

# SDCOE Service Portal: District Demo

INTEGRATED TECHNOLOGY SERVICES

Presented by Peyri Herrera, Anthony Rodgers, Mark Zecca  
Education Business Systems

March 1, 2019

# About Today's Session

This demo is for District PeopleSoft Contacts who currently enter HEAT tickets and would like to learn about the transition from HEAT to the SDCOE Service Portal (powered by ServiceNow).



PLEASE HELP SHARE WHAT YOU LEARN WITH YOUR TEAMS

## AGENDA

### Overview & Context

- Who, What, Where, When, and Why are we transitioning from HEAT to the SDCOE Service Portal

### Discussion/Activity

- What kinds of HEAT tickets do YOU enter?

### Demo

- How to submit a ticket
- How to use the knowledgebase (KB)

### Training Plan + Q&A

### EBS Update

- Presentation by Dr. Mark Zecca

# Overview & Context

New Issue/ 00162499

▼ [Subset](#)

*Customer ID: 122105	First Name: Meyri
District: SDCOE-EBS	Last Name: Herrera
School:	Phone: 358-569-5463 Ext.
E-Mail: pherrera@sdcoe.net	Alternate Phone: Ext.

▼ [CallLog](#)

**New Record** Last Updated By: Helpdesk  
Date: 2/27/19 12:41 PM

*Incident Description:	Solution Description:
*Category: <input type="text"/>	*Status: Open
*Sub-Category: <input type="text"/>	

▼ [Details](#)

▼ [Journals](#) - 0 of 0

Add a new Note

▼ [Attachments](#)

Add an Attachment

name	path	exists

Displaying 1 - 0 of 0

# Current: HEAT

Received Date	Call ID	Call Status	Call Type	Call Description	CloseDesc
4/13/18	<a href="#">00146...</a>	Closed	Issue		
1/5/18	<a href="#">00141...</a>	Closed	Security		
9/18/17	<a href="#">00135...</a>	Closed	Security		
6/12/17	<a href="#">00124...</a>	Closed	Query		
6/1/17	<a href="#">00123...</a>	Closed	Security		
11/14/16	<a href="#">00107...</a>	Closed	Security		
11/8/16	<a href="#">00107...</a>	Closed	Issue		
10/10/16	<a href="#">00104...</a>	Closed	Security		
9/23/16	<a href="#">00102...</a>	Closed	Security		
7/1/16	<a href="#">00091...</a>	Closed	Query		
7/1/16	<a href="#">00091...</a>	Closed	Security		
6/27/16	<a href="#">00090...</a>	Closed	Security		
6/15/16	<a href="#">00089...</a>	Closed	Query		
6/1/16	<a href="#">00088...</a>	Closed	Security		
5/13/16	<a href="#">00087...</a>	Closed	Security		

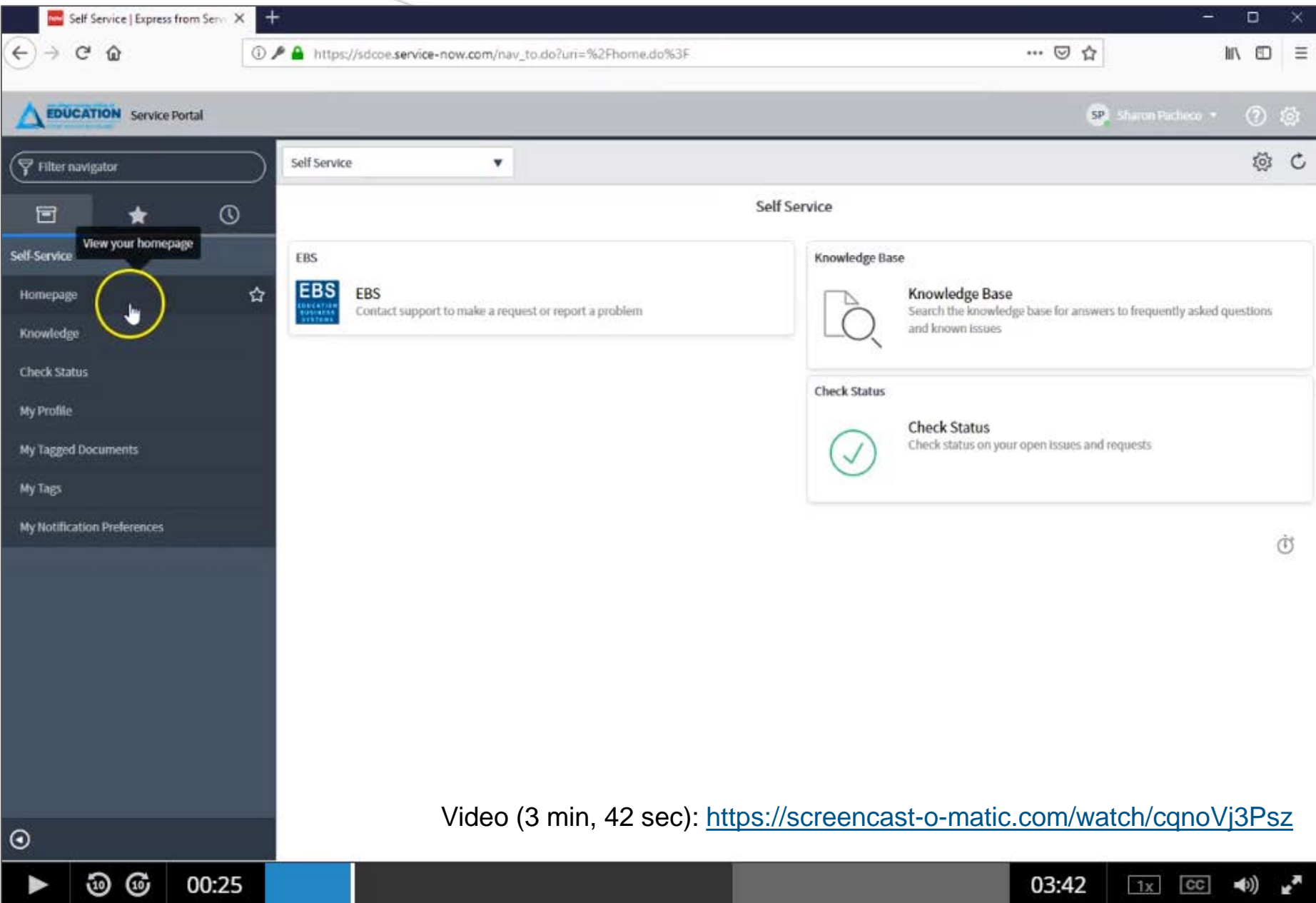
« « » »

# 1. Why are we changing from HEAT to the SDCOE Service Portal?

- SDCOE's Integrated Technology Services division is moving to the ServiceNow platform for many of its services, including Educational Business Systems (EBS), Student Information Systems, networking, and more.
- A unified solution - A solution for ITS' initiative to offer a one-stop shop for customers
- Improved efficiencies
- Cost-savings
- Improved tool and functionality
- Web-based + can be used on phones/tablets
- Potential to replace other tracking systems
  - Problem Management, Projects

## 2. How will this be different than what a PeopleSoft Contact does currently in HEAT? What are the benefits?

- New URL (<https://service.sdcoe.net>)
- New login – email address instead of ID (and you will be issued a temp password)
- You will pick from 7 “forms” to submit your ticket
- You will have a lot more opportunity to interact with your ticket! More feedback, more tracking, this is where you will go to see the status and interact (type in the box and it adds to the ticket activity)
- A ticket will be in a “Resolved” state for 10 days before it becomes “Closed.”
- You can Resolve, Close, and Re-Open a ticket yourself
- Knowledgebase (KB) is being built! Search it first to see if the answer you’re looking for is there.



# New: SDCOE Service Portal

## KEY FEATURES:

- EBS “blue square” to submit a ticket
- Knowledgebase
- Check Status

Video (3 min, 42 sec): <https://screencast-o-matic.com/watch/cqnoVj3Psz>

# New: Knowledgebase Articles




EBS Know Search (minimum 3 characters)

Categories Tags

Filter Categories

- ▶ PeopleSoft ESS 1
- ▶ PeopleSoft FIN 6
- ▼ PeopleSoft General 3
- GN - General 3
- ▶ PeopleSoft HCM 23
- ▶ PeopleSoft Hyperion 4

## GN - General

- 
**Notifications are routing to wrong**  
 KB0010098 • Authored by Rhonda  
 Topic: Notifications are routing to emp  
 Summary Information: N/A Detailed I  
 Knowledge Base: EBS Knowledge B
- 
**Security: Job Data exists for a new**  
 KB0010044 • Authored by Tatiana P  
 Topic: Job Data was entered for a ne  
 Summary Information: After Job Data  
 Knowledge Base: EBS Knowledge B
- 
**Query Manager: A query is access**  
 KB0010049 • Authored by Tatiana P  
 Topic: A query is accessible in Query  
 security requirements many existing  
 Knowledge Base: EBS Knowledge B

Home / PeopleSoft General / GN - General

## Notifications are routing to wrong email address or not at all

KB0010098  
☆☆☆☆ 4 views

**Topic:** Notifications are routing to employee's personal email or to email for district they were previously employed at or not routing at all.


**Summary Information:** N/A

**Detailed Information:** The email address associated with the PeopleSoft User Profile is incorrect. All employees can edit their User Email Address in Portal or ESS > Main Menu > My System Profile. Anyone who resets passwords for your organization can also edit this using the Distributed User Profile screen.


**Special/Important Notes:** The CRC does not update User Profile email addresses for employees, so no support ticket should be necessary.

**Meta:** "notifications" "e-mail" "workflow" "User Profile" "email" "routing"

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 Authored by Rhonda Caldwell  
Last modified 5 hours ago

Helpful?

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### 3. What are the steps to transition from HEAT to the new Service Portal?

- **When is Go Live?** Wed, March 27, 2019
- **Closed HEAT Tickets:** Your district's history of closed HEAT tickets will be provided to the "Primary PeopleSoft Contacts" as an Excel file.
- **Active HEAT Tickets:** EBS will convert any active HEAT tickets to ServiceNow tickets and communicate to the customer the new INC #.
  - For active tickets entered 12/31/18 or earlier, we will move these over by March 27.
  - For active tickets entered 1/1/19 - 3/26/19, we will move these over by April 12.
- **How long will I have access to HEAT?** Based on the District Feedback Session in December 2018, you will have access to HEAT thru April 30 to look up tickets. However, beginning March 27, please do not submit new tickets in HEAT; use the new Service Portal.

## 4. How have districts been involved? How will they learn about the changes?

- **December 2018:** First announcement, CRC webpage launched, district feedback session
- **January 2019:** Announcements
- **February 2019:** Parallel Test with 2 districts (Santee, Lemon Grove), announcements, User Group Meetings (HCM, Purchasing, Hyperion)
- **March 2019:** Message in HEAT Self-Service, job aid published, 3 district demos, 2 hands-on training sessions for district Primary PeopleSoft Contacts and “HEAT Point People”, Third Thursday Demo, live online training on the day of Go Live, announcements
- **April 2019:** Survey

Contact support to make a request or report a problem

## Items

### "How To" Help

How to use PeopleSoft to perform a task

### "Fix It" Help

Data Fixes, Process not working, etc

### Requests

Query/data requests, data uploads, Hyperion extracts, training requests

### Security Request

Roles, Workflows, etc.

### Performance Issue

Spinning, slowness, error messages

### Report an Outage

System down

### Ask a General Question

For non-PeopleSoft questions

# Activity: “What types of tickets do YOU enter?”

Put checkmarks  
next to those that  
you enter and list  
some examples.

# What is the general flow?

## 1. You (District User aka Customer) submit a ticket using the Service Portal.

Suggestion: Search KB first.

- Pick from 7 forms. Enter necessary information based on selected form.
- The ticket # appears and a confirmation on the screen appears.
- The system sends an email notification to you (Customer) upon submitting the ticket.
- You can go into the ticket at any time and see the status. You are encouraged to enter your questions/follow-up directly on the ticket.

## 2. NEW

- The system sends the ticket to the appropriate group based on ticket information.

## 3. ACTIVE

- The ticket is assigned to an Agent.
- The system will add a work activity to show that the ticket was assigned.

## 4. WORK IN PROGRESS

- The Agent changes the status to "Work In Progress" and works the ticket.
- Agent documents all work performed on the ticket. Adds "Additional comments" (customer visible).
- **Customer can type on the ticket at any time.**
- All actions are recorded in the "Activity" section.
- **The system sends email notifications to the Customer when the Agent uses "@".**

## 5. RESOLVED

- The Agent resolves the issue/request and marks ticket "Resolved."
- Resolved means the issue/request is resolved but the ticket is not yet "closed."
- **The system sends an email notification to the Customer when the ticket is marked Resolved.**
- **IMPORTANT CHANGE! The Customer closes the ticket. Or types a comment to acknowledge the ticket can be closed.**

## 6. CLOSED

- **Upon receiving notification from the Customer that the ticket is complete, Agent changes the status to "Closed."**
- NOTE: The system will automatically close Resolved tickets after 10 days.
- Customer can re-open a ticket.

# DEMO

1. How to log in
2. How to search the Knowledgebase first
3. How to submit a ticket
4. Email notifications you will receive
5. How to check the status of a ticket
6. How to interact with the Agent
7. What the process of resolving and closing a ticket looks like

# TRAINING PLAN + Q&A

Option	Length/Duration	Audience	Format/Features	Content
<b>Job Aid</b>	2-4 pages	Recommended for anyone who enters a ticket	<ul style="list-style-type: none"> <li>Step-by-step directions</li> <li>Screenshots</li> </ul>	<ul style="list-style-type: none"> <li>How to log in</li> <li>How to search the knowledgebase</li> <li>How to enter a new ticket</li> <li>How to interact with tickets (message the agent, check the status, view all)</li> </ul>
<b>Hands-On Training</b> TUE 3/12 NCREC 9:30-10:45 FRI 3/22 SDCOE 9:30-10:45	75 minutes <ul style="list-style-type: none"> <li>15 min presentation</li> <li>20 min training</li> <li>20 min exploration of Knowledgebase (KB)</li> <li>20 min Q&amp;A</li> </ul>	Recommended for "Primary PeopleSoft Contacts" or their designees to attend hands-on training to help disseminate the information to fellow district PeopleSoft Contacts	<ul style="list-style-type: none"> <li>Face-to-face</li> <li>Hands-on</li> <li>Instruction &amp; discussion</li> </ul>	<ul style="list-style-type: none"> <li>Same content as job aid</li> </ul>
<b>Third Thursday Demo</b> THU 3/21 ONLINE	20-30 minutes	Recommended for anyone who enters a ticket	<ul style="list-style-type: none"> <li>Recorded and available for playback</li> </ul>	<ul style="list-style-type: none"> <li>Same content as job aid</li> </ul>
<b>Online Live Training</b> WED 3/27 ONLINE 9 AM, 11 AM, 1 PM, 3 PM	20 minutes, conducted 4x throughout the day of go live (March 27)	Recommended for anyone who enters a ticket	<ul style="list-style-type: none"> <li>In Production</li> <li>Online</li> <li>Hands-on or watch</li> <li>Quick steps to help users get started</li> <li>Read the job aid for the additional information</li> </ul>	<ul style="list-style-type: none"> <li>How to log in</li> <li>How to enter a new ticket</li> </ul>

# EBS UPDATE

## DR. MARK ZECCA

### ServiceNow and Fluid

- The ServiceNow Project is the first of fundamental services moving forward
- Fluid (User Interface reengineering)

### CAB (Customer Advisory Board)

- The CAB is now addressing districtwide system needs

### Issues & Enhancements

- Project visibility

### Futures:

- Data4Districts
- TL&S
- Benefits
- Correct History