

How to Use the New SDCOE Service Portal (PeopleSoft Users)

March 2019 Third Thursday Demo | March 21, 2019 | For PeopleSoft Users | v1.0

Notes:

1. Go to <http://crc.sdcoe.net/projects/servicenow>
 - a. Download *Getting Started Worksheet and Directions (2 pp.)* - Go to p.2
2. **Accounts**
 - a. All existing HEAT users were set up with an account
 - b. For new accounts, a district's "Primary PeopleSoft Contact" should submit a Service Portal "Request" ticket. Select ServiceNow and "Create/Remove user account." Provide the Name, Employee ID, Job Title, Email Address, and Phone # (with Extension, if necessary).
3. **Password**
 - a. Your Temp password is listed on the main page of HEAT until April 30, 2019
4. **Log In to the SDCOE Service Portal**
 - a. <https://service.sdcoe.net> – Chrome or Firefox are recommended
 - b. Log in with your email address and Temp password (get from HEAT)
 - c. Create new password
5. **"Forgot My Password" / Password Reset**
 - a. Aiming to have password reset functionality ready by March 27 so you can reset it yourself
 - b. Can be done from a smartphone at this time (same URL - <https://service.sdcoe.net>)
6. **Homepage > Knowledgebase to search knowledgebase articles (Also called "KB")**
 - a. Search categories on left. Examples: Purchasing, Absence Management
 - b. Search by keywords using the top search bar. Examples: payroll, combo code
 - c. Search as needed to prevent you from the need to enter a ticket. Example: TLX01540
 - d. Favorite by clicking the star at the top-left
 - e. Use the star rating and Helpful (Yes/No), if desired. "Add a comment" is intended for you to post related information to help other users.
7. **Homepage > "EBS" (blue square) to submit a ticket**
 - a. Pick from 7 categories.
 - b. Complete the form. Attach a document (paper clip icon is at top of screen), if necessary, click Submit. If you forget to attach, you can do it after at any time.
8. **Homepage > Check Status to find all of your tickets**
 - a. Click INC to open the ticket. You can type a message to your agent here.
 - b. From the grid, sort by column headers.
 - c. Click the blue wheel to personalize.
 - d. Click the 3 lines next to a column header to export.
9. **My Profile**
 - a. For changes to your Title, Phone, Email (if Email changes, you will need to have us change ID)
 - b. Specify your preferred date format here
10. **More information at <http://crc.sdcoe.net/projects/servicenow>**
 - a. Download *SDCOE Service Portal User Guide v1.0.pdf* (11 pp.)
 - b. Video