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Logging in to AggieService

URL: aggieservice.ucdavis.edu recommended browsers are Firefox or Chrome.

Select “Login with CAS” to enter your UC Davis kerberos and password.
Submitting a Case
Select the “Submit a Case” button to begin.

Your campus email address should be listed. If not, please select “Not you? click here”.

Point of Contact  A point of contact can view the case details and receives communications regarding the case
## Topic Requests

| Human Resources | ● Personnel File Management  
|                 | ● Recruitment / Position Management  
|                 | ● Stipends / Equities  
| Payroll         | ● Alt HDC Access / HDC Update  
|                 | ● Appointment Changes/Separation  
|                 | ● Funding Changes/Payments / Workstudy  
|                 | ● Central Payroll General Inquiry  
|                 | ● Timesheet Changes  

**Adding Watchers to a Case**

In the “Is there anything else you’d like us to know about this request?” box, enter the names of anyone you would like added to the case as a watcher. Service providers can also add watchers after the case is submitted.

**Client Reference Tag**

The reference tag was created specifically for clients to enter a personal short description. The submitter can edit this field.

**Case routing**

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

1. Affected Employee  
2. Point of Contact  
3. Submitter

**Exceptions:**

- Recruitments - Department Code field  
- Onboarding Only - Department Code field
Viewing Cases

Click on the “My Cases” link.

Switching Between Classic and Lightning

**Benefits of Lightning**
The bell icon at the upper right corner indicates notifications and approval requests.

**Benefits of Classic**
Clients can add case comments and email their service provider within the case.

**Switch from Classic to Lightning**

**Switch from Lightning to Classic**
**Classic**

To view cases, select the “Cases” tab. Next, select “Cases I’ve Submitted”.

Click on a case number to view the case details. If on the feed, click on “Details” to view information. The functionality of feed is currently under review.

Example of the case details page.
Case Comments

Case comment(s) is the recommended form of communication. Under the case comments section, select “New”.

Type comment in the box and click “Save”. No need to check the “Public” box. Comment will be recorded and timestamped.

The submitter and point of contact are notified when an service provider enters a comment. Service providers are notified when a submitter or point of contact enter a comment.
Email

Typically, service providers will send clients emails through the system. Clients can reply directly from Outlook. The email option is available for clients who want to initiate the first email.

Under the email section, select “Send an Email”.

The email template is set up for service providers as they will most often use this functionality.

For clients please:

1. Delete name from the “To:” field.
2. Look for the recipient name using the lookup tool or type in the email address in the “Additional To:” field.
3. Type in the case number in the subject line.
4. Attach file if necessary.
5. Type email message and click “Send”

Email will be recorded and timestamped.
Case Attachments

The case submitter may attach additional documents to the case. Select “Case Attachments” at the top of the details page.
Drag and drop file to the outlined box or click to browse file. Select “Back to Case” when finished.

The file will be available under the “Attachments” tab. Alternatively, the “Attach File” button works as well. However, the convenient drag and drop feature is not available under the “Attach File” button.

**After attaching a document, please enter a case comment to notify the service provider.**

List Views

Under the cases tab, select “Create New View”.

Step 1: Name your view, this will only be visible to you.
Step 2: Filter by all cases (all cases you have visibility to).
Step 3: Filter by additional fields. *(Optional)* Use the lookup tool when available.
Filter examples:

- Case status - not equal to - Closed
- Approval status - equals - In Process

Step 4: Remove/Add Fields you wish to see. *(Optional)*

**Commonly Used Fields:**

<table>
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<tr>
<th>Client Reference Tag</th>
<th>Case Record Type</th>
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<tr>
<td>Case Status</td>
<td>Affected Employee Name (C)</td>
</tr>
<tr>
<td>Owner Name</td>
<td>Hiring Department</td>
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Case Approvals

Cases with the lock icon are pending departmental approval. Service providers are unable to edit the case prior to approval.
Cases that route for approval:

- Recruitment
- Onboarding
- Stipends / Equities
- Star Awards
- Separation
- Reclass / Position Update

Lightning

To view cases, select the “Cases” tab.

Use the drop down arrow to select “Cases I’ve Submitted”.
Select “Details” to view case information. Recent activities are located on the right hand side.

We are currently reviewing the full functionality of Lightning. For now, SSC clients are recommended to use case comments in the classic view for communication. Please be advised service providers may not be notified of communication done through Lightning or Feed.

Visit our SSC website for additional information on AggieService. 
http://ssc.ucdavis.edu/aggieservice/index.html

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