



CalPolyPomona



# PROVOST'S OFFICE PORTAL USER GUIDE

## Table of Contents

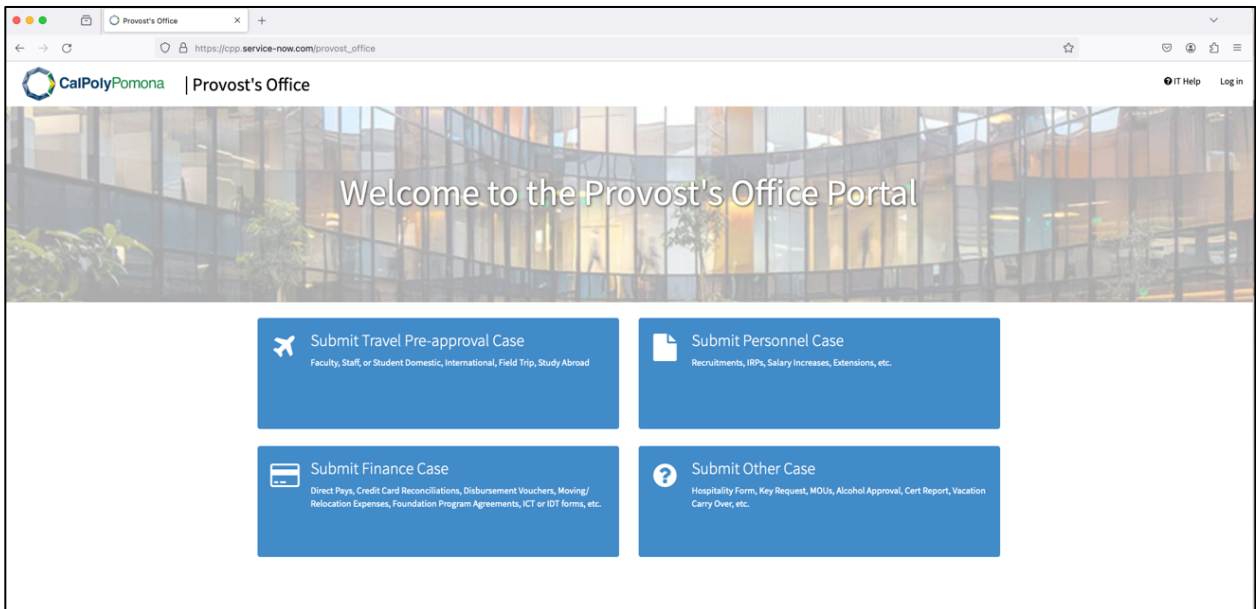
<i>Accessing the Portal home page.....</i>	<i>2</i>
<i>Submitting a Travel Pre-approval Case Ticket .....</i>	<i>2</i>
<i>Submitting a Personnel Case Ticket .....</i>	<i>7</i>
<i>Submitting a Finance Case Ticket .....</i>	<i>10</i>
<i>Submitting an Other Case Ticket.....</i>	<i>13</i>
<i>After Submitting a Service Ticket .....</i>	<i>16</i>
<i>Viewing Service Tickets in the Portal .....</i>	<i>16</i>
<i>Checking Ticket Status .....</i>	<i>18</i>
<i>Downloading Signed Documents.....</i>	<i>19</i>
<i>Frequently Asked Questions.....</i>	<i>20</i>
<i>Additional Resources .....</i>	<i>21</i>

# Provost's Office Portal User Guide

The Provost's Office Portal is the hub for submitting most requests for the provost's approval and signature, including travel pre-approvals, staff personnel actions, finance-related items, and other various requests. The portal uses a service ticket system to track and process requests and to maintain a record of actions and correspondence for each item.

## Accessing the Portal home page

1. Go to [https://cpp.service-now.com/provost\\_office](https://cpp.service-now.com/provost_office).



2. Use your CPP credentials to log in using the link at the top right corner of the screen.
3. You are now ready to submit a service ticket.

## Submitting a Travel Pre-approval Case Ticket

In the Division of Academic Affairs, travel requests must be routed through the Provost's Office for approval when they involve any of the following:

- Administrators reporting directly to the Provost and VP for Academic Affairs.
- Faculty/staff traveling with students.
- Students traveling overnight—with or without a faculty or staff member—for academically related purposes, including, but not limited to, field trips, conferences to present research findings, or to act in some other like capacity on behalf of the University.
- Faculty/staff/students traveling outside the United States.

Travel procedures exception requests must be routed through the Provost's Office for:

- Administrators reporting directly to the Provost and VP for Academic Affairs.
- Faculty/staff traveling outside the United States.

The Provost has delegated the authority to approve exceptions for domestic travel to the college deans and the Executive Director of Academic Resources (for individuals not associated with a college).

To request pre-approval for travel or approval for a travel procedures exception:

1. Select the "Submit Travel Pre-approval Case" tile on the Provost's Office Portal home page.
  - The *Requested By* field will automatically populate with your name and CPP username.
  - Fill out all required fields (marked \*) and, if desired, any optional fields.

Home > Submit Travel Pre-approval Case

Search

### Submit Travel Pre-approval Case

Requested by  
John Rodriguez (Johnr3)

Requester for ⓘ  
Please enter if you are filling this form out on behalf of a different user. ✖  
Note: This user will also receive a copy of this request.

Consultation Purpose  
-- None --

\* Travel Start Date  
YYYY-MM-DD

\* Short Description  
Please indicate the traveler's name, destination, special circumstances, and any other information. Attach supporting documents as needed.

NOTE: After you submit the form, you will receive a confirmation email with the ticket number. For an urgent request that is **less than one week**, after submitting the request, send an email message to [provosts\\_docs@cpp.edu](mailto:provosts_docs@cpp.edu) stating the **ticket number**, contact information, and urgency circumstances.

Priority  
Normal

Add attachments

Submit

Required information  
Consultation Purpose Travel Start Date Short Description  
Please indicate the traveler's name, destination, special circumstanc...

2. **Requester For (optional):** When submitting the request on behalf of someone else, you may include them in the *Requester For* field. By doing so, that person will be copied on all

correspondence related to the service ticket and will be able to access the ticket directly in the portal to monitor its status, add comments, and attach or download documents as needed.

As you begin typing in the *Requester For* field, it will populate with one or more names from the CPP directory. When the correct name appears, you may select it to complete the field.

3. **Consultation Purpose:** From the drop-down menu, select the type of request you are submitting, either for travel pre-approval (domestic, international, student) or for a [travel procedures exception](#).

4. **Travel Start Date:** Enter the start date for the proposed travel or, for a travel procedures exception request, the actual travel start date. This will aid the Provost’s Office in determining the time-sensitivity of the request. To the extent possible, all travel pre-approval requests should be submitted at least 30 days in advance of the anticipated travel start date.

The table below summarizes the minimum submittal timelines and approval levels required for international travel for those in the Division of Academic Affairs, based on the level of risk as determined by the U.S. State Department and the CSU Risk Management Authority (CSURMA).

	U.S. State Dept. Travel Advisory Level 1 or 2	U.S. State Dept. Travel Advisory Level 3 or 4 and/or CSURMA High Hazardous List	CSURMA War Risk Country List
Number of Days to Submit Request Prior to Departure	30 days	40 days	40+ days
Approval(s) Required	Provost	Provost	Provost, President, and Chancellor’s Office

Please submit requests as far as possible in advance of travel, to allow sufficient time for pre-approval, the Concur approval process, and, if required, the purchase of foreign travel insurance. *Note:* For faculty/staff travel, a Concur Travel Request must be submitted and approved prior to booking travel arrangements and departure.

5. **Short Description:** Enter a short description of the request. Please avoid generic descriptions, such as “Travel Request.” Instead, include meaningful information that will help to distinguish each request and make it easier to search for, such as, “Prof. Einstein April travel to Brazil,” or “PLS 9999 class field trip to Sacramento,” etc.

In the next field, you may include additional information, such as the traveler’s name, destination, special circumstances, etc. This need not be exhaustive but should provide key details to help the Provost’s Office understand the nature of the request at a glance.

6. **Priority:** The default setting for this field is Normal, though it may be set to a higher or lower level, depending on the circumstances. Do not change the setting to Urgent unless warranted. The Provost’s Office will adjust the priority level for any tickets marked Urgent that are not highly time sensitive.

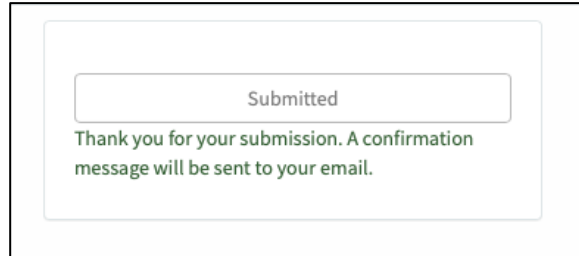
To expedite review for requests with a travel start date that is less than one week away: After submitting the ticket, send an email message to [provosts\\_docs@cpp.edu](mailto:provosts_docs@cpp.edu) with the ticket number, contact information, and urgency circumstances, e.g., “Dr. Einstein received a last-minute invitation to replace a keynote speaker at conference in Vancouver that starts in 5 days.”

7. **Add attachments:** Select the *Add Attachments* link to upload documents for the provost’s review and signature.

Helpful tips for adding attachments to Travel Case tickets:

- Include all required documents, i.e., memo and supporting materials, as applicable.
  - Agenda/itinerary, invitation, or notice of accepted paper (required).
  - For international travel: Include [U.S. State Dept. Travel Advisory](#) and [CSURMA High Hazardous and War Risk Country](#) information.
  - For student travel: Include [Academic Field Trip Participant List](#) and signed [Release of Liability forms](#) (one per student). Please place the Release of Liability forms in the same order as the names appear on the Participant List.
- Combine all documents into a single PDF file. Use file compression or split into multiple files when the combined document is larger than 15MB.
- Make sure the document can be signed, either by adding a fillable signature field where the provost should sign, or by setting the document’s security properties to allow the addition of an electronic signature.

- Submit the ticket:** When you have completed all required fields and added the attachment(s), click the *Submit* button to submit the ticket. The system will notify you that the ticket has been submitted successfully, and you will receive a confirmation message via email. If you entered a name in the *Requester For* field, that person also will receive the confirmation message.





## Submitting a Personnel Case Ticket

Requests for temporary or permanent personnel actions for staff and MPPs can be submitted via the Provost's Office Portal.

*Note:* Personnel action requests for faculty members should be sent directly to the Faculty Affairs office (<https://www.cpp.edu/faculty-affairs/>) and are not to be submitted using the Provost's Office Portal.

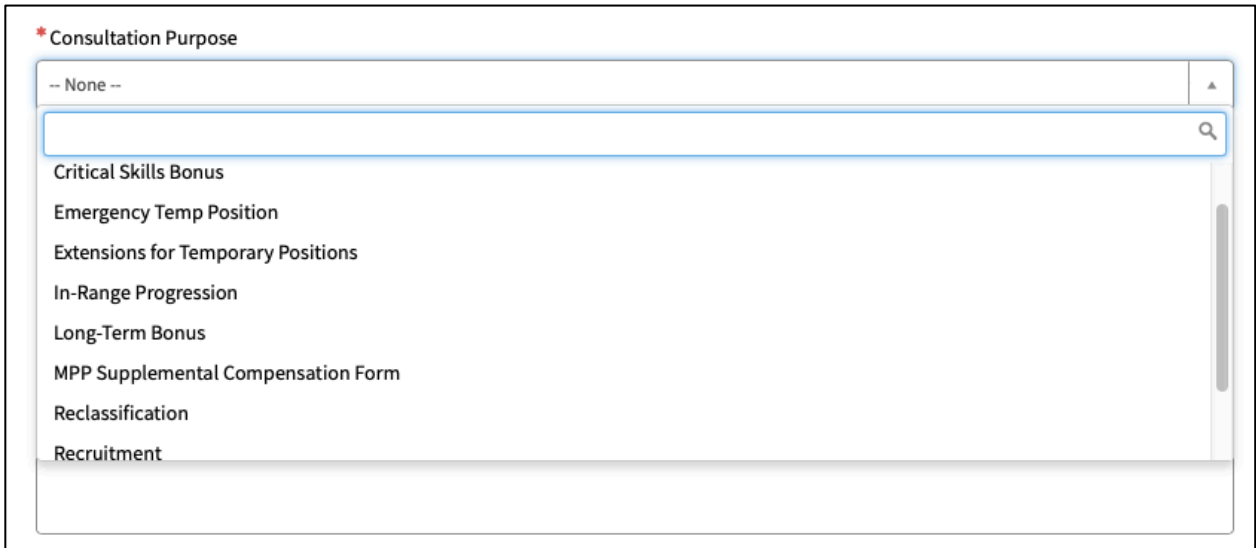
1. Select the "Submit Personnel Case" tile on the Provost's Office Portal home page.
  - The *Requested By* field will automatically populate with your name and CPP username.
  - Fill out all required fields (marked \*) and, if desired, any optional fields.

The screenshot shows the 'Create Personnel Case' form. At the top left, there is a breadcrumb 'Home > Create Personnel Case' and a search bar. The main form area is titled 'Create Personnel Case'. It contains several fields: 'Requested by' (populated with 'John Rodriguez (JohnR3)'), '\* Consultation Purpose' (dropdown menu with '-- None --'), 'Due Date' (calendar icon, placeholder 'YYYY-MM-DD'), '\* Short Description' (text input), and a note: '\* Please indicate the name of individual for whom you are submitting the request. Attach supporting documents as needed.' Below this is another text input field. A 'NOTE' section states: 'After you submit the form, you will receive a confirmation email with the ticket number. For an urgent request that is less than one week, after submitting the request, send an email message to provosts\_docs@cpp.edu stating the ticket number, contact information, and urgency circumstances.' There is also a 'Priority' dropdown menu set to 'Normal'. At the bottom right, there is an 'Add attachments' button with a paperclip icon. On the right side of the form, there is a 'Submit' button and a 'Required information' section with two tabs: 'Consultation Purpose' and 'Short Description'. Below the tabs is a red banner with the text: 'Please indicate the name of individual for whom you are submitting ...'.

**Where is the *Requester For* field?** There is no *Requester For* field for personnel requests. This is to prevent the subject of the personnel action—e.g., stipend/bonus, IRP, reclassification, etc.—from receiving notifications about the request while the matter is under consideration. Once a decision has been reached, EODA/HR will notify the employee of the outcome of the request.



2. **Consultation Purpose:** From the drop-down menu, select the type of personnel action request you are submitting.



\* Consultation Purpose

-- None --

Critical Skills Bonus

Emergency Temp Position

Extensions for Temporary Positions

In-Range Progression

Long-Term Bonus

MPP Supplemental Compensation Form

Reclassification

Recruitment

*(not all options from the menu are displayed in the image above)*

3. **Due Date (optional):** For personnel actions subject to prescribed timelines, e.g., due to union collective bargaining agreements, or when other deadlines apply, enter the date a decision is needed for submission to EODA/HR. If there is no required due date, leave the field blank.
4. **Short Description:** Enter a short description of the request. Avoid generic descriptions, such as “IRP Request.” Instead, include meaningful information that will help to distinguish each request and make it easier to search for, such as, “IRP, Library, Jean Valjean, Pos24601” or “Recruitment ASC II Environmental Engineering Dept,” etc. Please include the last four digits of the position number in this format: PosNNNN (e.g., Pos0073 or Pos9999). For new positions without an existing position number, use PostBD.

In the next field, you may include additional information, such as the name of the individual for whom the ticket is being submitted, and any other pertinent details.

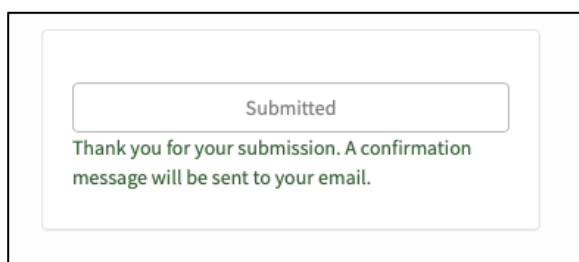
5. **Priority:** The default setting for this field is Normal, though it may be set to a higher or lower level, depending on the circumstances. Do not change the setting to Urgent unless warranted. The Provost’s Office will adjust the priority level for any tickets marked Urgent that are not highly time sensitive.

To expedite review for requests with a deadline that is less than one week away: After submitting the ticket, send an email message to [provosts\\_docs@cpp.edu](mailto:provosts_docs@cpp.edu) with the ticket number, contact information, and urgency circumstances, e.g., “Salary increase requested ASAP for retention purposes. Employee has received an offer from another employer.”

6. **Add Attachments:** Select the *Add Attachments* link to upload your document(s) for the provost's review and signature.

Helpful tips for adding attachments to Personnel Case tickets:

- Include all required documents, i.e., memo and/or HR form, plus supporting materials, as warranted.
    - Documentation requirements vary, based on the personnel action being requested. For documentation and submission requirements, see <https://www.cpp.edu/eoda-hr/departments/companclass/index.shtml>.
  - Add a signed Personnel Action Checklist for the following requests:
    - [Recruitments](#)- New Positions or Replacements
    - [Permanent Changes](#)- Reclassification, In-Range Progression, Timebase Change
    - [Temporary Changes](#)- Stipend (Units 2, 5, 7, 9), Critical Skills Bonus (Unit 4), Timebase Change, Other Action
  - Combine all documents into a single PDF file. Use file compression or split into multiple files when the combined document is larger than 15MB.
  - Make sure the document can be signed, either by adding a fillable signature field where the provost should sign, or by setting the document's security properties to allow the addition of an electronic signature.
7. **Submit the ticket:** When you have completed all required fields and added the attachment(s), click the *Submit* button to submit the ticket. The system will notify you that the ticket has been submitted successfully, and you will receive a confirmation message via email. If you entered a name in the *Requester For* field, that person also will receive the confirmation message.



## Submitting a Finance Case Ticket

1. Select the “Submit Finance Case” tile on the Provost’s Office Portal home page.
  - The *Requested By* field will automatically populate with your name and CPP username.
  - Fill out all required fields (marked *\**) and, if desired, any optional fields.

The screenshot shows the 'Create Finance Case' form. At the top left, there is a breadcrumb 'Home > Create Finance Case' and a search bar. The main heading is 'Create Finance Case'. Below this, the 'Requested by' field is populated with 'John Rodriguez (johnr3)'. The 'Requester for' field is empty, with a note: 'Please enter if you are filling this form out on behalf of a different user. Note: This user will also receive a copy of this request.' Below this are three required fields: '\* Consultation Purpose' (set to '-- None --'), '\* Short Description' (empty), and a larger text area with the instruction: '\* Please provide detailed information related to this request including the due date if any. Attach supporting documents as needed.' A note below states: 'NOTE: After you submit the form, you will receive a confirmation email with the ticket number. For an urgent request that is less than one week, after submitting the request, send an email message to provosts\_docs@cpp.edu stating the ticket number, contact information, and urgency circumstances.' The 'Priority' field is set to 'Normal'. At the bottom right, there is an 'Add attachments' button with a paperclip icon. On the right side of the form, there is a 'Submit' button and a 'Required information' section with two tabs: 'Consultation Purpose' and 'Short Description'. Below the tabs is a red banner that says 'Please provide detailed information related to this request including...'.

2. **Requester For (optional):** When submitting the request on behalf of someone else, you may include them in the *Requester For* field. By doing so, that person will be copied on all correspondence related to the service ticket and will be able to access the ticket directly in the portal to monitor its status, add comments, and attach or download documents as needed.

As you begin typing in the *Requester For* field, it will populate with one or more names from the CPP directory. When the correct name appears, you may select it to complete the field.

3. **Consultation Purpose:** From the drop-down menu, select the type of finance request you are submitting.

\* Consultation Purpose

-- None --

Direct Pays for Cell Phone Reimbursement (for direct reports)

State Corporate Travel Card Reconciliation (for direct reports)

State Purchasing Card Reconciliation (for direct reports)

Philanthropic Travel Card Reconciliation (for direct reports)

Foundation Purchasing Card (for direct reports)

Disbursement Vouchers (for direct reports)

Moving and Relocation Expenses

*(not all options from the menu are displayed in the image above)*

4. **Short Description:** Enter a short description of the request. Please avoid generic descriptions, such as “Cell Phone Reimbursement.” Instead, include meaningful information that will help to distinguish each request and make it easier to search for, such as, “Cell Phone Reimbursement for Dean Smith, March 2024” or “Foundation Program Agreement, Project 8675309,” etc.

In the next field, you may include more detailed information related to the request, including a due date, if applicable.

5. **Priority:** The default setting for this field is Normal, though it may be set to a higher or lower level, depending on the circumstances. Do not change the setting to Urgent unless warranted. The Provost’s Office will adjust the priority level for any tickets marked Urgent that are not highly time sensitive.

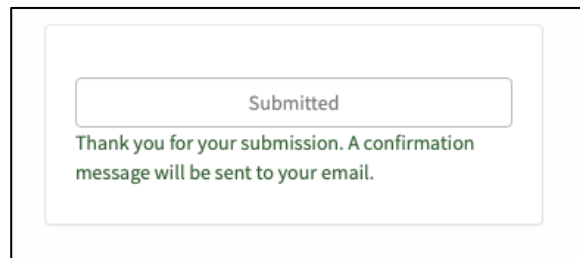
To expedite review for requests with a deadline that is less than one week away: After submitting the ticket, send an email message to [provosts\\_docs@cpp.edu](mailto:provosts_docs@cpp.edu) with the ticket number, contact information, and urgency circumstances, e.g., “Travel card reconciliation is due in 2 days.”

6. **Add Attachments:** Select the *Add Attachments* link to upload your document(s) for the provost’s review and signature.

Helpful tips for adding attachments to Finance Case tickets:

- Include all required documents, i.e., form(s) and supporting materials, as applicable.
  - For reimbursements: Direct Pay or Disbursement Voucher form and receipts or billing statements.
  - For travel card reconciliations: Travel Card Summary, US Bank Cardholder Activity statement, receipts, and approved Concur travel requests.

- For requests submitted more than 60 days from the receipt/billing date: Provide a memo signed by the appropriate manager, with a short explanation as to why the request is being submitted late.
  - Combine all documents into a single PDF file. Use file compression or split into multiple files when the combined document is larger than 15MB.
  - Make sure the document can be signed, either by adding a fillable signature field where the provost should sign, or by setting the document's security properties to allow the addition of an electronic signature.
7. **Submit the ticket:** When you have completed all required fields and added the attachment(s), click the *Submit* button to submit the ticket. The system will notify you that the ticket has been submitted successfully, and you will receive a confirmation message via email. If you entered a name in the *Requester For* field, that person also will receive the confirmation message.



## Submitting an Other Case Ticket

1. Select the “Submit Other Case” tile on the Provost’s Office Portal home page.
  - The *Requested By* field will automatically populate with your name and CPP username.
  - Fill out all required fields (marked **\***) and, if desired, any optional fields.

The screenshot shows the 'Create Other Case' form. At the top, there is a breadcrumb 'Home > Create Other Case' and a search bar. The main heading is 'Create Other Case'. Below this, there is a 'Requested by' field with a dropdown menu showing 'John Rodriguez (johnr3)'. A 'Requester for' field is present with a red question mark icon and a note: 'Please enter if you are filling this form out on behalf of a different user. Note: This user will also receive a copy of this request.' Below this is a dropdown menu. The form has three required fields marked with a red asterisk: 'Consultation Purpose' (dropdown menu with '-- None --'), 'Short Description' (text input), and 'Detailed Description' (text input). A 'Priority' dropdown menu is set to 'Normal'. At the bottom right, there is an 'Add attachments' button with a paperclip icon. On the right side of the form, there is a 'Submit' button and a 'Required information' section with three tabs: 'Consultation Purpose', 'Short Description', and 'Detailed Description'.

2. **Requester For (optional):** When submitting the request on behalf of someone else, you may include them in the *Requester For* field. By doing so, that person will be copied on all correspondence related to the service ticket and will be able to access the ticket directly in the portal to monitor its status, add comments, and attach or download documents as needed.

As you begin typing in the *Requested For* field, it will populate with one or more names from the CPP directory. When the correct name appears, you may click it to complete the field.

3. **Consultation Purpose:** From the drop-down menu, select the type of request you are submitting. If none of the named consultation purposes apply, or if you have a Travel, Personnel, or Finance request that is not listed under those case types, please select “Other.”

\* Consultation Purpose

-- None --

Alcohol Approval Form

Hospitality Form

Key Request (for direct reports)

MOUs

Vacation Carry Over

Other

4. **Short Description:** Enter a short description of the request. Please avoid generic descriptions, such as “Alcohol Approval.” Instead, include meaningful information that will help to distinguish each request and make it easier to identify, for example, “Alcohol Request- HCOA Alumni Event April 2024” or “MOU University of Oxford, UK,” etc.

In the next field, you may include more detailed information related to the request.

5. **Priority:** The default setting for this field is Normal, though it may be set to a higher or lower level, depending on the circumstances. Do not change the setting to Urgent unless warranted. The Provost’s Office will adjust the priority level for any tickets marked Urgent that are not highly time sensitive.

To expedite review for requests with a deadline that is less than one week away: After submitting the ticket, send an email message to [provosts\\_docs@cpp.edu](mailto:provosts_docs@cpp.edu) with the ticket number, contact information, and urgency circumstances, e.g., “My building and office keys were stolen and need to be replaced immediately.”

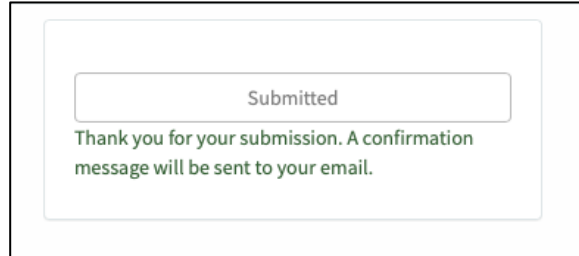
6. **Add Attachments:** Select the *Add Attachments* link to upload your document(s) for the provost’s review and signature.

Helpful tips for adding attachments to Other Case tickets:

- Include all required documents, i.e., form(s) and supporting materials, as applicable.
- Combine all documents into a single PDF file. Use file compression or split into multiple files when the combined document is larger than 15MB.
- Make sure the document can be signed, either by adding a fillable signature field where the provost should sign, or by setting the document’s security properties to allow the addition of an electronic signature.

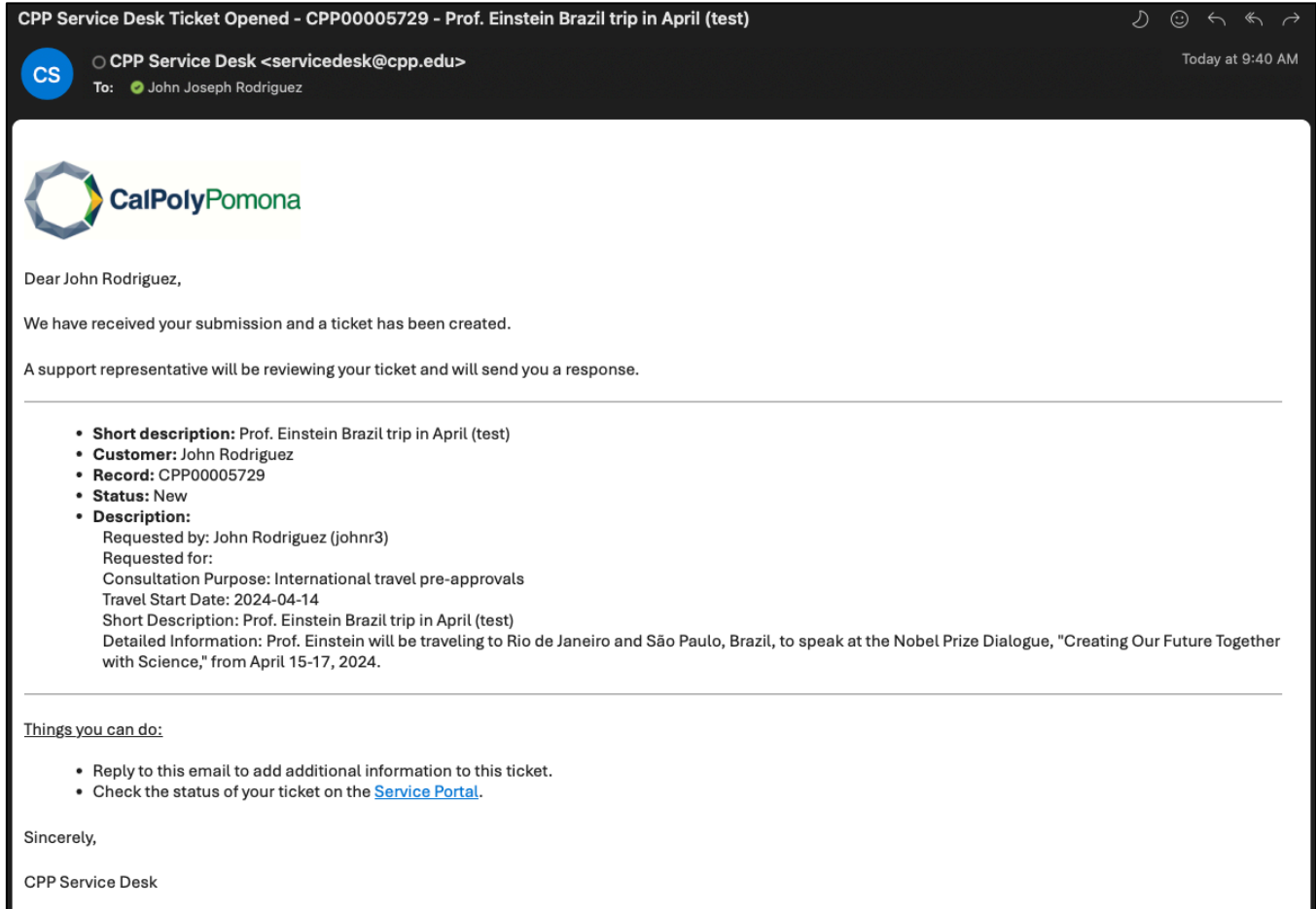


- 7. Submit the ticket:** When you have completed all required fields and added the attachment(s), click the *Submit* button to submit the ticket. The system will notify you that the ticket has been submitted successfully, and you will receive a confirmation message via email. If you entered a name in the *Requester For* field, that person also will receive the confirmation message.



## After Submitting a Service Ticket


You will receive an email confirmation that a ticket has been created. If you entered a name in the *Requester For* field, that person will be copied on all activity and correspondence related to the ticket.



The screenshot shows an email from CPP Service Desk with the subject "CPP Service Desk Ticket Opened - CPP00005729 - Prof. Einstein Brazil trip in April (test)". The email is addressed to John Joseph Rodriguez. The body of the email includes the CalPoly Pomona logo, a greeting, and a confirmation that a ticket has been created. It provides a list of ticket details: Short description, Customer, Record, Status, and Description. The description includes the requester's name, the purpose of the consultation, the travel start date, and a short description of the trip. It also provides a link to the Service Portal and instructions on how to reply to the email or check the ticket status.

CPP Service Desk Ticket Opened - CPP00005729 - Prof. Einstein Brazil trip in April (test)

CS ○ CPP Service Desk <servicedesk@cpp.edu> Today at 9:40 AM  
To: ● John Joseph Rodriguez

 CalPolyPomona

Dear John Rodriguez,

We have received your submission and a ticket has been created.

A support representative will be reviewing your ticket and will send you a response.

---

- **Short description:** Prof. Einstein Brazil trip in April (test)
- **Customer:** John Rodriguez
- **Record:** CPP00005729
- **Status:** New
- **Description:**
  - Requested by: John Rodriguez (johnr3)
  - Requested for:
  - Consultation Purpose: International travel pre-approvals
  - Travel Start Date: 2024-04-14
  - Short Description: Prof. Einstein Brazil trip in April (test)
  - Detailed Information: Prof. Einstein will be traveling to Rio de Janeiro and São Paulo, Brazil, to speak at the Nobel Prize Dialogue, "Creating Our Future Together with Science," from April 15-17, 2024.

---

Things you can do:

- Reply to this email to add additional information to this ticket.
- Check the status of your ticket on the [Service Portal](#).

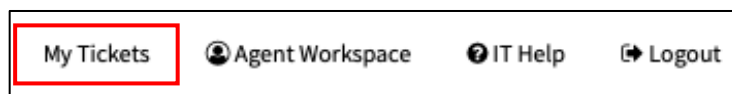
Sincerely,  
CPP Service Desk

If needed, you can reply to the email to add a question or comment. You may also click the Service Portal link at the bottom of the message to access the ticket.

## Viewing Service Tickets in the Portal

There are a couple of ways to view service tickets and check for status updates.

1. By selecting the Service Portal link at the bottom of a system email notification (see above).  
—OR—
2. By using the *My Tickets* link on the top right corner of the Provost's Office Portal page (CPP login required).



The *My Tickets* link will take you to the Requests page, where you can view any tickets you have requested or that have been requested on your behalf.

My Tickets		
	View <input type="text" value="Open"/>	<input type="text" value="Search open requests"/> <input type="button" value="Q"/>
<a href="#">Prof. Einstein Brazil trip in April (test)</a> CPP00005729	Open	🕒 25m ago
<a href="#">Cell phone reimbursements for [REDACTED]</a> CPP00005414	Resolved	🕒 about an hour ago

On the Requests page, select a ticket from the list to display its activity.

Number  
CPP00005729

Created  
about an hour ago

Updated  
about an hour ago

State  
**Open**

**Prof. Einstein Brazil trip in April (test)** Actions -

Requested by: John Rodriguez (johnr3) Requested for: Consultation Purpose: International travel pre-approvals Travel Start Date: 2024-04-14 Short Description: Prof. Einstein Brazil trip in April (test) Detailed Information: Prof. Einstein will be traveling to Rio de Janeiro and São Paulo, Brazil, to speak at the Nobel Prize Dialogue, "Creating Our Future Together with Science," from April 15-17, 2024.

Show less ^

Service Organization  
Provost's Office

Activity **Attachments** Variables

Type your message here...

**John Rodriguez** 🕒 about an hour ago · Additional comments  
Sorry for forgetting the attachment. Here it is.

**John Rodriguez** 🕒 about an hour ago  
[Nobel Prize Dialogue - NobelPrize.org.pdf](#)  
2.3 MB

**John Rodriguez** 🕒 about an hour ago · Additional comments  
Please include an attachment with trip information for the provost's review.

**John Rodriguez** 🕒 about an hour ago  
CPP00005729 Created

Start

On the ticket page, you can check its status (△), view, add or delete attachments (○), post questions or comments (□), and see all activity and correspondence related to the ticket.

## Checking Ticket Status

The status (“State”) of a user’s submitted tickets is displayed both on the Requests page and on the individual ticket, as above. Here are the most common State types and their explanations:

- **New:** The ticket has not been opened or assigned to a member of the Provost’s Office team.
- **Open:** The ticket has been assigned and is being routed through the review process.
- **Awaiting Info:** The requester has been asked to provide additional information/documentation. After the requested information is provided, a team member will change the status to Open.
- **On Hold:** The ticket is still active, but the Provost’s Office team needs to gather additional information or to consult with other parties before an approval decision can be made.
- **Resolved:** The request is complete, and the requester has been notified via email, as below. When a request is approved, the signed documents are attached to the service ticket, not the email. The requester may accept the proposed solution (☐) or request additional help (○).
- **Closed:** The ticket cannot be re-opened or accept new activity. The system closes a ticket when the requester accepts the solution. If the requester takes no action within 10 days of the ticket being resolved, the system automatically closes the ticket.

The screenshot shows an email from the CPP Service Desk. The subject is "CPP Service Desk Ticket Solution Proposed - CPP00005729 - Prof. Einstein Brazil trip in April (test)". The recipient is John Joseph Rodriguez. The email body contains the CalPoly Pomona logo, a greeting, and a message stating that a solution has been proposed for the ticket. It includes a list of comments from John Rodriguez dated 2024-02-27, a short description of the ticket, and customer information. At the bottom, there are two buttons: "Accept Solution" (highlighted with a red box) and "I still need help" (circled in red). Below the buttons, there are instructions on what to do next and a signature from the CPP Service Desk.

CPP Service Desk Ticket Solution Proposed - CPP00005729 - Prof. Einstein Brazil trip in April (test)

CS ○ CPP Service Desk <servicedesk@cpp.edu> Today at 12:02 PM  
To: John Joseph Rodriguez

CalPoly Pomona

Dear John Rodriguez,

A solution has been proposed for your ticket CPP00005729 - Prof. Einstein Brazil trip in April (test)

Please review the proposed solution and either accept or reject as appropriate by using the buttons below. The case will automatically close in 10 days if there is no response.

• **Comments:**

2024-02-27 11:18:18 PST - John Rodriguez (Additional comments)  
The attachment is missing the memo. Please submit.

2024-02-27 09:50:28 PST - John Rodriguez (Additional comments)  
Sorry for forgetting the attachment. Here it is.

2024-02-27 09:47:41 PST - John Rodriguez (Additional comments)  
Please include an attachment with trip information for the provost's review.

• **Short description:** Prof. Einstein Brazil trip in April (test)  
• **Customer:** John Rodriguez  
• **Record:** CPP00005729  
• **Status:** Resolved  
• **Description:**  
Requested by: John Rodriguez (johnr3)  
Requested for:  
Consultation Purpose: International travel pre-approvals  
Travel Start Date: 2024-04-14  
Short Description: Prof. Einstein Brazil trip in April (test)  
Detailed Information: Prof. Einstein will be traveling to Rio de Janeiro and São Paulo, Brazil, to speak at the Nobel Prize Dialogue, "Creating Our Future Together with Science," from April 15-17, 2024.

Things you can do:

- Click on the "Accepted Solution" button to close the ticket.
- Click on the "I still need help" button to reopen the ticket.
- Reply to this email to add additional information to this ticket.
- Check the status of your ticket on the [Service Portal](#).

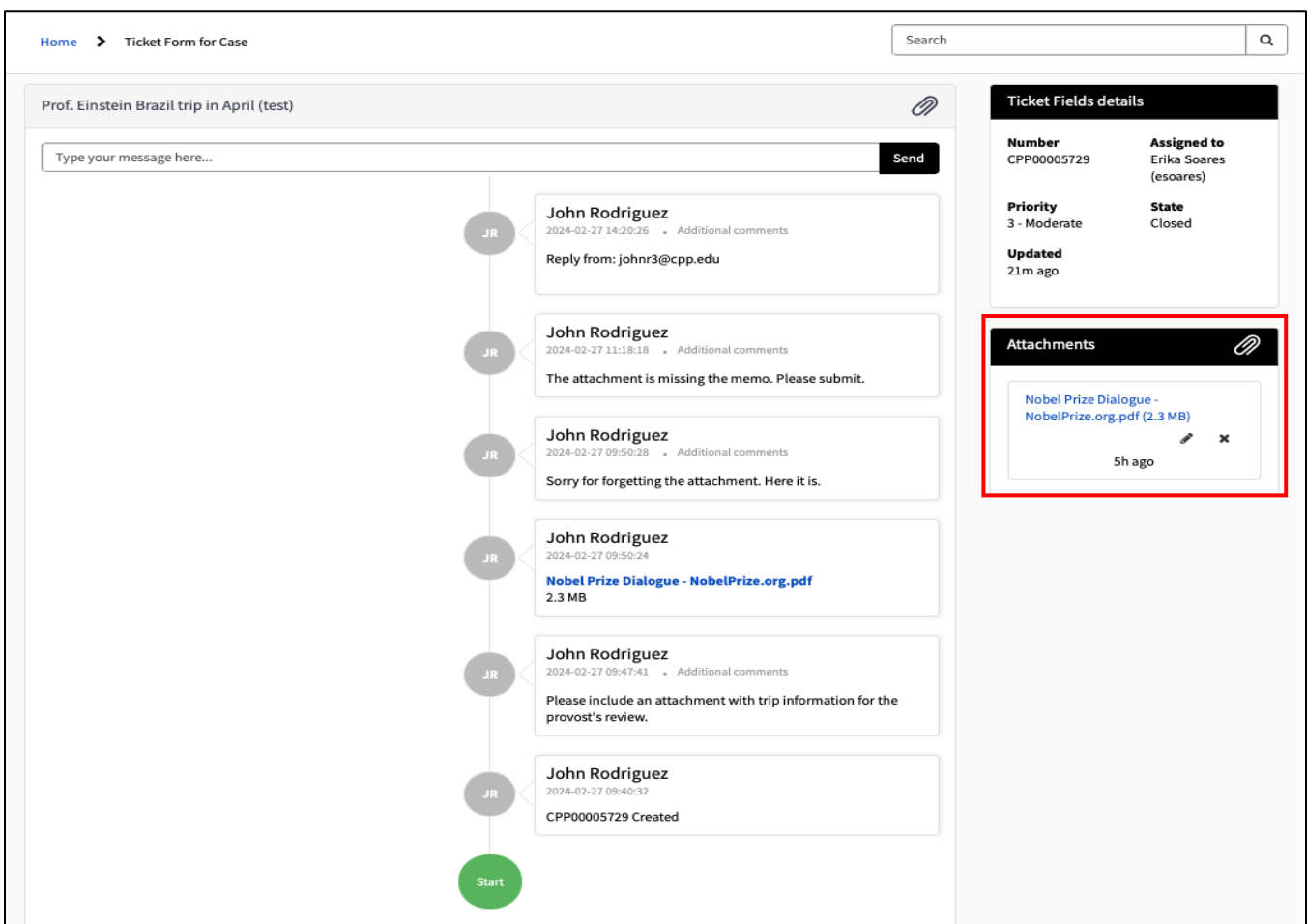
Sincerely,  
CPP Service Desk

## Downloading Signed Documents

Signed documents for approved requests will not be sent via email. Instead, they can be accessed and downloaded from their respective service tickets, where they are included as attachments.

Depending on how you access your tickets—whether via *My Tickets*, as above (*see p. 16*), or via the Service Portal link at the bottom of a system-generated email, as below—the arrangement of the information displayed on a ticket will vary. In either view, you will be able to find all the attachments and select the document(s) to download.

*Note:* When you select a document, it will download automatically to your computer's default download location. It will not open directly from the browser.



The screenshot displays a web interface for a service ticket titled "Prof. Einstein Brazil trip in April (test)". The interface includes a search bar at the top right, a message input field with a "Send" button, and a vertical timeline of messages from "John Rodriguez". The messages contain the following text:

- 2024-02-27 14:20:26: Reply from: johnr3@cpp.edu
- 2024-02-27 11:18:18: The attachment is missing the memo. Please submit.
- 2024-02-27 09:50:28: Sorry for forgetting the attachment. Here it is.
- 2024-02-27 09:50:24: Nobel Prize Dialogue - NobelPrize.org.pdf (2.3 MB)
- 2024-02-27 09:47:41: Please include an attachment with trip information for the provost's review.
- 2024-02-27 09:40:32: CPP00005729 Created

On the right side, the "Ticket Fields details" section shows:

Ticket Fields details	
<b>Number</b> CPP00005729	<b>Assigned to</b> Erika Soares (esoares)
<b>Priority</b> 3 - Moderate	<b>State</b> Closed
<b>Updated</b> 21m ago	

Below this, the "Attachments" section is highlighted with a red box and contains one attachment:

Attachments	
Nobel Prize Dialogue - NobelPrize.org.pdf (2.3 MB)	5h ago

The signed document(s) should then be submitted to the appropriate office or department, e.g., EODA/HR, Accounts Payable, etc.

Approved requests for faculty or staff travel should be uploaded and attached to a Travel Request in Concur.

## Frequently Asked Questions

### 1. Why has the Provost's Office implemented a service ticket system?

The service ticket system allows the Provost's Office to process requests more efficiently than by email. The system facilitates the routing and tracking of items within the Provost's Office team, maintains a record of communication and documentation within the ticket, and provides requesters greater visibility to monitor the status of their requests. An additional benefit is that the system is familiar to CPP users because it is already being utilized by IT and other offices.

### 2. How do I inquire about a ticket I've submitted?



Please do not email [provosts\\_docs@cpp.edu](mailto:provosts_docs@cpp.edu) or individual Provost's Office team members with questions about an active ticket. Instead, within the ticket you can type a question or comment in the message box and then post the message. You also may submit a question by replying to a CPP Service Desk email. With either method, the question or comment will be added to the ticket, and the team member working on the request will receive a notification that the ticket has been updated with new information.

### 3. I have a request that needs the provost's approval immediately. Can't I just email it to directly to everyone in the Provost's Office and follow up with a phone call?

No, all requests should be submitted through the portal. For urgent matters, create a ticket with the priority level set to Urgent, and then follow up with an email to [provosts\\_docs@cpp.edu](mailto:provosts_docs@cpp.edu) after submitting the ticket. Include the ticket number and urgency circumstances in the email.

### 4. I received a notification email with a comment asking me to provide additional information. How do I do that?

If the information request can be answered with a comment, then you can add the comment either by going to the ticket or by replying to the email. If the information requested requires a new or updated attachment, you can make that change within the ticket.

To add an attachment, select the  icon and upload the document(s). To rename an existing attachment, select the  icon and enter a new name. To delete an attachment, select the **X**.

### 5. How do I cancel a ticket if a request is no longer needed?

A requester cannot cancel a ticket once submitted. To cancel, add a comment to the ticket with a brief explanation for the request, e.g., "Please cancel this travel request. Prof. Einstein has decided not to attend the event." The Provost's Office team will then close the ticket.

### 6. What if I have general questions (not about a specific ticket) or need other help with using the service ticket system?

For general assistance, contact John Rodríguez, Provost's Office Administrative Analyst, by email at [johnr3@cpp.edu](mailto:johnr3@cpp.edu), by phone at 909.869.2075, or through Microsoft Teams.

## Additional Resources

### Travel

- Domestic
  - Domestic Travel information: <https://www.cpp.edu/academic-affairs/faculty-staff-resources/domestic-travel.shtml>
  - Sample domestic travel request memo: <https://www.cpp.edu/academic-affairs/faculty-staff-resources/domestic-travel-request-sample-memo2.pdf>
  - General Services Administration Continental U.S. Per Diem Rates: <https://www.gsa.gov/travel/plan-book/per-diem-rates?gsaredirect=perdiem>
- International
  - International Travel information: <https://www.cpp.edu/academic-affairs/faculty-staff-resources/international-travel.shtml>
  - Sample international travel request memo: <https://www.cpp.edu/academic-affairs/faculty-staff-resources/international-travel-request-sample-memo.pdf>
  - U.S. State Department Travel Advisory information: <https://travel.state.gov/content/travel/en/traveladvisories/traveladvisories.html/>
  - CSURMA High Hazardous and War Risk Country List: <https://www.calstate.edu/csu-system/administration/business-finance/systemwide-risk-management/Documents/23-24%20High%20Hazardous%20Country%20List.pdf>
  - U.S. State Department Foreign Per Diem Rates: [https://aoprals.state.gov/content.asp?content\\_id=184&menu\\_id=78](https://aoprals.state.gov/content.asp?content_id=184&menu_id=78)
- Student
  - Academic Field Trip Participant List: <https://www.cpp.edu/rms/academic-field-trip-participant-list-5-03-23.pdf>
  - Release of Liability Form: <https://www.cpp.edu/rms/forms/release-of-liability-2022.pdf>
- General Information
  - CSU Travel and Business Expense Payments policy: <https://calstate.policystat.com/policy/14626378/latest/>
  - CPP University Travel home page: <https://www.cpp.edu/fas/university-accounting-services/travel/about.shtml>
  - CPP Travel Checklist: [https://www.cpp.edu/fas/university-accounting-services/docs/travel/CPP%20Travel%20Checklist\\_Final%20w\\_Links.pdf](https://www.cpp.edu/fas/university-accounting-services/docs/travel/CPP%20Travel%20Checklist_Final%20w_Links.pdf)
  - Concur Resources and Training Library: <https://www.cpp.edu/fas/university-accounting-services/travel/concur.shtml>



- Missing Receipt Affidavit: [https://www.cpp.edu/fas/university-accounting-services/docs/travel/missing-receipt-affidavit\\_accessible.pdf](https://www.cpp.edu/fas/university-accounting-services/docs/travel/missing-receipt-affidavit_accessible.pdf)
- Travel Procedures Exception Request: [https://www.cpp.edu/fas/university-accounting-services/docs/travel/travel-procedures-exception-request\\_accessible.pdf](https://www.cpp.edu/fas/university-accounting-services/docs/travel/travel-procedures-exception-request_accessible.pdf)

## Personnel

- EODA/HR Operations
  - EODA/HR Operations home page: <https://www.cpp.edu/eoda-hr/index.shtml>
  - Classification and Compensation Dept. home page: <https://www.cpp.edu/eoda-hr/departments/companclass/index.shtml>
  - Talent Acquisition Dept. home page: <https://www.cpp.edu/eoda-hr/departments/ta/index.shtml>
- Academic Resources
  - Personnel Action Checklist for Recruitments: <https://www.cpp.edu/academic-resources/authenticated/personnel-action-checklist-recruitments-rev-2023-08-07.pdf>
  - Personnel Action Checklist for Permanent Changes: <https://www.cpp.edu/academic-resources/authenticated/personnel-action-checklist-permanent-changes-rev-2023-08-07.pdf>
  - Personnel Action Checklist for Temporary Changes: <https://www.cpp.edu/academic-resources/authenticated/personnel-action-checklist-temporary-changes-rev-2023-08-07.pdf>

## Finance

- Direct Pay Form (F-3820): [https://www.cpp.edu/fas/university-accounting-services/docs/Accounts%20Payable/f3820\\_direct\\_pay\\_form\\_032020.pdf](https://www.cpp.edu/fas/university-accounting-services/docs/Accounts%20Payable/f3820_direct_pay_form_032020.pdf)
- Disbursement Voucher (std. 439): <https://www.cpp.edu/fas/university-accounting-services/docs/Accounts%20Payable/Disbursement%20Voucher%202015.pdf>
- Monthly Corporate Travel Card Summary: [https://www.cpp.edu/fas/university-accounting-services/docs/travel/monthly-corporate-travel-card-summary\\_final.pdf](https://www.cpp.edu/fas/university-accounting-services/docs/travel/monthly-corporate-travel-card-summary_final.pdf)

## Other

- University-Sponsored Alcohol Approval Form: <https://www.foundation.cpp.edu/content/f/d/FS01104F.pdf>
- Hospitality Authorization Form: <https://www.cpp.edu/fas/university-accounting-services/docs/hospitality/Hospitality%20Authorization%20Form.pdf>
- Key Request Form: <https://www.cpp.edu/fpm/docs/forms/key-request-form.pdf>