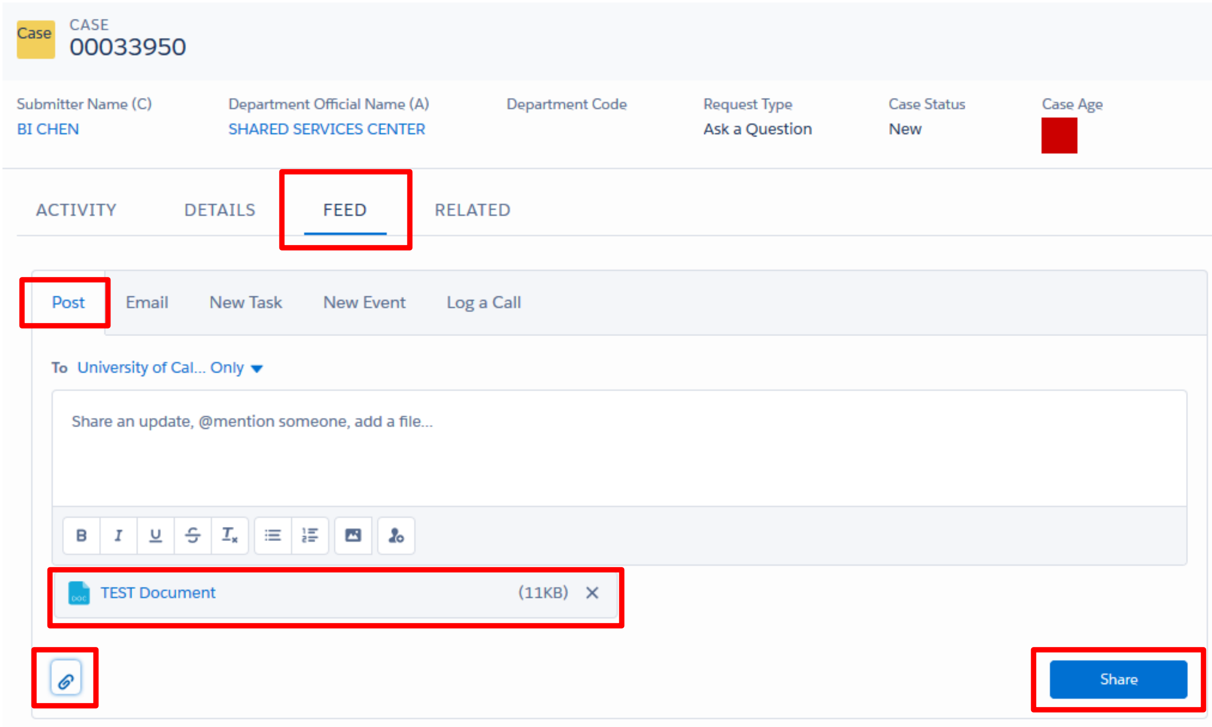


a. You may also respond to your email notification. You will find your response in the communication string shown above.

7. **Emailing your service provider –**
   a. In the “Feed” section, click “Email”
   b. Click “+” and add any additional contacts in the “CC” section.
   c. After typing your message and attaching any documents, click “Send”.



8. **Case Attachments** – You may attach multiple documents to a case.
   a. In the “Feed” click “Post”
   b. At the bottom corner, click the paperclip
   c. Click “Upload Files”
   d. Attach multiple documents by holding down the “Ctrl” key and click “Open”
   e. Find your documents attached just above the paperclip
   f. Click “Share”

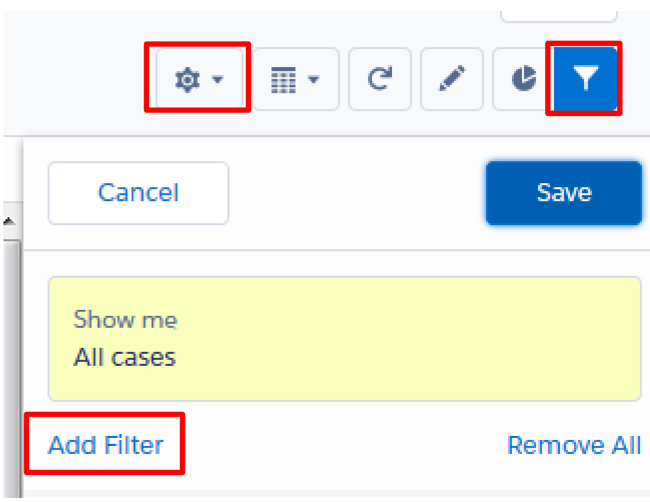


9. **Creating a New View** –

   a. At the top right of the screen, click the dropdown arrow next to the gear icon and click "New".

   b. Name your new view (whatever you would like, it will only be visible to you), click "Save".

   c. Click the "Show me" box and change the filter to "All cases", click "Done" and click "Save".



   d. Click the filter icon and click on "Add Filter".

   e. From the "Field" select "Case Status".

   f. Under "Operator", choose "Not Equal To".

   g. Under "Value" choose "Closed".

   h. Click the gear icon again and choose "Select Fields to Display" and choose from the "Available Fields" what you would like to move into "Visible Fields".

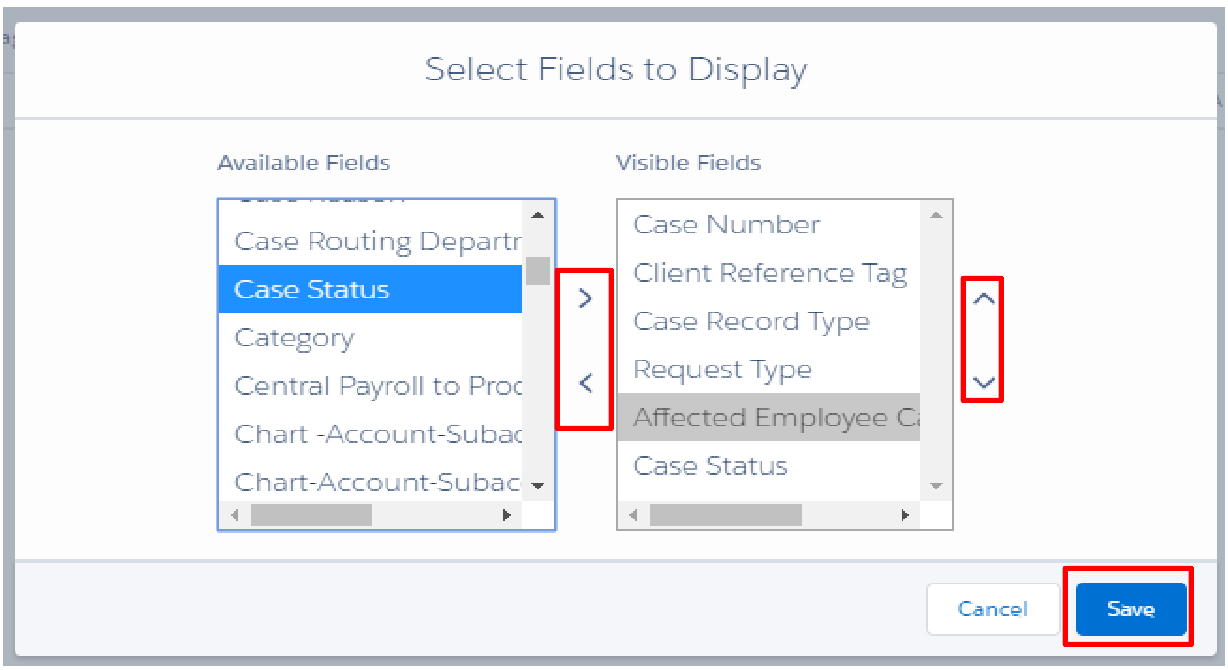
i. Highlight your choices (select multiple by holding down the "Ctrl" key) and choose the right facing arrow to move them over.

j. Remove any unwanted fields by selecting them from "Visible Fields" and using the left facing arrow to return them to the "Available Fields" box.

k. Next, change the location of the fields by highlighting them and using the up or down arrows. Remember that the top choice will be the first field on the left and will move to the right, the further down they are in the "Visible Fields" box.

   i. I recommend leaving the case number at the top, which means it will be the first field you see on the left side of your screen.

   ii. You may wish to see the "Client Reference Tag", "Case Record Type," "Request Type," "Affected Employee," and even the "Case Status" fields so you can quickly differentiate between cases.



If you have any additional questions or concerns, please call us at the Service Desk (530) 754-4772 and we will be happy to assist you.