SDCOE Service Portal

User Guide for District PeopleSoft Contacts

Version 1.0 | Updated March 11, 2019

Contents

san diego county office of
EDUCATION
FUTURE WITHOUT BOUNDARIES℠

PREPARED BY THE SDCOE CUSTOMER RESOURCE CENTER

For additional information about this publication please contact Peyri Herrera, Customer Resource Center Director.
Contact information: pherrera@sdcoe.net, (858) 569-5463.

Quick Start Directions

Login

NOTE: The optimal browsers are Chrome and Firefox.

1. Go to https://service.sdcoe.net
2. User name = Your email address. Password = ________________________
3. You will be prompted to create a new password: Password must be at least 8 characters long and contain a digit, an uppercase letter, and a lowercase letter

Search the knowledgebase

1. Click **Knowledge**.
2. Select the **EBS Knowledge Base**.
3. Enter search criteria. Or use the Categories.

For "how to" assistance and issue resolution, it is recommended that you search the knowledgebase prior to entering a new ticket.

Create a new ticket

1. From Homepage, click **EBS** (the blue square).
2. There will be 7 forms. Select the appropriate form that matches the nature of your request or incident.
3. Complete the fields.
4. Click Submit.

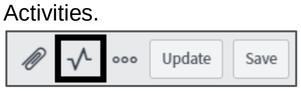
Add an attachment to a ticket

1. When creating a new ticket or updating an existing ticket, click the **paper clip icon** at top of screen.
2. Find and select the attachment (like .pdf, .jpg, .gif, .xlsx, .docx, etc.).
3. Click Submit.

You can add attachments both before and after you submit.

Check the status of a ticket

1. Click **Check Status**.
2. View the state of the ticket on the grid (New, Active, Work In Progress, Resolved, Waiting Customer, etc.).
3. To view the activity on a ticket, click the INC hyperlink to open the ticket. Scroll down to the "Activities" section of the screen. TIP: Click the "Show Activity Stream" icon to jump to the Activities.

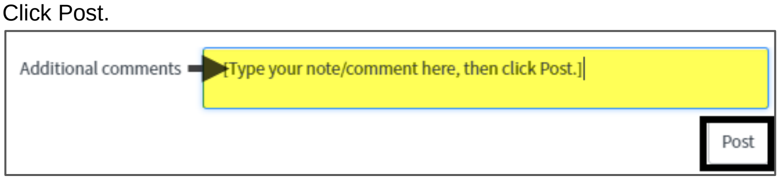


Other things you can do: Sort/filter the tickets on Check Status, export the tickets (3 lines).

Add notes on a ticket or "message the agent" (by adding a note)

You can interact with the agent on a ticket by typing a note. Examples: "I forgot to mention that this is for Empl Record 1" or "I attached an additional screenshot for you to look at" or "Hi Becky, can you please provide an update?"

1. Click **Check Status**.
2. Click the INC hyperlink to open the ticket.
3. Type a comment or message in the Additional Comments box.
4. Click Post.



Other thing you can do: Open the ticket, click the 3 dots icon, enter tag(s) for a ticket. View tags from My Tagged Documents and My Tags.

View an attachment added by an agent, if applicable

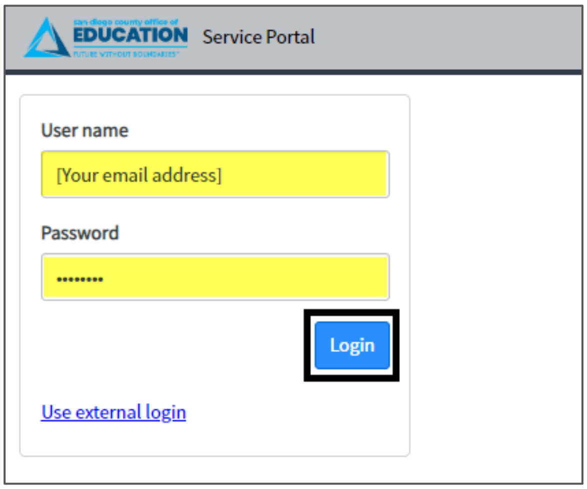
1. Locate and open the ticket.
2. Click the attachment added by the agent.

Logging In

Browsers

The optimal browsers are Chrome and Firefox.

Logging In



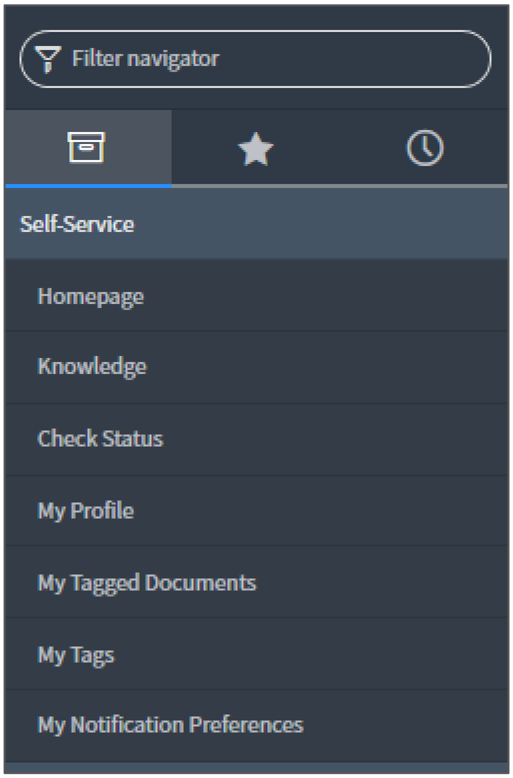
1. Go to https://service.sdcoe.net.
2. **User name** = Your email address. **Password** = ___________________________
   Please see your organization's Primary PeopleSoft Contact for assistance with your password.
3. Click **Login**.
4. **FIRST LOGIN:** You will be prompted to create a new password that meets the password requirements.

Password Requirements

Password must be at least 8 characters long and contain a digit, an uppercase letter, and a lowercase letter.

Navigation Bar

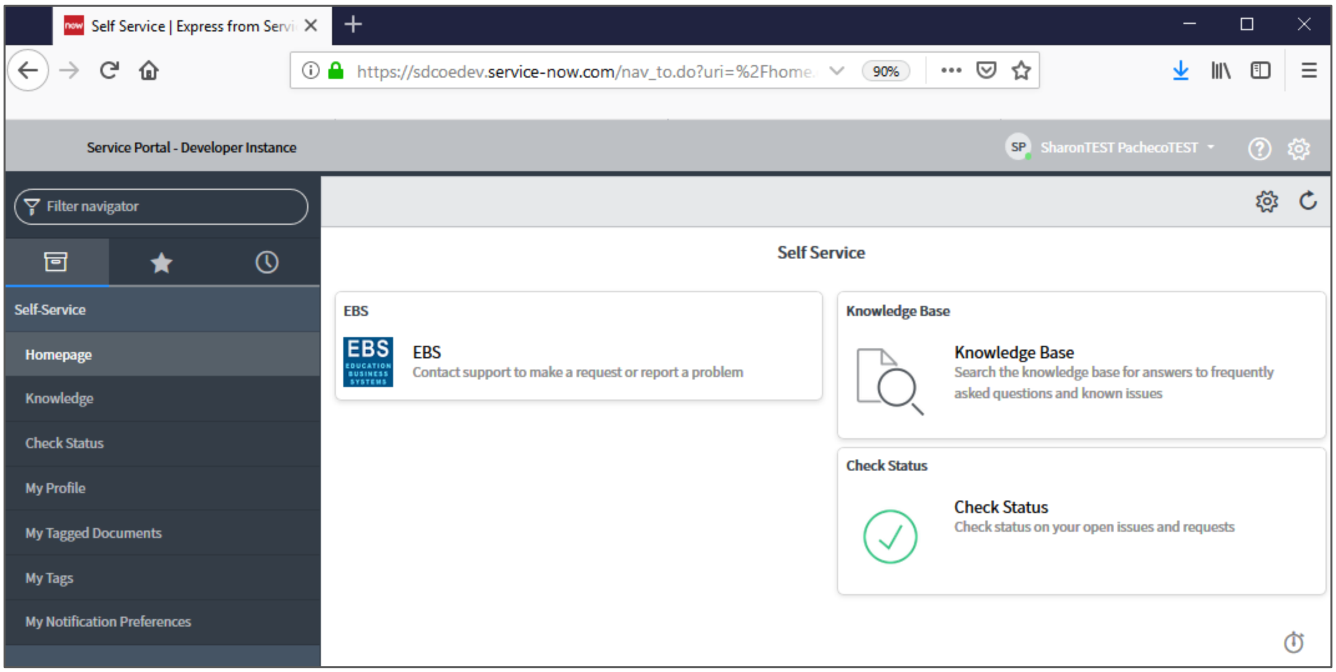
Get around the Service Portal using the **navigation bar (navbar)** on the left-side of the screen.



- The 3 icons are for **All Applications**, **Favorites**, and **Your History**.
- You can “favorite” screens, knowledgebase articles, and incidents (tickets). These show up on the Favorites screen.
- See the next pages for details about each screen.

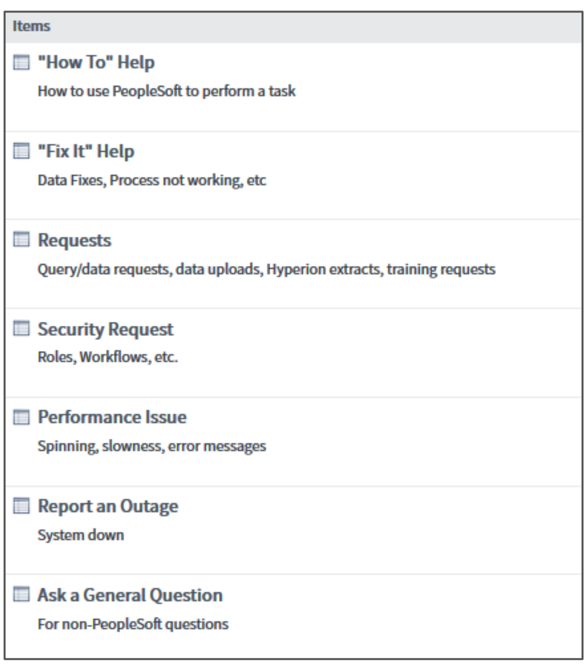
Homepage

*Use **Homepage** to create a new ticket, as well as search the knowledgebase and check the status of a ticket.*



Click **Homepage** to access 3 functions:

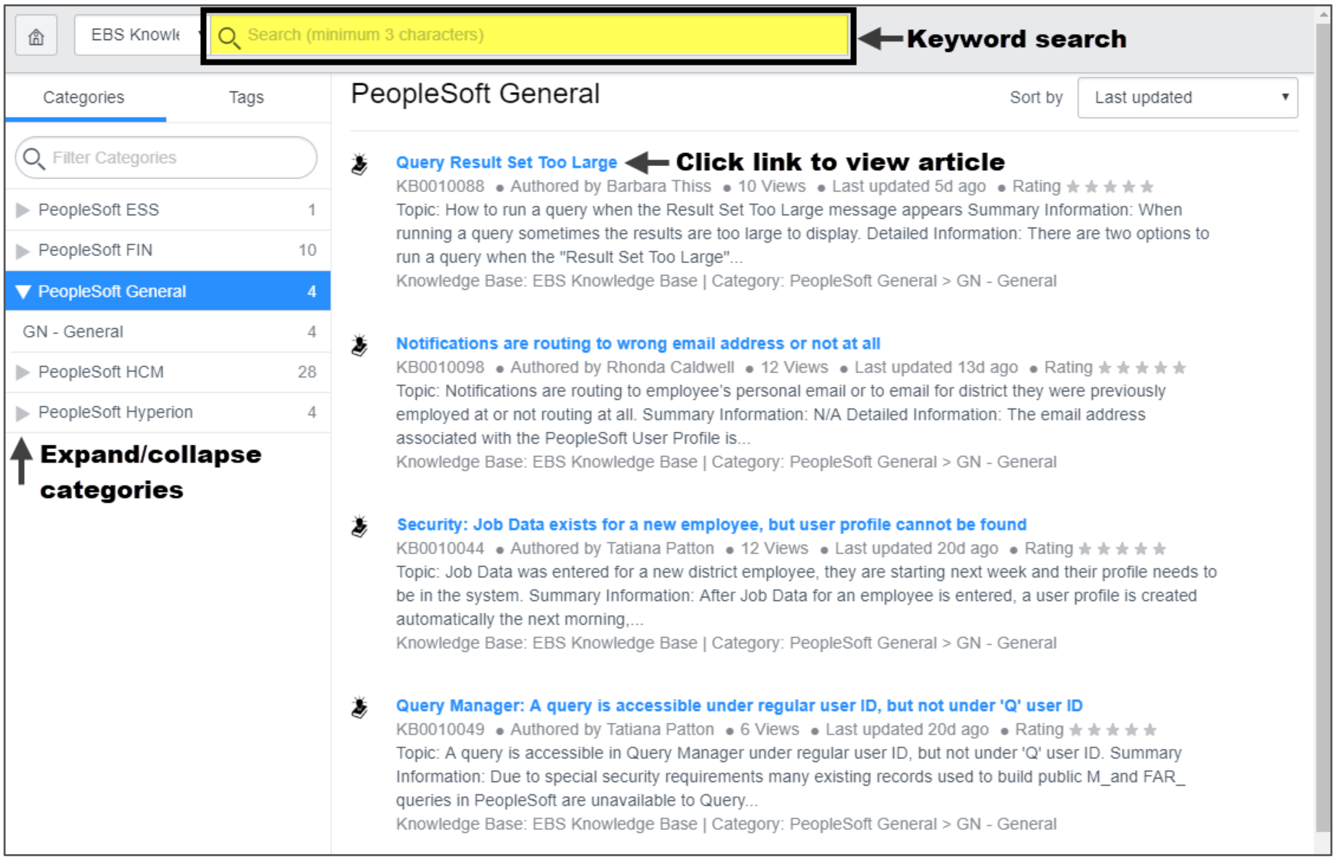
- **EBS Button (blue button)** = Enter a new ticket. Pick from **7 forms** in the Service Catalog.



- **Knowledge Base** = Search the KB – goes to the same screen as “Knowledge” in the navbar
- **Check Status** = Look up an existing ticket – goes to the same screen as “Check Status” in the navbar

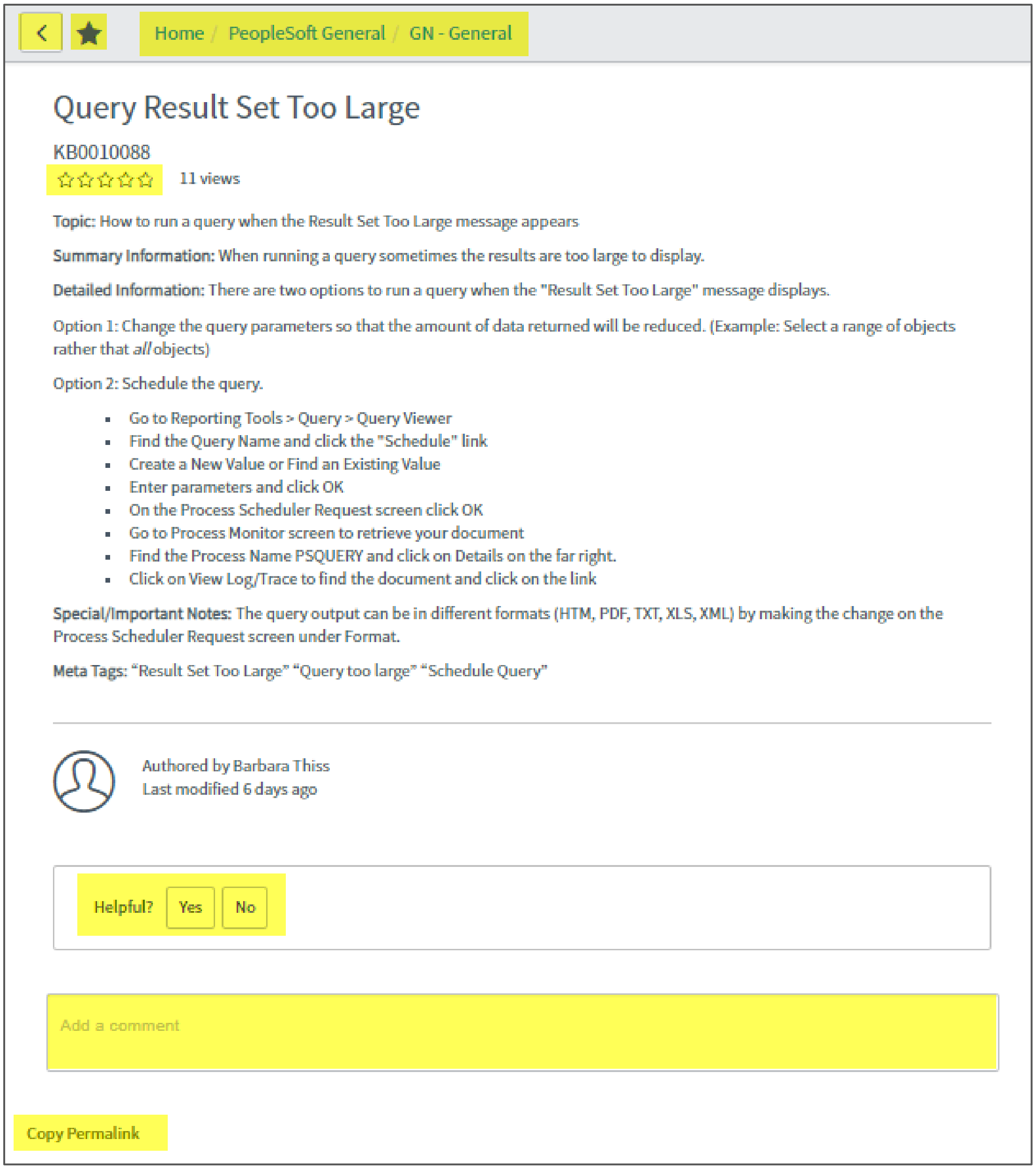
Knowledge

*Click **Knowledge** to search the EBS Knowledgebase.*



- Search using the **search box** (top of screen) or the **categories** and **tags** (left side of screen).
- Click a link to view the article. See the sample article on the following page.

Sample Knowledgebase Article



Home / PeopleSoft General / GN - General

Query Result Set Too Large

KB0010088

11 views

Topic: How to run a query when the Result Set Too Large message appears

Summary Information: When running a query sometimes the results are too large to display.

Detailed Information: There are two options to run a query when the "Result Set Too Large" message displays.

Option 1: Change the query parameters so that the amount of data returned will be reduced. (Example: Select a range of objects rather that *all* objects)

Option 2: Schedule the query.

- Go to Reporting Tools > Query > Query Viewer
- Find the Query Name and click the "Schedule" link
- Create a New Value or Find an Existing Value
- Enter parameters and click OK
- On the Process Scheduler Request screen click OK
- Go to Process Monitor screen to retrieve your document
- Find the Process Name PSQUERY and click on Details on the far right.
- Click on View Log/Trace to find the document and click on the link

Special/Important Notes: The query output can be in different formats (HTM, PDF, TXT, XLS, XML) by making the change on the Process Scheduler Request screen under Format.

Meta Tags: “Result Set Too Large” “Query too large” “Schedule Query”

Authored by Barbara Thiss
Last modified 6 days ago

Helpful? Yes No

Add a comment

Copy Permalink

Useful features:

- Click the back arrow to go back
- Click the star to “favorite” an article
- Use the breadcrumbs to navigate to other articles in the same categories
- Click the stars to rate the article
- Click Yes/No to indicate if you found the article helpful
- Add a comment if you have additional relevant information to provide about this topic that other users might find useful
- Click “Copy Permalink” to obtain the URL of the article

Check Status

*Click **Check Status** to see "My Open Incidents" and "My Closed Incidents."*

Check Status

My Open Incidents

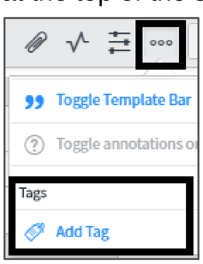
Number ▲	Caller	Category	Subcategory	Priority	State	Assignment group	Assigned to	Created	Resolved	Resolve time	Time worked	Module	Close code
INC0015726	SharonTEST PachecoTEST	EBS	PeopleSoft Human Capital Management (HCM)	3 - Moderate	Active	EBS HCM Intake	Matthew Swartout	2019-02-11 10:55:09	(empty)			BA - Benefits Administration	
On Demand event. EE ID 123456, ER 0. Phoebe Buffay													
INC0015727	SharonTEST PachecoTEST	EBS	PeopleSoft Human Capital Management (HCM)	3 - Moderate	Work In Progress	EBS HCM Intake	Rhonda Caldwell	2019-02-11 10:56:27	(empty)			PY - Payroll	
Joey Tribbiani EE ID 234567, needs to have access to approve PAF's.													
INC0015729	SharonTEST PachecoTEST	EBS	PeopleSoft Human Capital Management (HCM)	3 - Moderate	Work In Progress	EBS HCM Intake	Janine Perez	2019-02-11 10:59:58	(empty)		1,864	PY - Payroll	
EE ID 345678, Please remove the top row dated 6/20/17 from her direct deposit record													
INC0015743	SharonTEST PachecoTEST	EBS	PeopleSoft Portal	4 - Low	Waiting Customer	EBS Security	Rhonda Caldwell	2019-02-11 14:42:06	(empty)			GN - General	
How do I set my "out of office" for PeopleSoft?													

Save | Actions on selected rows... | 1 to 4 of 4

My Closed Incidents

Number ▲	Caller	Category	Subcategory	Priority	State	Assignment group	Assigned to	Created	Resolved	Resolve time	Time worked	Module	Close code
INC0015721	SharonTEST PachecoTEST	EBS	PeopleSoft Human Capital Management (HCM)	3 - Moderate	Closed	EBS Team	Joan DeKoven	2019-02-11 10:36:21	2019-02-11 11:34:11	3,470		HR - Human Resources	District Data/User
Salary Schedule update, Salary Plan 001 - Effective 7/1/18													
INC0015722	SharonTEST PachecoTEST	EBS	PeopleSoft Human Capital Management (HCM)	2 - High	Closed	EBS HCM Intake	Matthew Swartout	2019-02-11 10:40:34	2019-02-11 11:38:51	3,497		BA - Benefits Administration	System Set Up/Configuration

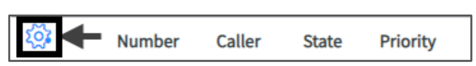
- **Click the INC hyperlink:**
  1. Get the details on the ticket
  2. Message your agent and/or add notes on the ticket
  3. Add an attachment to the ticket
  4. Add a tag to the ticket (done from the 3 dots at the top of the screen)



  5. For active tickets only: Resolve/close the incident yourself (for example, no longer an issue)
  6. For closed tickets only: Reopen the incident yourself

- **Sort:** Click a column header to sort (like State to see tickets grouped together by Active, Work In Progress, Waiting Customer, Resolved).

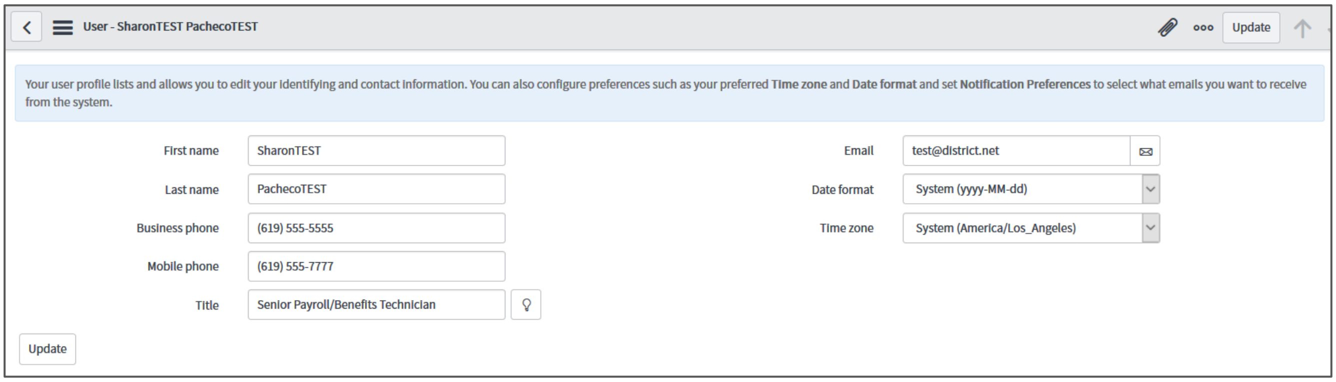
- **Customize Columns:** Click the blue wheel icon to customize which columns are displayed (add/remove/move up/move down columns). Examples: Add "Module", remove "Category", remove "Caller."



- **Export to Excel:** Click the 3 lines next to a field, like Number, and select Export.

My Profile

*Go to **My Profile** to update your name, phone number, job title, email address, date format, and time zone.*

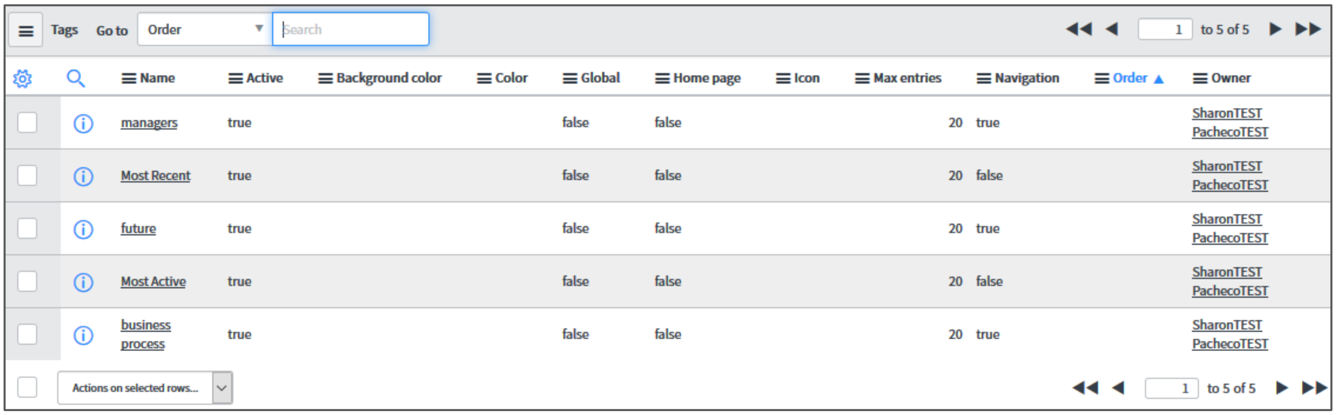


NOTE: The **Email** field handles where email notifications are sent. This field is separate than the User ID field (which is your email address). If you need to update your User ID, please submit a request ticket.

My Tags and My Tagged Documents

My Tags

*Manage your tags from **My Tags**.*



		Name	Active	Background color	Color	Global	Home page	Icon	Max entries	Navigation	Order ▲	Owner
	ⓘ	managers	true			false	false		20	true		SharonTEST PachecoTEST
	ⓘ	Most Recent	true			false	false		20	false		SharonTEST PachecoTEST
	ⓘ	future	true			false	false		20	true		SharonTEST PachecoTEST
	ⓘ	Most Active	true			false	false		20	false		SharonTEST PachecoTEST
	ⓘ	business process	true			false	false		20	true		SharonTEST PachecoTEST

My Tagged Documents

*Go to **My Tagged Documents** to search for items based on the tags you have created.*