



# **USER GUIDE**

## **OHR**

# **Administrative Requests**

## Table of Contents

Using the Administrative Request Workflow.....	3
Roles and Responsibilities .....	3
Initiating an Administrative Request .....	3
Request Information Tab .....	4
Attaching Documents.....	5
Requestor – Routing Options.....	6
Admin Support Information Tab .....	7
Division Gate Keeper – Routing Options .....	9
Training Approver – Routing Options.....	12
ASB Jr. AO – Routing Options.....	13
ASB Sr. AO – Routing Options .....	13
Administrative Workflow Bizcovers .....	14

# Using the Administrative Request Workflow

The Administrative Requests workflow is used to track the processing of administrative requests across the Office of Human Resources (OHR). As of April 17, 2015, all requests that need to be seen or approved by the Administrative Services Branch (ASB) must be submitted through this workflow.

**Note:** WiTS does not replace any other systems that currently exist for administrative processes. If other system entries are required, be sure you enter those as well.

## Roles and Responsibilities

### Requestor

- Submits the administrative request, or is the person on whose behalf the request is submitted.

### Request Preparer

- The person who is preparing the administrative request and submitting the form.

### Division Gatekeeper

- Submits the administrative request on behalf of requestor, when applicable.
- Reviews administrative request for accuracy, completeness and appropriateness, and then routes to the Workforce Support and Development Division (WSDD) (for training requests only) or to ASB for further action.

### WSDD Training Approver

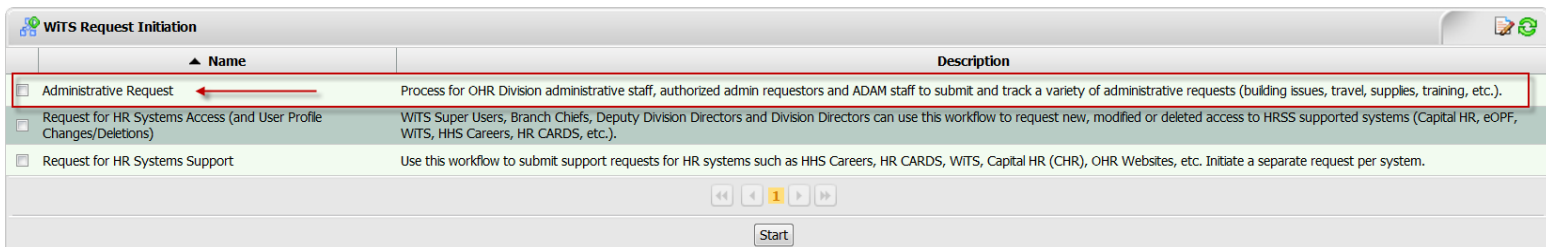
- Reviews all training requests for completeness, appropriateness, and availability of funds, if applicable, and either completes/approves or forwards the request to ASB for further action.

### ASB Jr. and Sr. Admin Officer

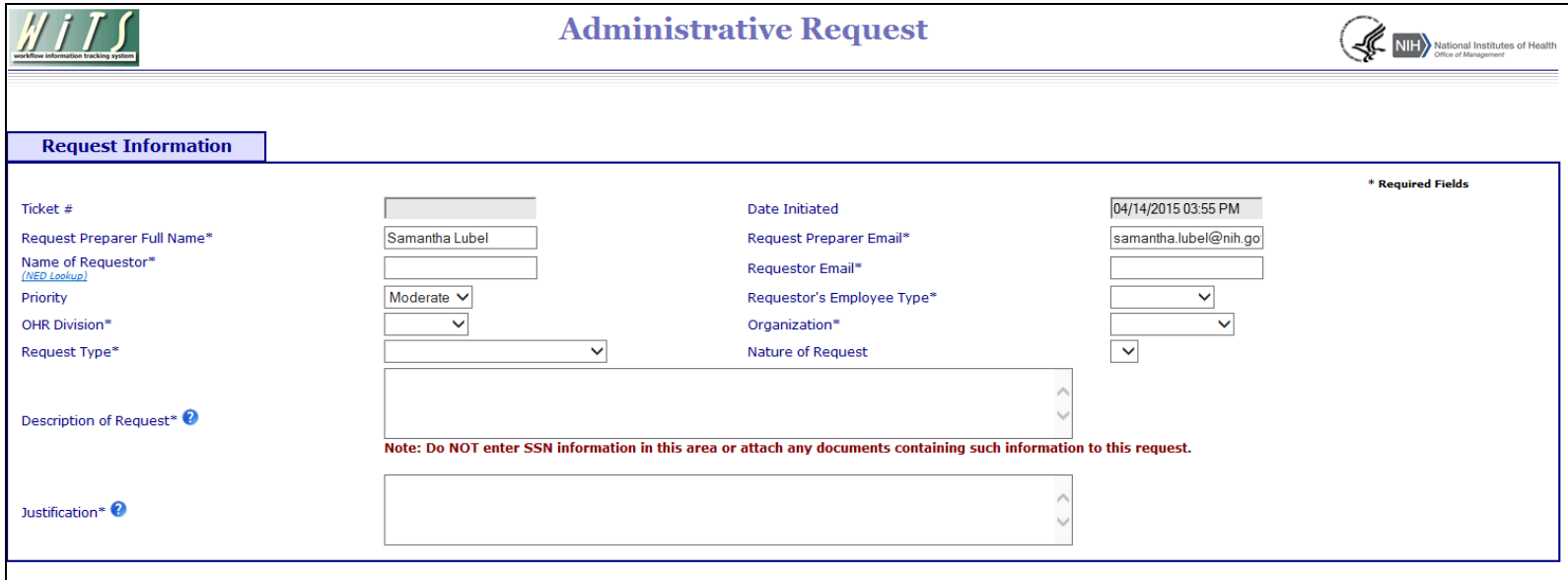
- Reviews all incoming administrative requests and completes, as applicable.

## Initiating an Administrative Request

The Requestor or Request Preparer initiates an administrative request by selecting the Administrative Request process from the WiTS Request Initiation Bizcove at the top of the WiTS Work Area Page.



# Request Information Tab



**Administrative Request**

**Request Information**

\* Required Fields

Ticket #	<input type="text"/>	Date Initiated	<input type="text" value="04/14/2015 03:55 PM"/>
Request Preparer Full Name*	<input type="text" value="Samantha Lubel"/>	Request Preparer Email*	<input type="text" value="samantha.lubel@nih.gov"/>
Name of Requestor* <small>(NED Lookup)</small>	<input type="text"/>	Requestor Email*	<input type="text"/>
Priority	<input type="text" value="Moderate"/>	Requestor's Employee Type*	<input type="text"/>
OHR Division*	<input type="text"/>	Organization*	<input type="text"/>
Request Type*	<input type="text"/>	Nature of Request	<input type="text"/>
Description of Request* ?	<input type="text"/> <small>Note: Do NOT enter SSN information in this area or attach any documents containing such information to this request.</small>		
Justification* ?	<input type="text"/>		

**Ticket #:** Automatically assigned upon saving or submitting your request.

**Date Initiated:** Timestamp of the date/time the form is generated.

**Request Preparer Full Name, Request Preparer Email:** Automatically populated when the form is generated. These fields are editable.

**Name of Requestor:** The NED Lookup feature can be used to populate the Name of the Requestor.

**Requestor Email:** The NED Lookup feature can be used to populate the Requestor's Email Address.

**Priority:** Defaults to *Moderate*, but can be changed to indicate the priority of the action.

**Requestor's Employee Type:** Indicate if the Requestor is a Contractor or Government employee.

**OHR Division:** Select the OHR Division of the Requestor.

**Organization:** Select the Organization of the Requestor.

**Request Type:** Select the appropriate Request Type.

**Nature of Request:** Select the Nature of Request.

**Description of Request:** Provide a description of the request. Please refer to the ASB SOP for guidance on specific information that must be included in this field for each specific request.

**Justification:** Provide a justification for the request. Please refer to the ASB SOP for a list of the types of requests for which a justification is required.

## Attaching Documents

You can attach documents of any type (Word, Excel, PowerPoint, PDF, etc.) to WiTS actions. There is no limit to the size of attached files in WiTS; however, it is recommended that the total size of all files you attach to an action be under 80MB (most attached documents tend to be less than 1MB).

To attach a document, open the left panel window.

The screenshot shows the 'Administrative Request' form in the WiTS system. At the top, there is a navigation bar with options: 'Route this action: [dropdown]', 'Save', 'Save and Close', and 'Exit without saving'. The main header includes the 'WiTS workflow information tracking system' logo and the 'National Institutes of Health Office of Management' logo. The form is titled 'Request Information' and contains several fields: 'Ticket #' (empty), 'Request Preparer Full Name\*' (Samantha Lubel), 'Name of Requestor\*' (empty), 'Priority' (Moderate), 'OHR Division\*' (empty), 'Request Type\*' (empty), 'Date Initiated' (12/22/2015 04:50 PM), 'Request Preparer Email\*' (samantha.lubel@nih.gov), 'Requestor Email\*' (empty), 'Requestor's Employee Type\*' (empty), 'Organization\*' (empty), and 'Nature of Request' (empty). A note below the form states: 'Note: Do NOT enter SSN information in this area or attach any documents containing such information to this request.' There are also fields for 'Description of Request\*' and 'Justification\*'.

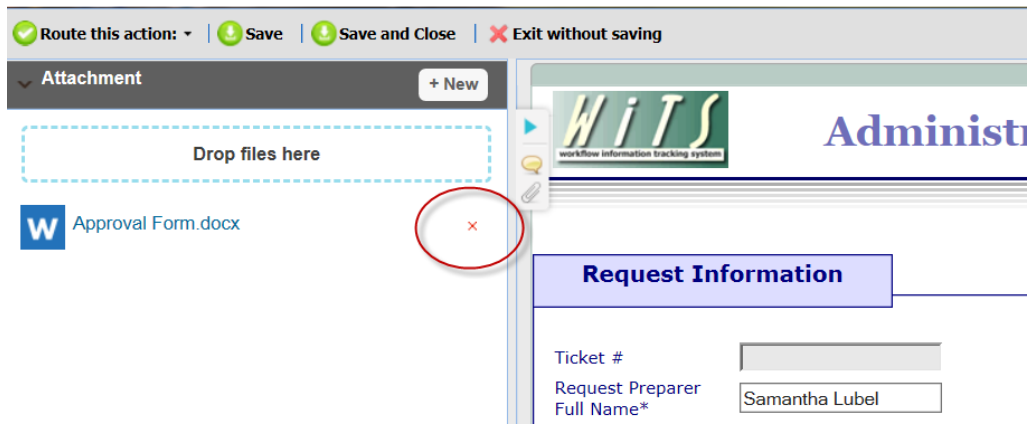
You may drag and drop files to attach, or you can use the Add New button to browse and locate the document you would like to attach.

The screenshot shows the 'Attachment' panel in the WiTS system. At the top, there is a navigation bar with options: 'Route this action: [dropdown]', 'Save', 'Save and Close', and 'Exit without saving'. The panel is titled 'Attachment' and contains a '+ New' button. Below the button is a dashed box with the text 'Drop files here'. Below the dashed box is the text 'There are no attachments.' The panel also includes the 'WiTS workflow information tracking system' logo and the 'Administrative Request' title. The 'Request Information' section is visible, showing 'Ticket #' (empty) and 'Request Preparer Full Name\*' (Samantha Lubel).

Click 'Upload' in the Attach File dialog box:

Your attached documents will remain with the action as it moves through the subsequent activities in the process and are retrievable even after the action is completed and archived.

To delete an attachment, click the X next to the document that you wish to delete from this action.



A pop-up message will appear asking you to confirm that you want to delete the attachment. *Click 'Ok.'*

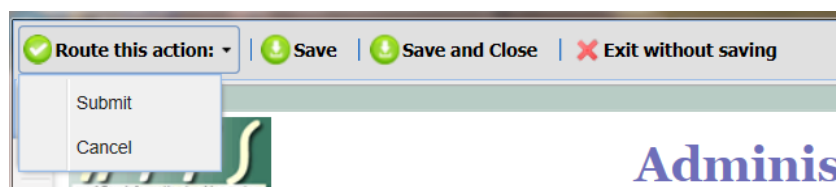
Your document will be deleted from the action.



**WITS Tip:** Be sure to refer to the ASB SOP for guidance on what documents may be necessary to attach for specific requests. A link to this SOP can be found in the help button next to the Description and Justification fields. Please note that any attached documents should not contain any employee's Personally Identifiable Information (PII) such as SSN, DOB, etc.

### ***Requestor – Routing Options***

After the Request Information Tab is complete, the Requestor or Request Preparer submits the request by selecting 'Submit' from the routing menu.



If the request was initiated in error, 'Cancel' can be selected from the routing menu to cancel the action.

Once the action has been submitted, the Requestor and Request Preparer will receive an email confirmation from WiTS, which includes details of the request.

Subject: Administrative Request #10676 has been submitted

Your Administrative Request #10676 has been submitted to your Division for action. The details of this request are provided below.

Request Preparer: Samantha Lubel  
Requestor: Samantha Lubel  
Request Type: Building Issues  
Nature of Request: Datawatch / Fascards (Key FOB)  
Request Description: I need a new Key FOB for Suite 6100, East Jefferson Building.  
Justification: I have lost my old FOB and have not been able to find it, so I will need a new one.

You will receive additional emails if more information is required and/or to update you on the status of your request.

Thank you.

## Admin Support Information Tab

The Gate Keeper of each Division will see the *Admin Support Information* tab once the request has been submitted. This tab is used by the Division Gate Keeper, the WSDD Training Approver and ASB to collect data related to the completion of the administrative request.

Request Information	Admin Support Information
Admin Staff Name	Lubel
Is There a Cost Associated with the Request?	<input type="checkbox"/>
Date Additional Division Approval Email Sent	
Date Additional Division Approval Received	
Internal Comments	
<b>Comments to Requestor</b>	
Email Date	
Comments to Requestor	
<b>ADAM Comments to Requestor(s)</b>	
ADAM Email Date	
ADAM Comments to Requestor(s)	
<b>Resolution</b>	
Resolution	
Resolved By	
Resolution Date	

**Admin Staff Name:** Automatically populates the name of the individual who is currently viewing/completing the form.

**Date Ticket Submitted:** Timestamp of the date/time the request was submitted.

**Is There a Cost Associated with the Request?:** Indicate if there is a cost associated with the request. This field is mandatory prior to completing the action, sending it for additional approval, and/or sending forward to ASB.

**Amount:** If there is a cost associated with the request, enter the amount in numbers and decimals only (no commas or dollar sign). This field is mandatory if you indicated that there is a cost associated with the request.

**Date Additional Division Approval Email Sent:** Automatic timestamp of the date/time the Additional Approval email was sent using the routing menu.

**Date Additional Division Approval Received:** If an additional approval email was sent, enter the date you received the response.

**Additional Division Approver Response:** If an additional approval email was sent, enter the decision.

**Internal Comments:** Enter any comments as needed. This field is optional.

### ***Comments to Requestor***

**Email Date:** Timestamp of the date the Gate Keeper and/or Training Approver sends the Info Only/Status and/or Response/Info Requested emails by using the routing menu.

**Comments to Requestor:** The Division Gate Keeper and/or the Training Approver enters a status update and/or indicates that more information is needed. Contents of this field will be included in the Info Only/Status and/or Response/Info Requested emails that can be sent using the routing menu.

### ***ASB Comments to Requestor(s)***

**ASB Email Date:** Automatic timestamp of the date ASB sends the Info Only/Status and/or Response/Info Requested emails by using the routing menu.

**ASB Comments to Requestor(s):** ASB enters a status update and/or indicates that more information is needed. Contents of this field will be included in the Info Only/Status and/or Response/Info Requested emails that can be sent using the routing menu.

### ***Resolution***

**Resolution:** Enter the resolution of the request. The contents of this field are pulled into the email that is sent upon completion of the action. This field is mandatory prior to resolving/completing the request.

**Resolved By:** Select the name of the person who resolved the request. This field is mandatory prior to resolving/completing the request.

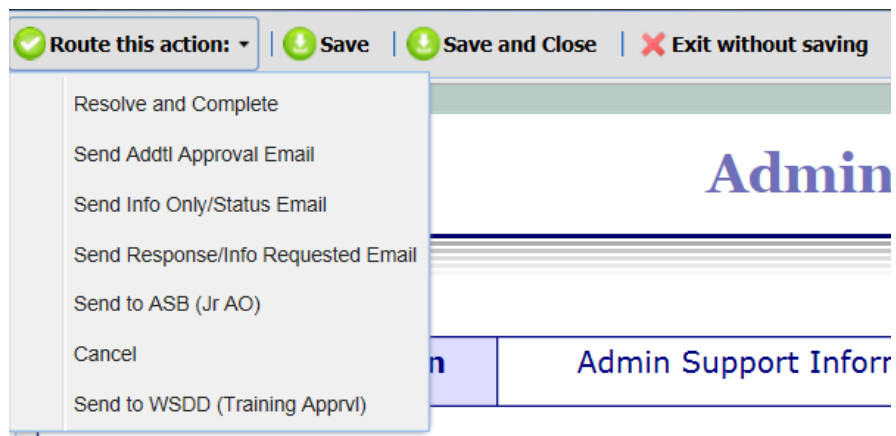


## ***Division Gate Keeper – Routing Options***

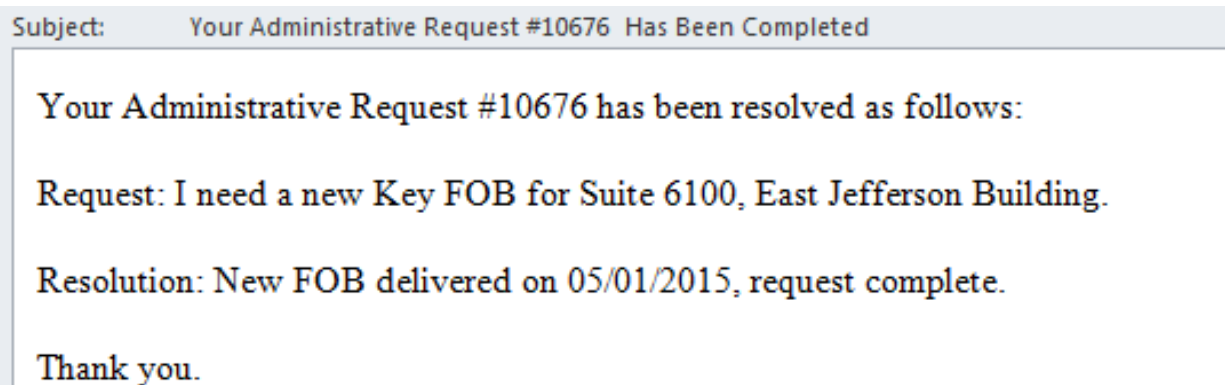
The Division Gate Keeper receives the request, reviews it, takes action on it, and/or sends for further review/action/approval. Before routing the action forward, be sure to refer to the ASB SOP for guidance on what documents may be necessary to attach for specific requests.

Please note that any attached documents should not contain any employee’s Personally Identifiable Information (PII) such as SSN, DOB, etc.

The Division Gate Keeper has the following options for working with the action.



**Resolve and Complete** – The Division Gate Keeper can resolve and complete the request. Once the action is completed, an email is sent to the Requestor and the Request Preparer indicating the resolution of the request.



**Send Additional Approval Email** – The Division Gate Keeper (for CSD only) can select this response to send an email to a Division’s designated official for approval before sending the action forward or completing it.

Subject: Review Needed - Administrative Request #10697

Administrative Request #10697, submitted by Samantha Lubel on 04/14/2015 requires your review.

Request Information

Request Preparer: Samantha Lubel  
Requestor: Samantha Lubel  
Organization: SAID - SSIMB  
Request Type: Building Issues  
Nature of Request: Datawatch / Fascards (Key FOB)  
Request Description: I need a new Key FOB for Suite 6100, East Jefferson Building.  
Cost: N/A  
Justification: I have lost my old Key FOB.

Please approve or deny this request by replying to this email.

Thank you.

**Send Info Only/Status Email** – The Division Gate Keeper can use this option from the routing menu to send an email to the Requestor advising them of the status of the request. The contents of the Comments to Requestor field will be pulled into this email.

Subject: Status of Your Administrative Request #10676

The status of your Administrative Request (submitted 04/08/2015) is as follows:

Request Description: I need a new Key FOB for Suite 6100, East Jefferson Building.

Comments: The new FOB will take 2 weeks to arrive.

Thank you.

**Send Response Requested Email** – The Division Gate Keeper can select this option from the routing menu to send an email to the Requestor asking for additional information or documentation. The contents of the Comments to Requestor field will be pulled into this email.

Subject: Response/Action Needed - Administrative Request #10676

The status of your Administrative Request (submitted 04/08/2015) is as follows:

Request Description: I need a new Key FOB for Suite 6100, East Jefferson Building.

**Please respond to the following:**

When did you lose the FOB?

Thank you.

**Send to ASB (Jr. AO)** – The Division Gate Keeper uses this option to send the request forward to the responsible Junior Admin Officer in ASB. The Requestor and Request Preparer will receive this notification. Additionally, the Jr. and Sr. AOs will be copied on this email.

**Your HR SAID Administrative Request #10803 - Forwarded to ASB**

■ Lubel, Samantha (NIH/OD) [E]

Sent: Tue 12/22/2015 4:37 PM

To: ■ Lubel, Samantha (NIH/OD) [E]

Cc: ■ Lubel, Samantha (NIH/OD) [E]; ■ Kerr, Ken (NIH/OD) [C]; ■ Verge, Terrye (NIH/OD) [E]; ■ D'Andrea, Michael (NIH/OD) [E]; ■ Belmont, Courtney (NIH/OD) [E]

Please be advised that your HR SAID Administrative Request #10803, submitted 12/22/2015 has been forwarded to ASB for additional review/processing.

Request: reservation

You will be contacted if any additional information is needed; otherwise you will be notified when the request has been completed.

Thank you.

**Send to WSDD (Training Approval)** – The Division Gate Keeper uses this option to send the case to WSDD for approval of training requests.

*Note: ALL training requests, regardless of whether a cost is associated) must be sent to WSDD for approval before being completed by the Request Preparer or moving forward to ASB.*

The WSDD Approver will receive the following email:

Subject: Review Needed - Training Request #10698

Training Request #10698, submitted by Samantha Lubel on 04/14/2015 requires your review.

Request Information:

Request Preparer: Samantha Lubel

Requestor: Samantha Lubel

Organization: SAID - SSIMB

Request: Project Management, May 05, 2015.

Training Provider: OHR Sponsored

Cost: 100.00

Justification: I need to take this training in order to improve my project management skills.

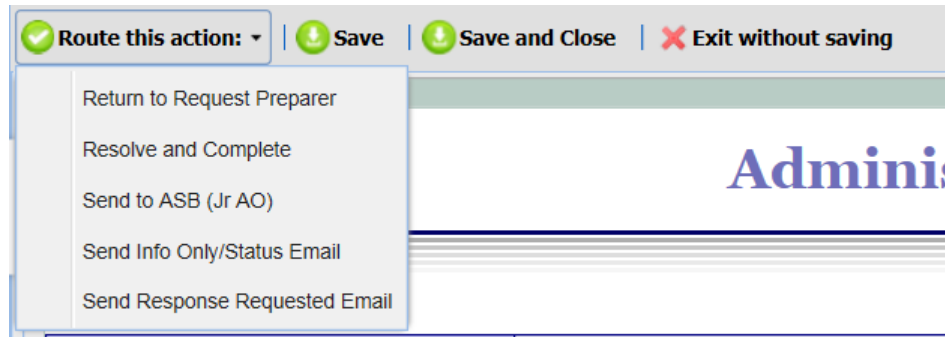
Thank you.

**Cancel** – The Division Gate Keeper can cancel a request if necessary. This option should only be

used if a request was entered in error. If a request cannot be completed for another reason, indicate the reason in the resolution field and resolve/complete the action.

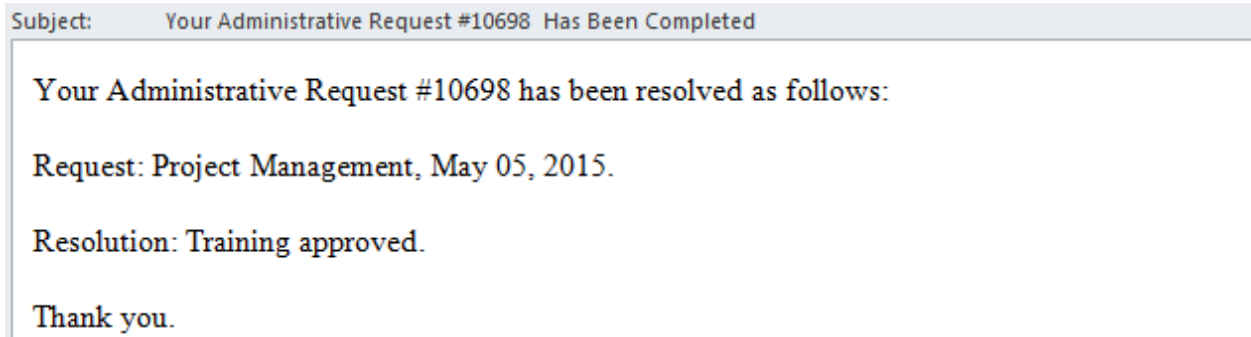
### ***Training Approver – Routing Options***

The Training Approver receives the training request, reviews it, takes action on it, and/or sends it for further review/action/approval. Below are the options the Training Approver has for working with the action.



**Return to Request Preparer** – The Training Approver can return the request to the Request Preparer if needed.

**Resolve and Complete** – The Training Approver can resolve and complete the request. Once the action is completed, an email is sent to the Requestor and the Request Preparer indicating the resolution of the request.



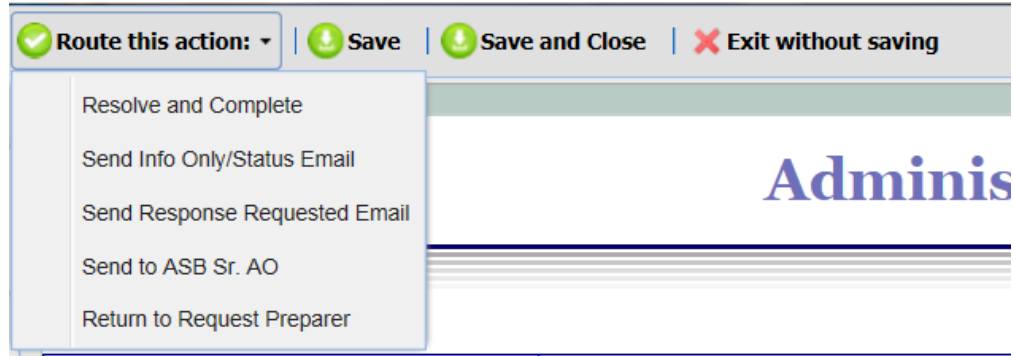
**Send to ASB (Jr AO)** – The Training Approver can send the action forward to ASB for additional processing.

**Send Info Only/Status Email** – The Training Approver can use this option from the routing menu to send an email to the Requestor/Request Preparer and Division Gate Keeper advising them of the status of the request. The contents of the Comments to Requestor field will be pulled into this email.

**Send Response Requested Email** – The Training Approver can response is used to send an email to the Requestor/Request Preparer and Division Gate Keeper asking for additional information or documentation. The contents of the Comments to Requestor field will be pulled into this email.

## ***ASB Jr. AO – Routing Options***

When the **ASB Jr. AO** receives the request, he/she reviews it and either takes action on it or sends for further review/action/approval:



**Resolve and Complete** – The ASB Jr. AO can resolve and complete the request. Once the action is completed, an email is sent to the Requestor and the Request Preparer indicating the resolution of the request.

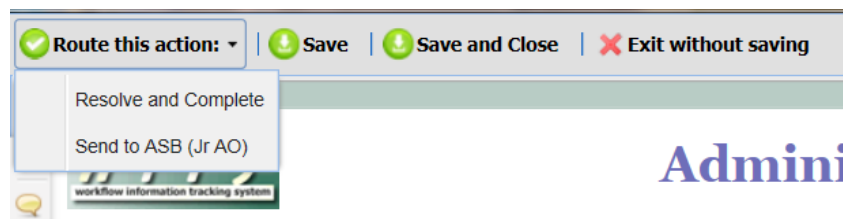
**Send Info Only/Status Email** – The ASB Jr. AO this response is used to send an email to the Requestor and the Request Preparer advising them of the status of the request

**Send Response Requested Email** – The ASB Jr. AO can select this response to send an email to the Requestor/Request Preparing and Division Gate Keeper asking for additional information or documentation

**Send to ASB (Sr. AO)** – The ASB Jr. AO uses this routing menu option to send the request forward to the responsible Senior Admin Officer in ASB.

## ***ASB Sr. AO – Routing Options***

When the **ASB Sr. AO** receives the request, he/she reviews it and either resolves it or returns it to the ASB Jr. AO:



**Resolve and Complete** – The ASB Sr. AO can select this option from the routing menu to complete the action, and sends a notice to the Requestor and Request Preparer

**Send to ASB Jr. AO** – The ASB Sr. AO can select this option from the routing menu to send the request back to the responsible Junior Admin Officer in ASB if needed.

## Administrative Workflow Bizcoves

### Division Work Area Bizcoves

#### WiTS Request Initiation

Where users are able to initiate Administrative Requests using the Administrative Request process link.

Name	Description
<input type="checkbox"/> Administrative Request	Process for OHR Division administrative staff, authorized admin requestors and ADAM staff to submit and track a variety of administrative requests (building issues, travel, supplies, training, etc.).
<input type="checkbox"/> Request for HR Systems Access (and User Profile Changes/Deletions)	WiTS Super Users, Branch Chiefs, Deputy Division Directors and Division Directors can use this workflow to request new, modified or deleted access to HRSS supported systems (Capital HR, eOPF, WiTS, HHS Careers, HR CARDS, etc.).
<input type="checkbox"/> Request for HR Systems Support	Use this workflow to submit support requests for HR systems such as HHS Careers, HR CARDS, WiTS, Capital HR (CHR), OHR Websites, etc. Initiate a separate request per system.

#### Draft Administrative Requests – ‘Division’

All of the Request Preparer’s draft actions will appear here.

WITS Request #	Date Initiated	Requestor Name	Organization	Request Type	Nature of Request	Request Description
No records to display on this page						

#### Pending Administrative Requests – ‘Division’

All Division actions that have been initiated and submitted to the Division Gatekeeper will appear here. This bizcove is the work list for the Division Gatekeeper.

WITS Request #	Date Submitted	Requestor Name	Organization	Request Type	Nature of Request	Request Description
<input type="checkbox"/> 10751	08/27/15 12:01:19 PM	Samantha Lubel	SAID - CSBAB	Reservations	Conference Room	I need the training room on 8/30 and ill also need a conference line.

#### ‘Division’ Administrative Requests – Pending with ASB

All Division actions that the Division Gatekeeper has routed to ASB will appear here. This bizcove is for viewing actions only, Division Gatekeepers should not take action on the actions in this bizcove.

WITS Request #	Date Submitted	Requestor Name	Organization	Request Type	Nature of Request	Request Description
<input type="checkbox"/> 10758	09/02/15 02:12:34 PM	Samantha Lubel	SAID - TMWSB	Equipment / Property	Laptop	new laptop is needed

#### ‘Division’ Training Requests – Submitted to WSDD

All Division training actions that the Division Gatekeeper has routed to WSDD will appear here. This bizcove

is for viewing actions only, Division Gatekeepers should not take action on the actions in this bizcove.

HR SAID Training Requests - Submitted to WSDD						
WITS Request #	Date Submitted	Requestor Name	Organization	Request Type	Training Provider	Request Description
10684	04/09/15 02:16:22 PM	Ken Kerr	SAID - TMWSB	Training	OHR Sponsored	dassadsadf

Quick Search:  View Action Detail... Monitor Selected Process... Export List to Excel...

### 'Division' Training Requests – Submitted to ASB

All Division training actions that the Training Center has routed to WSDD will appear here. This bizcove is for viewing actions only, Division Gatekeepers should not take action on the actions in this bizcove.

HR SAID Training Requests - Submitted to ASB						
WITS Request #	Date Submitted	Requestor Name	Organization	Request Type	Training Provider	Request Description
10686	04/09/15 02:43:57 PM	Samantha Lubel	SAID - TMWSB	Training	Other	training request

View Action Detail... Monitor Selected Process... Export List to Excel...

### WSDD Specific Bizcoves

#### All OHR Training Requests – Pending with WSDD

All OHR training requests that have been send to WSDD will appear here. This bizcove is only seen by the Training Approvers in WSDD.

All OHR Training Requests - Pending with WSDD									
WITS Request #	Date Sent to WSDD	Requestor Name	OHR Division	Organization	Request Type	Training Provider	Request Description	Justification	Cost (Amount)
10742	06/25/15 11:24:28 AM	Samantha Lubel	WSDD	WSDD - Training Ctr	Training	OHR Sponsored	Training class	Justification attached	N/A

Quick Search:  Open Selected Action... Monitor Selected Process... Forward to Another User... Export List to Excel...

#### All OHR Training Requests – Pending with ASB

All OHR training requests that WSDD has sent to ASB will appear here. This bizcove is only seen by the Training Approvers in WSDD.

All OHR Training Requests - Pending with ADAM									
WITS Request #	Date Sent to ADAM	Requestor Name	OHR Division	Organization	Request Type	Training Provider	Request Description	Justification	Cost (Amount)
10686	04/09/15 02:49:08 PM	Samantha Lubel	HR SAID	SAID - TMWSB	Training	Other	training request	justification	N/A
10744	06/25/15 01:40:00 PM	Samantha Lubel	WSDD	WSDD - Training Ctr	Training	OHR Sponsored	requesting training	supervisor approval is attached.	N/A

Quick Search:  View Action Detail... Monitor Selected Process... Export List to Excel...

### Other Related Bizcove

#### My Active Administrative requests (Admin Request Preparers Only)

All active administrative requests for the Request Preparer. If the Requestor is different, they are unable to see their actions here.

My Active Administrative Requests (Admin Request Preparers Only)							
WITS Request #	Request Type	Nature of Request	Request Description	Date Submitted to Division	Date Sent to WSDD (Training Approval)	Date Sent to ADAM Jr. AO	Date Sent to ADAM Sr. AO
No records to display on this page							

Quick Search:  View Action Detail... Monitor Selected Process... Export List to Excel...