AggieService Training

Client Users
## Project Background

<table>
<thead>
<tr>
<th>Why AggieService</th>
<th>Replace SSC ServiceNow and DSS/CoE systems, scalable campus-wide, in preparation for UCPath</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits</td>
<td>End-to-end visibility between departments, central offices and Shared Services, efficiency, data integration*, escalation, metrics, increased customer satisfaction</td>
</tr>
<tr>
<td>Who’s using it</td>
<td>Central Payroll, Central HR, Div. of Social Sciences, College of Engineering, SSC, clients, anyone at UC Davis</td>
</tr>
<tr>
<td>Where to give feedback</td>
<td><a href="mailto:aggieservice@ucdavis.edu">aggieservice@ucdavis.edu</a></td>
</tr>
<tr>
<td>After Go Live, future phases</td>
<td>Continuous improvement, sprints, enhancements</td>
</tr>
</tbody>
</table>

* Payroll Personnel System (PPS), People Admin, Kuali Financial System (KFS), Banner, Identity & Access management (IAM) and Five9 Phone system
Access AggieService website from the Shared Services Center home page

- AggieService Home
- Service Lines
- User Groups
- FAQ
- Testimonials
AggieService Website – Home Page

AggieService Case Management System

The AggieService case management system will track all human resource and payroll transactions for clients of the Shared Services Center, Division of Social Sciences and College of Engineering. Even if you are not a client of these units, all UC Davis employees can use AggieService to ask a question, report a problem or get access to a live person for help with:

- Talent acquisition and recruitment
- Reclassification and compensation
- Payroll
- Benefits

Subscribe to receive updates on the AggieService project

Infographic

What is AggieService?
Who does it affect?
What are people saying about it? Learn more with this helpful infographic.

View the full infographic

User Groups

AggieService user groups and AggieService testing and training schedule

Read more

Request service: Online | E-mail | Phone: 530-754-4772

Privacy & Accessibility | Sitemap | Last update: October 2, 2016
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AggieService Website – Service Lines

AggieService Training

The AggieService case management system will track all human resource and payroll transactions for clients of the Shared Services Center, Division of Social Sciences and College of Engineering.

AggieService will replace the Shared Services Center’s use of ServiceNow. It will also replace homegrown systems used in the Division of Social Sciences and College of Engineering.

All other UC Davis employees can use AggieService to ask a question, report a problem or get access to a live person for help with recruitment, reclassification, payroll and benefits.

More service lines are being added to AggieService post launch, so please check back for updates.

If you're unsure if this affects you, then please contact us at aggieservice@ucdavis.edu or call the help desk at 530-754-4772.

Infographic

What is AggieService? Who does it affect? What are people saying about it? Learn more with this helpful infographic.

View the full infographic

SIGN-UP
Subscribe to receive updates on the AggieService project

SUBSCRIBE
AggieService Website – User Groups & Project Schedule

AggieService User Groups

AggieService will serve all employees of the university.

The AggieService case management system will track all human resource and payroll transactions for clients of the Shared Services Center, Division of Social Sciences and College of Engineering.

If you are not a client of these units, then you will use AggieService to submit questions or report a problem related to talent acquisition, payroll, compensation and benefits.

To ensure users are properly trained and ready to use the new system, the following testing and training schedule has been developed.

User Training and Onboarding Schedule:

GROUP 1: Training week of Oct 17; Start using Oct 24

Users:
- Accounting and Financial Services
- Administrative IT
- Bodega Marine Laboratory
- Budget and Institutional Analysis
- College of Biological Sciences
- College of Engineering
- Division of Social Sciences
- Graduate Studies
- Student Housing and Dining
- Temporary Employment Services

Service Providers:
- College of Engineering
- Division of Social Sciences
- Human Resources
- Payroll Office
- Shared Services Center

GROUP 2: Training week of Oct 31; Start using Nov 7
AggieService Website – FAQ

Frequently Asked Questions

- What is AggieService?
- What will change for clients of the Shared Services Center, College of Engineering and Division of Social Sciences?
- Who exactly can use AggieService?
- How long does it take to get my question answered?
- What kinds of questions can I ask in AggieService?
- I'm a Shared Services Center client, when will I receive training on how to use the system?
- Will the old Case Management System (CMS) be retired?
- Will AggieService be easier to use than the current CMS?
- I use the current CMS often, will I be part of the train-the-trainer sessions?
- I asked a question and haven't gotten an answer, what do I do?
- I want to talk to a live person, can I do that instead?
- How do I report a problem with the AggieService system itself?
- Why AggieService and why now?
There are 3 User Interfaces for AggieService

1. **Community Portal** – For submitting Cases – accessible at aggieservice.ucdavis.edu
2. **Lightning** – For viewing cases you have submitted – accessible at aggieservice.my.salesforce.com
3. **Classic** – For reviewing case comments and emailing your Service Provider
Reminder for Today/This week

- Live Production System
- Do not submit cases today/this week while viewing the system
Access to AggieService – Any User

Use Firefox or Chrome browsers only
Search Bar – Discussions

Results for "Recruitment"

Nothing here yet?
Login to comment on this post

Don't see what you're looking for?
Ask the Community  Contact Service Desk

Sort By icon
Search Bar – Articles

RESULTS FOR "RECRUITMENT"

- Full Cycle End-to-End Recruitment
  Assistance in the talent acquisition process from start to finish.

- Background Check
  Steps to requesting a Background Check
AggieService – Ask a Question

WELCOME TO AGGIE SERVICE
A shared case management system to track human resource and payroll inquiries.

Ask a Question
Phone a Person

For more information, go to the AggieService project website or email us at aggieservice@ucdavis.edu | UC Davis
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Ask a Question
Suggest a Knowledge Article
Report a Problem
AggieService – Phone a Person
Phone a Person

Active Links to Websites

Central HR: 530-752-0530
Central Payroll: 530-752-7750
College of Engineering: See the directory
Division of Social Sciences: See the directory
Shared Services Center: 530-754-4772
Client Login

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Case Submittal - Clients

WELCOME TO AGGIESERVICE
A shared case management system to track human resource and payroll inquiries.

- Ask a Question
- Submit a Case
- Phone a Person

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Entering a Case – for yourself

Submit a Case

Point of Contact

WELCOME TO AGGIE SERVICE
Please enter your campus email address below:
Campus Email *

Are you submitting this case on behalf of yourself or another employee? *
- Self
- Another Employee

Choose a Topic *
- General Inquiry
- Human Resources
- Leaves
- Payroll

Cancel Next
Entering a Case – for another employee
Submit a Case Screens

- **General Inquiry same as Ask a Question**
  - Ask a Question
  - Suggest a Knowledge Article
  - Report a Problem

- **Human Resources**
  - Personnel File Management
  - Recruitment/Position Management
  - Stipends/Equities
Submit a Case Screens, continued

- **Leaves Cases**
  - 15 Leave Options

- **Payroll Cases**
  - Alternate Home Department Code Access/HDC Update
  - Appointment Changes/Separation
  - Funding Changes/Payments
  - Payroll General Inquiry
  - Timesheet Changes
Example – Expanding Options when buttons selected

## Recruitment/Position Management

<table>
<thead>
<tr>
<th>Affected Employee Information</th>
<th>Affected Employee Information</th>
<th>Affected Employee Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Type</strong> *</td>
<td>* Academic</td>
<td>* Staff</td>
</tr>
<tr>
<td><strong>Request Type</strong> *</td>
<td>* Additional Employment</td>
<td>* DMV Pull Notice Program Update</td>
</tr>
</tbody>
</table>
Additional Information – Every Page

Clicking the AggieService Logo takes you to the Case Submittal Page

Hyperlink: Need assistance with this form? provides information for contacting help directly
Case Submittal Confirmation & Email

Thank you for submitting a Personnel File Management case with AggieService. A Service Provider will contact you within 1 business day.

[Click here](#) to submit another case.

---

Dear [Submitter],

Thank you for your request submission. Your case details are as follows:

Case #00002932
Case Type: Personnel File Management

An AggieService support team member will respond to you within one business day.

Sincerely,

Aggieservice
Email to Case

coe-hr@ucdavis.edu
aggieservice@ucdavis.edu
pahelp@ucdavis.edu
benefits@ucdavis.edu
compensation@ucdavis.edu
dsshr@ucdavis.edu
payroll@ucdavis.edu
sschelp-aggieservice@ucdavis.edu
taes@ucdavis.edu
applicanthelp@ucdavis.edu
Errors

The form is not complete and has not been submitted yet. There are 2 problems with your submission.

Employee Campus Email: sdjohnson@ucdavis.
This does not appear to be a valid email address.

Request Type: Funding Change
One-Time Payment

Supervisor's Campus Email: lterry@ucdavis.edu

One Time Payment Type: STAR Award
This field is required.

Attach STAR or UPAY form: Choose File | UAT Upload Document 2.docx
Object code is included in the form(s).
Requested Payment Date: 11/01/2016
Logging Into AggieService Cases

1. https://aggieservice.my.salesforce.com
Landing Page – Lightning

Takes you back here
Lightning – Cases – Default to “Recently Viewed”

Use drop down to select View you want

<table>
<thead>
<tr>
<th>CASE NUMBER</th>
<th>SHORT DESCRIPTION</th>
<th>CASE RECORD TYPE</th>
<th>CASE STATUS</th>
<th>DATE/TIME OPENED</th>
<th>CASE OWNER ALIAS</th>
</tr>
</thead>
<tbody>
<tr>
<td>00002963</td>
<td>Here is the short description field.</td>
<td>Onboarding Only (HR)</td>
<td>Closed</td>
<td>9/20/2016 1:27 PM</td>
<td>mmagnew</td>
</tr>
<tr>
<td>00004282</td>
<td>Longevity/Special Recognition</td>
<td>In Process</td>
<td></td>
<td>10/27/2016 3:00 PM</td>
<td>awebber</td>
</tr>
<tr>
<td>00004003</td>
<td>Timesheet Changes</td>
<td>Closed</td>
<td></td>
<td>10/25/2016 2:06 PM</td>
<td>bubba1</td>
</tr>
<tr>
<td>00004108</td>
<td>Separation</td>
<td>Closed</td>
<td></td>
<td>10/20/2016 8:39 AM</td>
<td>bubba1</td>
</tr>
<tr>
<td>00004003</td>
<td>Timesheet Changes</td>
<td>Closed</td>
<td></td>
<td>10/25/2016 2:44 PM</td>
<td>annicks</td>
</tr>
<tr>
<td>00002790</td>
<td>Report a Problem</td>
<td>Closed</td>
<td></td>
<td>10/24/2016 9:20 AM</td>
<td>annicks</td>
</tr>
<tr>
<td>00004212</td>
<td>Central Payroll</td>
<td>Closed</td>
<td></td>
<td>10/27/2016 9:16 AM</td>
<td>annicks</td>
</tr>
<tr>
<td>00003867</td>
<td>Separation</td>
<td>Closed</td>
<td></td>
<td>10/26/2016 12:30 PM</td>
<td>annicks</td>
</tr>
</tbody>
</table>
Lightning – Click on Case Number hyperlink to view case
Switching to Classic

Why?
- Easier to view cases
- Can email Service Provider in Classic View
- Personal preference
Switching to Classic

- Select Profile Icon near top right
- Select “Switch to Salesforce Classic from drop down
Classic View
Case Details

Case Number: 00003903
Created Date: 10/24/2016 3:04 PM

Case Status: Closed
Days Opened: 2
Case Record Type: Additional Employment
Request Type: Additional Employment

Submitter Name: DENISE BESSER
dmbesser@ucdavis.edu

Case Owner: Michelle Jacobs
Case Number: 00003903
Department Code: 040112
Category: Division of Social Sciences

Employee Name
Point of Contact Campus
Email

Affected Employee Name
Affected Employee Campus Email
Case Details

- Case detail fields differ based on type of case
- View Case Owner (Service Provider) comments
- View all Case details
Responding to and Sending an Email through a case

- Reply from Case Details, or click on email hyperlink
- Send new, unrelated, but linked to Case, email by clicking Send an Email
Responding to an Email through a case

- Leave watermark, etc.
- Reply to All would be to entire case team if more than just the owner
Initiating Email to Service Provider through Case

- Scroll down in case
- Click on Send An Email button
Initiating Email to Service Provider through Case

- Leave Case Number in Related To field
- Populate fields for recipients
- Enter Subject
- Click Send
Changing Case Views

Recent Cases

<table>
<thead>
<tr>
<th>Case Number</th>
<th>Date/Time Opened</th>
<th>Account Category</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>00002128</td>
<td>9/22/2016 10:40 AM</td>
<td>Shared Services Center</td>
<td>Payroll</td>
</tr>
<tr>
<td>00003693</td>
<td>10/21/2016 12:26 PM</td>
<td>Shared Services Center</td>
<td>Human Res</td>
</tr>
<tr>
<td>00002210</td>
<td>9/22/2016 11:54 AM</td>
<td>Shared Services Center</td>
<td>Payroll</td>
</tr>
<tr>
<td>00002018</td>
<td>9/22/2016 9:41 AM</td>
<td>Shared Services Center</td>
<td>General Inq</td>
</tr>
<tr>
<td>00002173</td>
<td>9/22/2016 11:33 AM</td>
<td>Shared Services Center</td>
<td>Leaves</td>
</tr>
</tbody>
</table>
Create New View

[Image: Screen capture of the AggieService Training interface showing the process to create a new view, highlighting the steps for entering view name and specifying filter criteria.]
Create New View

- Add and Remove fields you want/don’t want in your view
- Can “search” fields by typing first letter of field
- Sort by top
- Good idea to leave Case Number and always have it at top
- Click Save
Viewing Team Cases

- Select “All Open Cases” from View drop down
- To see specific types of or cases by owner, “Create New View”
Reports and Dashboards

- Available in AggieService
- Canned Reports available and can create your own
- Dashboards can be created from Reports
- We will be providing more training on Reports and Dashboards once everyone is onboarded and we’ve been in the system for awhile
- Online Resources – You Tube videos – for creating
Creating Calendar Events

- OR -

Create Events in AggieService Calendar from Home tab in “Calendar” at bottom of screen

Create Events specific to a Case from within the Case
Creating Tasks

- Can be created from Home page, at bottom of screen
- Or from within a Case, in Case Activities
- Reminders will pop-up when you log in
- Task reminders will be added to your AggieService calendar
Creating Tasks

<table>
<thead>
<tr>
<th>Task Information</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned To</td>
<td>Status</td>
</tr>
<tr>
<td>Subject</td>
<td>Priority</td>
</tr>
<tr>
<td>Task Title</td>
<td></td>
</tr>
<tr>
<td>Service Agent Name</td>
<td></td>
</tr>
<tr>
<td>Client Disposition</td>
<td></td>
</tr>
<tr>
<td>Call Back Number</td>
<td></td>
</tr>
<tr>
<td>Call Time</td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Phone</td>
</tr>
<tr>
<td></td>
<td>Email</td>
</tr>
</tbody>
</table>

**Select a Subject below:**
- Inquiry
- Follow-up
- Compliment
- Complaint
- Other

**Reminder:**
- 10/26/2016 8:00 AM

**Attachments:**
- No records to display
Hi Sheila, catch up on activity from the past day.

Case: 00001063
Submitter Name: Sheila Johnson
Department: Office of the President, Office of the President, Office of the President
Department Code: 01001
Request Type: Onboarding Only
Case Status: New
Case Age: 0
Days Opened: 17
Date Opened: 9/20/2016

Sheila Johnson changed Case Owner from SSC Operations Quentin to Michelle Agnew.

Yours sincerely,
[Signature]

To change or turn off University of California, Davis email, log in as sgadmin@engineering.ucdavis.edu.
Powered by Salesforce, Inc. The Law Firm @ One Market, Suite 303, San Francisco, CA 94105
Add how to change digest email preferences

- From your Profile icon drop down, select Settings
Add how to change digest email preferences

- From left hand menu, select Chatter
- Then select Email Notifications
Cases In Process in CMS-ServiceNow

- Tickets currently in process in ServiceNow that can be finished by the end of the year will remain in ServiceNow and be completed by your service provider
- You will be notified when your ticket is completed in ServiceNow
- Tickets in ServiceNow that will remain open past December 31 will be manually entered as a Case into AggieService toward the end of December
- You will be notified when your Case is open in AggieService
Other Resources

- Searching Knowledge Base Articles
- Salesforce videos
- Quick Reference Guides – will be emailed to you after training and immediately before go live with AggieService
Thank You

for attending AggieService Training

Questions and Feedback: AggieService@ucdavis.edu