SAIS DATA/REPORT REQUEST User Guide

Overview

Welcome to WorkFront!

With this new, web-based project management system, you can track your projects from start to finish. It's easy to use and will allow you to:

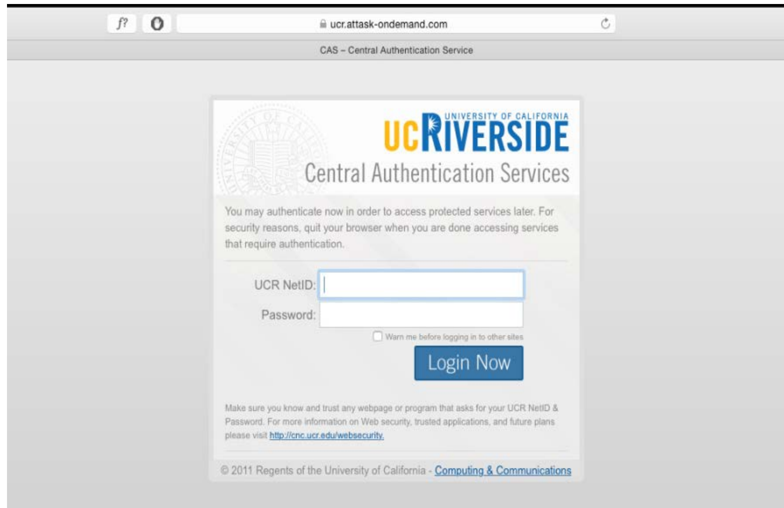
- Submit your data request
- Check the status of your data request
- Communicate about your data request
- Provide feedback and approvals in one single place
- Make updates, tag people, and comment (similar to Facebook)

SUBMITTING A DATA/REPORT REQUEST

Login to WorkFront

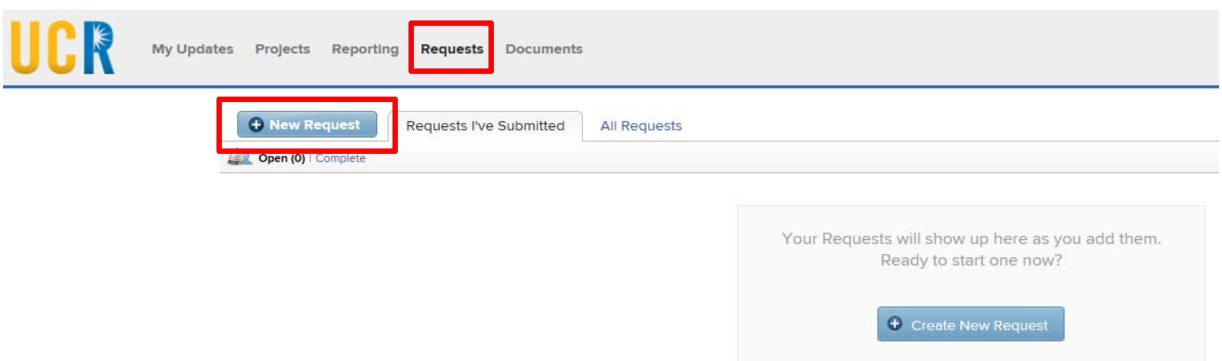
Accessing WorkFront is easy – Just login using your UCR credentials.

URL: GO.UCR.EDU/WORKFRONT

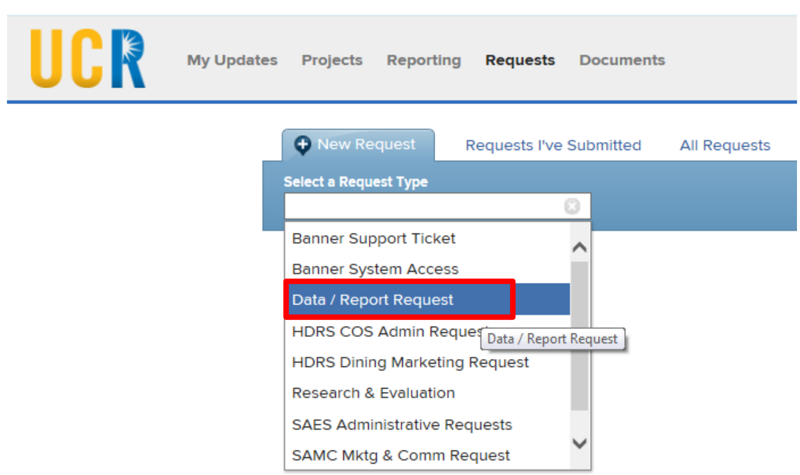


Submit a new request

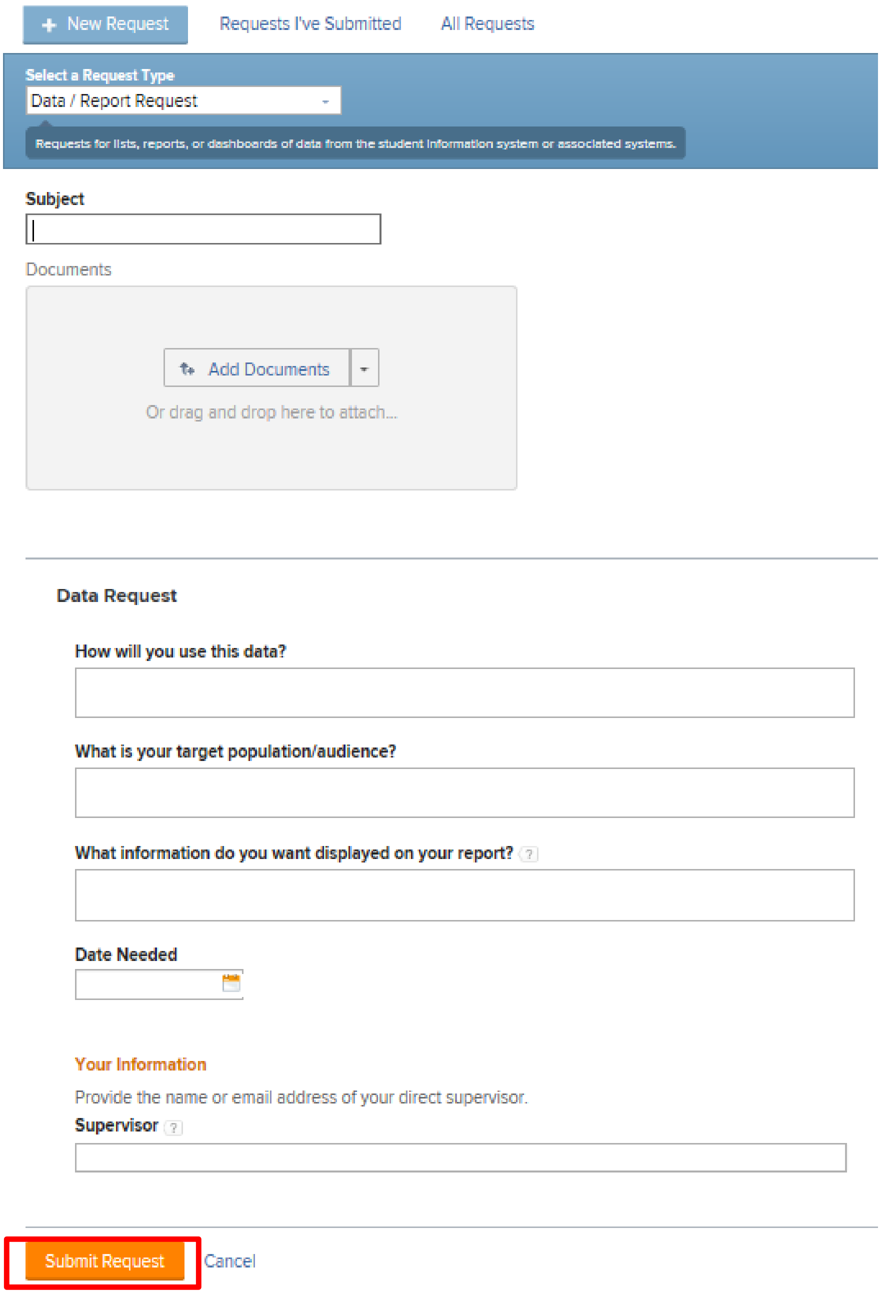
On the top gray area Navigate to the **Request** tab and then select **New Request**.



From the drop-down menu select **Data/Report Request**.



Fill out the form completely.



Subject – Short Description of your request

Documents – Available to upload supporting documents.

Data Request – Custom Section

How will you use this data? – Provide a description of how the data supplied from this request will be used. Specifically describe your need for any sensitive data fields (ethnicity, gender, citizenship, etc.) requested.

What is your target population/audience? – Describe the selection criteria for the cohort needed in the data request.

What information do you want displayed on your report? – List the data fields you need supplied with your data request.

Date Needed – Indicate the date you need the data. (Data requests take 7-10 days to process)

Supervisor - Please enter the name and email of your direct supervisor

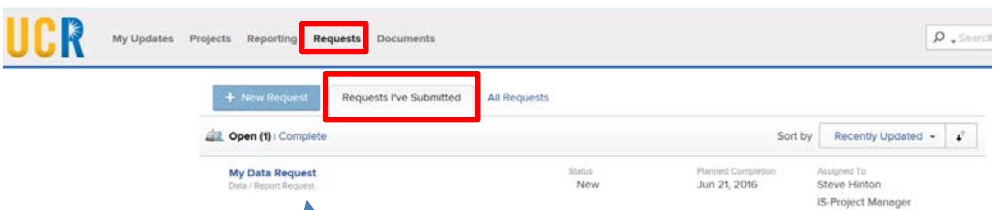
Submit your request – You will receive an email confirmation that your request has been received.

TRACKING YOUR REQUEST

View requests you've submitted

Navigate to **Requests**

This view will give you an overview the request(s) that you've submitted. Summarizing the request status, planned completion and assignment.

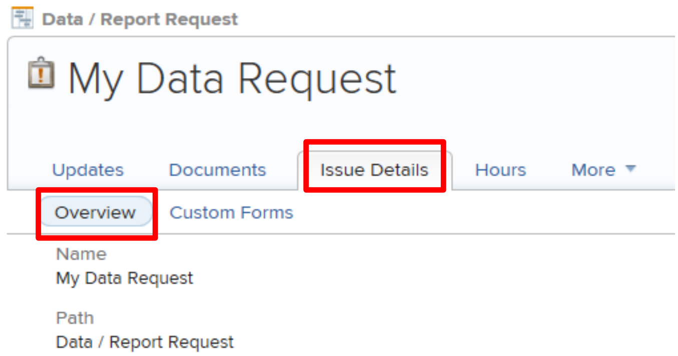


If you want to view details of a request, click on the title of the request. **My Data Request**

View the details of your request

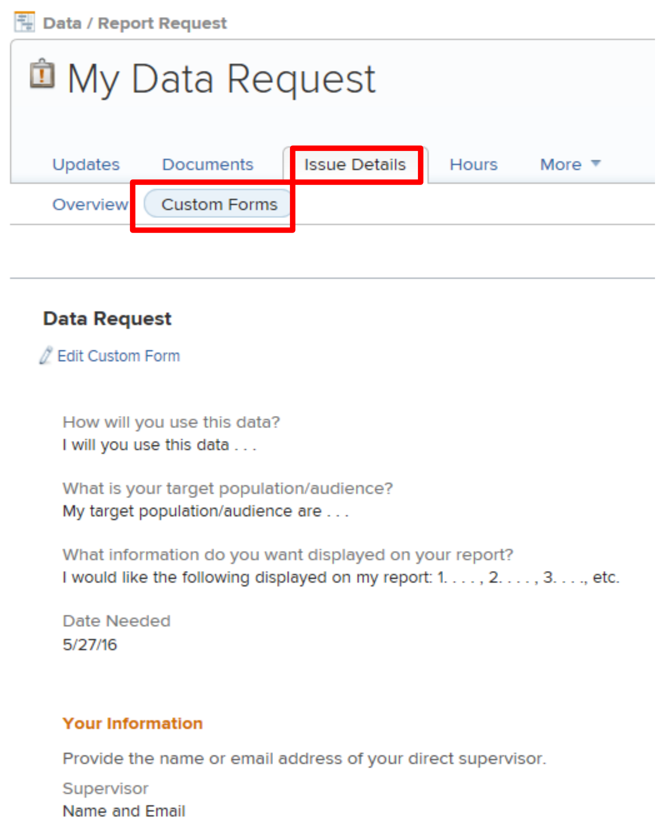
Navigate to **Issue Detail** tab.

Overview will provide you a view of the request



Navigate to **Issue Detail** tab.

Custom Form will provide you a view of the custom section of the request



COMMUNICATING ABOUT YOUR REQUEST

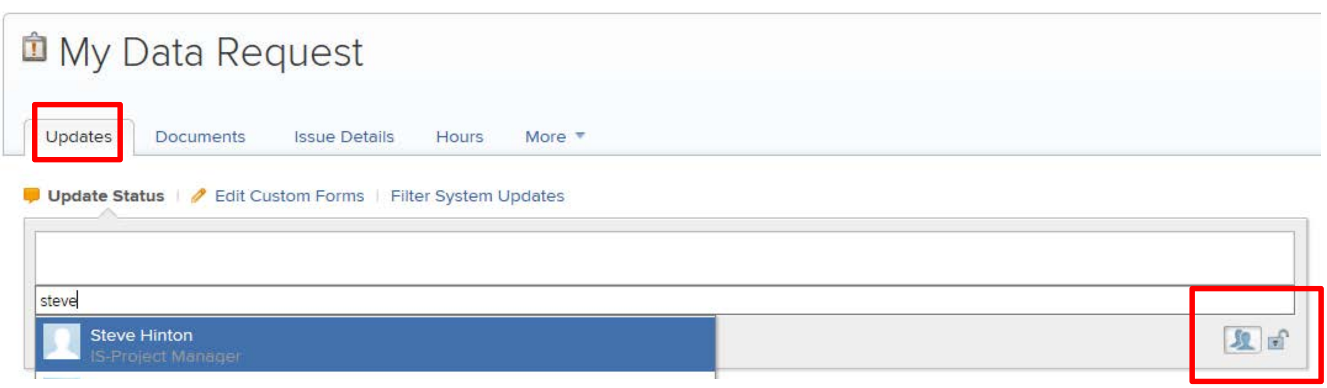
Submit an update to a Request

When you first login, locate the request and click on the title.

- Navigate to the **Updates** tab.
- Enter your message.
- Click on the **People Icon** and enter the staff member you want to notify

Similar to an email, please start your message with the name of the staff member that the message is intended for. Include those who need to be CC'd by tagging them.

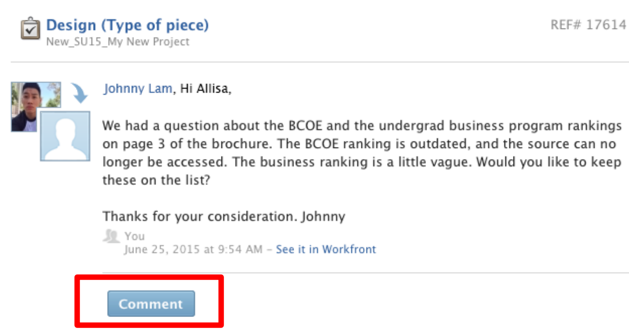
Note: If you do not tag the person, they will not get notified through email.



If a staff member's name is not showing up, this means the user has not been input into WorkFront. **Please submit WorkFront Service Request to add a user.**

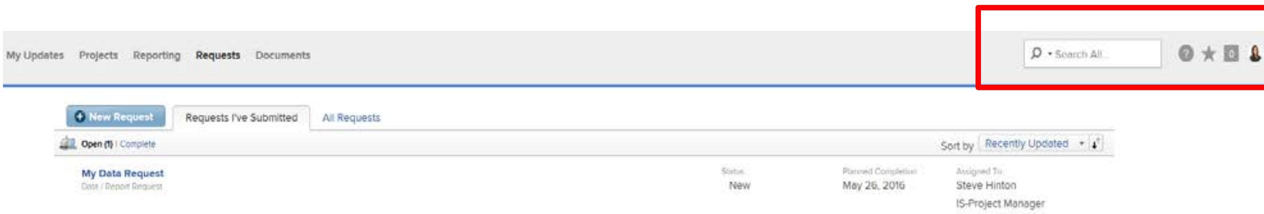
Email notifications

Reply to a Request Update – When you receive a WorkFront email notification from a service coordinator working on your request, you are able to comment back by clicking the **Comment** button. The link will take you directly to the comment section of that specific project. Remember to tag the recipient(s).

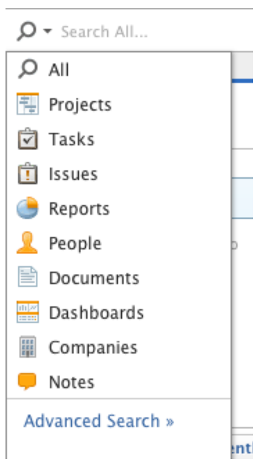


WORKFRONT DASHBOARD

Overview of Navigation Bar

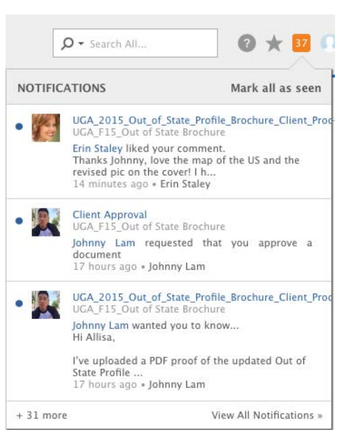


Search – WorkFront's quick search helps you find a project or document by making recommendations based on your viewing history. Press enter and WorkFront will take you into the project or document. Refine your search further by using the filter.



WorkFront Help – If you have a question about WorkFront, call Susana Roddy at 2-5694. You are also welcome to explore any topics using the search box.

Notifications – The icon will illuminate orange with a number indicating how many notifications you have. You will receive notifications that include conversations you are included in or updates to a Request.



My Settings – Modify your settings, change your avatar, and update email notifications and profile details here.