

SDCOE

Service Portal

User Guide for District PeopleSoft Contacts

Version 1.0 | Updated March 11, 2019

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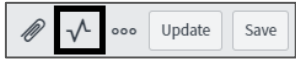
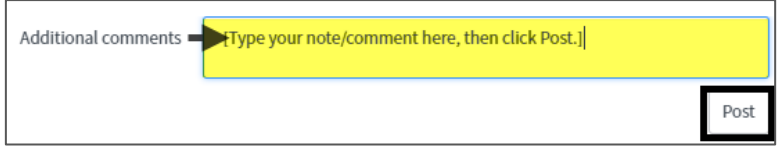


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For additional information about this publication please contact Peyri Herrera, Customer Resource Center Director.
Contact information: pherrera@sdcoe.net, (858) 569-5463.

Quick Start Directions

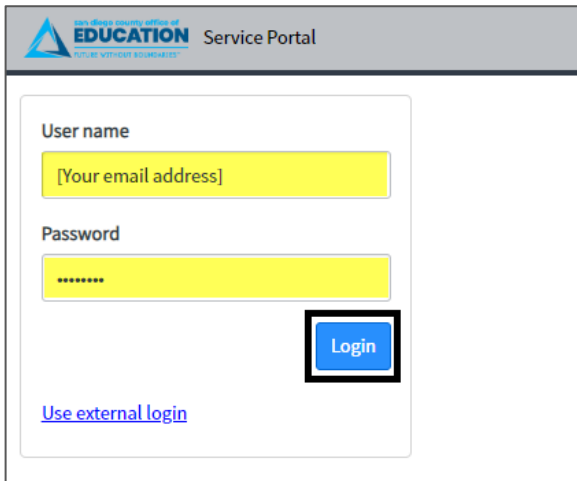
<p>Login</p>	<p>NOTE: The optimal browsers are Chrome and Firefox.</p> <ol style="list-style-type: none"> 1. Go to https://service.sdcoe.net 2. User name = Your email address. Password = _____ 3. You will be prompted to create a new password: Password must be at least 8 characters long and contain a digit, an uppercase letter, and a lowercase letter
<p>Search the knowledgebase</p>	<ol style="list-style-type: none"> 1. Click Knowledge. 2. Select the EBS Knowledge Base. 3. Enter search criteria. Or use the Categories. <p>For “how to” assistance and issue resolution, it is recommended that you search the knowledgebase prior to entering a new ticket.</p>
<p>Create a new ticket</p>	<ol style="list-style-type: none"> 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.
<p>Add an attachment to a ticket</p>	<ol style="list-style-type: none"> 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. <p>You can add attachments both before and after you submit.</p>
<p>Check the status of a ticket</p>	<ol style="list-style-type: none"> 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.  <p>Other things you can do: Sort/filter the tickets on Check Status, export the tickets (3 lines).</p>
<p>Add notes on a ticket or “message the agent” (by adding a note)</p>	<p>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?”</p> <ol style="list-style-type: none"> 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.  <p>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.</p>
<p>View an attachment added by an agent, if applicable</p>	<ol style="list-style-type: none"> 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



The screenshot shows the 'Service Portal' login interface. At the top left is the SDCOE logo and the text 'Service Portal'. Below this is a login form with two input fields: 'User name' containing the placeholder '[Your email address]' and 'Password' containing seven asterisks. A blue 'Login' button is positioned to the right of the password field and is highlighted with a black border. At the bottom left of the form is a blue hyperlink that reads 'Use external login'.

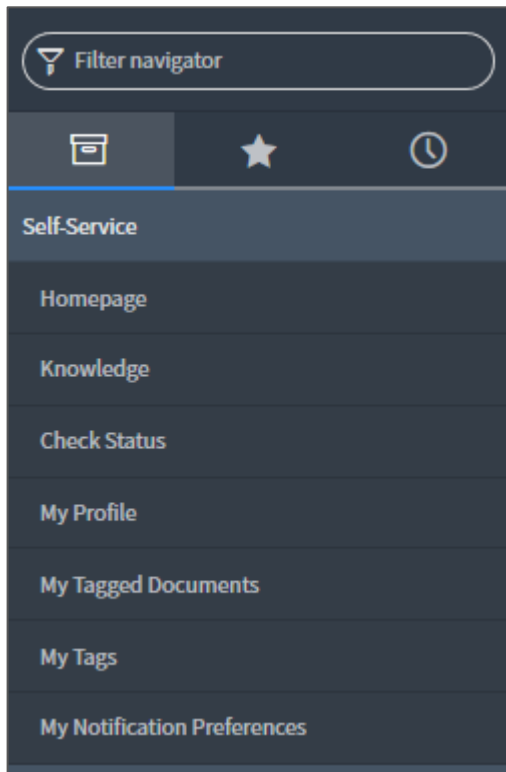
1. Go to <https://service.sdcoe.net>.
2. **User name** = Your email address. **Password** = _____
Please see your organization's Primary PeopleSoft Contact for assistance with your password.
3. Click **Login**.
4. **FIRST LOGIN:** You will be prompted to create a new password that meets the password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

Password Requirements

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

Navigation Bar

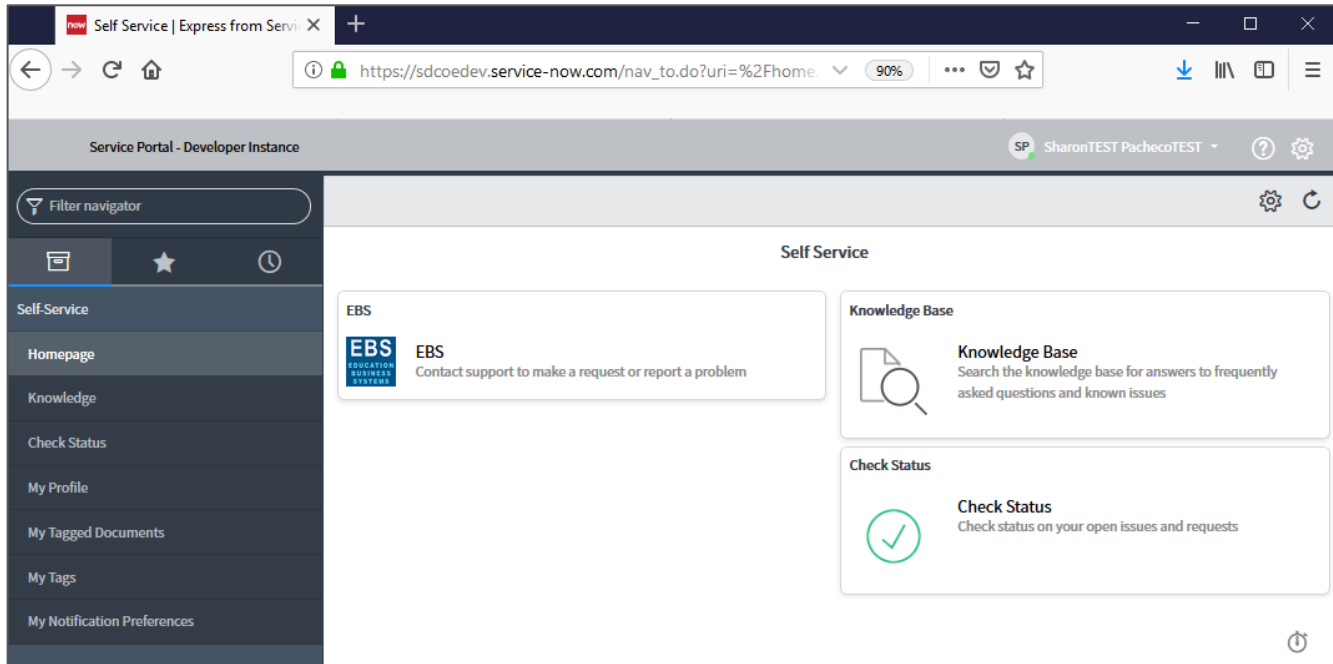
Get around the Service Portal using the **navigation bar (navbar)** on the left-side of the screen.



- 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:

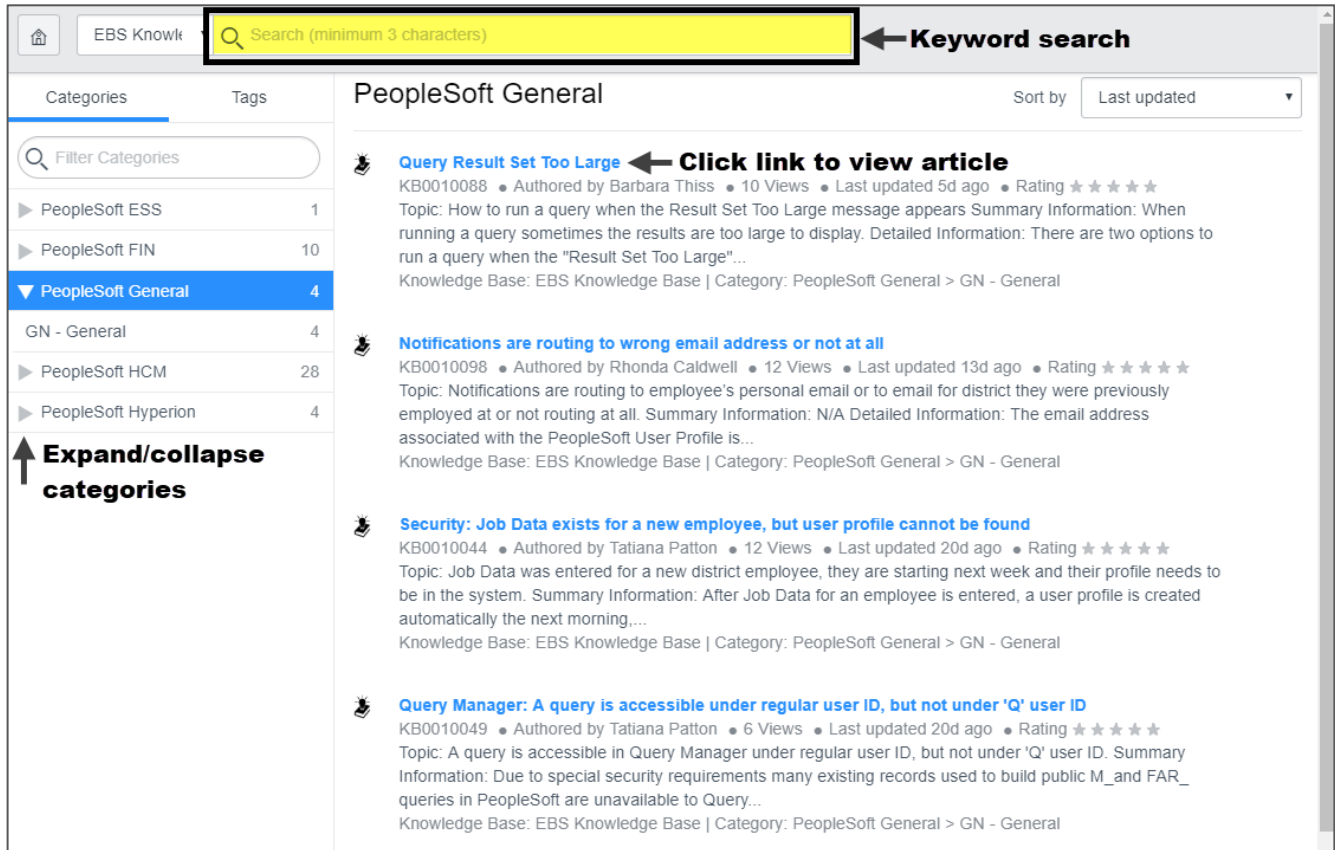
- **EBS Button (blue button)** = Enter a new ticket. Pick from **7 forms** in the Service Catalog.

Items
<input type="checkbox"/> "How To" Help How to use PeopleSoft to perform a task
<input type="checkbox"/> "Fix It" Help Data Fixes, Process not working, etc
<input type="checkbox"/> Requests Query/data requests, data uploads, Hyperion extracts, training requests
<input type="checkbox"/> Security Request Roles, Workflows, etc.
<input type="checkbox"/> Performance Issue Spinning, slowness, error messages
<input type="checkbox"/> Report an Outage System down
<input type="checkbox"/> Ask a General Question For non-PeopleSoft questions

- **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.



The screenshot shows the EBS Knowledgebase search interface. At the top, there is a search bar labeled "Search (minimum 3 characters)" with a magnifying glass icon, highlighted in yellow and labeled "Keyword search". Below the search bar, the interface is divided into a left sidebar and a main content area. The sidebar has two tabs: "Categories" and "Tags". Under "Categories", there is a search box labeled "Filter Categories" and a list of categories: "PeopleSoft ESS" (1), "PeopleSoft FIN" (10), "PeopleSoft General" (4), "GN - General" (4), "PeopleSoft HCM" (28), and "PeopleSoft Hyperion" (4). The "PeopleSoft General" category is selected and highlighted in blue. Below the list, there is an arrow pointing up and the text "Expand/collapse categories". The main content area is titled "PeopleSoft General" and has a "Sort by" dropdown menu set to "Last updated". It displays a list of articles. The first article is titled "Query Result Set Too Large" and is highlighted with a blue box and an arrow pointing to the text "Click link to view article". The article details include: "KB0010088 • Authored by Barbara Thiss • 10 Views • Last updated 5d ago • Rating ★★★★★". The topic is "How to run a query when the Result Set Too Large message appears". The summary information is "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'...". The knowledge base is "EBS Knowledge Base" and the category is "PeopleSoft General > GN - General".

- 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 than *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?

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

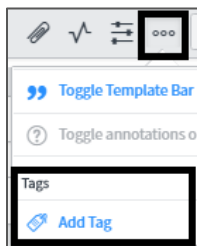
Check Status

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
<input type="checkbox"/>	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														
<input type="checkbox"/>	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.														
<input type="checkbox"/>	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														
<input type="checkbox"/>	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?														
<input type="checkbox"/>	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
<input type="checkbox"/>	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														
<input type="checkbox"/>	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:**

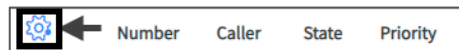
1. Get the details on the ticket
2. Message your agent and/or add notes on the ticket
3. Add an attachment to the ticket
4. Add a tag to the ticket (done from the 3 dots at the top of the screen)



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.”

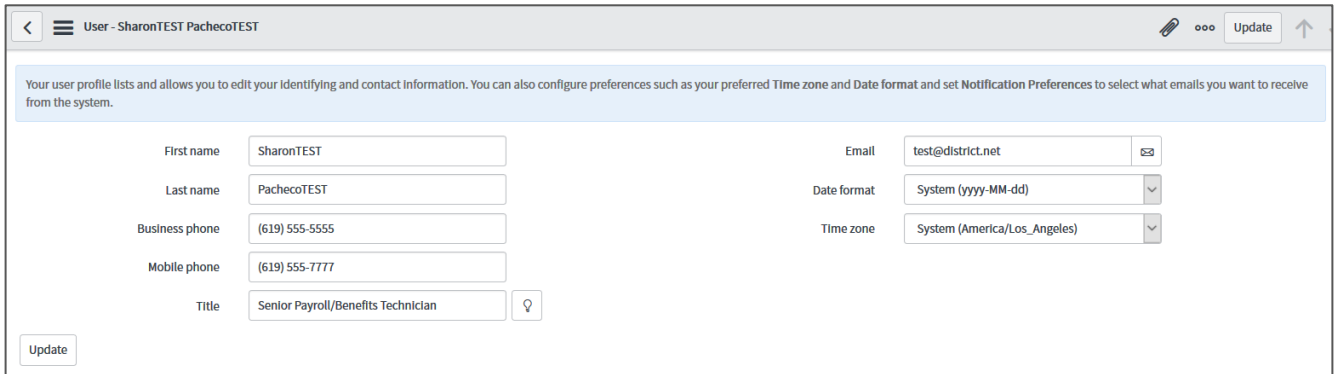


- **Export to Excel:** Click the 3 lines next to a field, like Number, and select Export.



My Profile

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



User - SharonTEST PachecoTEST

Your user profile lists and allows you to edit your identifying and contact information. You can also configure preferences such as your preferred Time zone and Date format and set Notification Preferences to select what emails you want to receive from the system.

First name	<input type="text" value="SharonTEST"/>	Email	<input type="text" value="test@district.net"/>
Last name	<input type="text" value="PachecoTEST"/>	Date format	<input type="text" value="System (yyyy-MM-dd)"/>
Business phone	<input type="text" value="(619) 555-5555"/>	Time zone	<input type="text" value="System (America/Los_Angeles)"/>
Mobile phone	<input type="text" value="(619) 555-7777"/>		
Title	<input type="text" value="Senior Payroll/Benefits Technician"/>		

Update

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**.

Tags	Go to	Order	Search							
Name	Active	Background color	Color	Global	Home page	Icon	Max entries	Navigation	Order	Owner
<input type="checkbox"/> managers	true			false	false		20	true		SharonTEST PachecoTEST
<input type="checkbox"/> Most Recent	true			false	false		20	false		SharonTEST PachecoTEST
<input type="checkbox"/> future	true			false	false		20	true		SharonTEST PachecoTEST
<input type="checkbox"/> Most Active	true			false	false		20	false		SharonTEST PachecoTEST
<input type="checkbox"/> 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.

Tagged Documents

- Most Recent 12
- business process 1
- managers 1
- future 1

Incident - INC0015743 ✕

How do I set my "out of office" for PeopleSoft?

Number **INC0015743**

Category **EBS**

Priority **4 - Low**

State **Waiting Customer**

Caller **SharonTEST PachecoTEST**

Assignment group **EBS Security**

Assigned to **Rhonda Caldwell**