SDCOE Service Portal: Getting Started Worksheet

Name _____ **Username/Password** _____

Use this worksheet to record notes as you get started with using the new SDCOE Service Portal at https://service.sdcoe.net.

Things You Can Do: https://service.sdcoe.net

- ☐ Search the knowledgebase
- ☐ Create a new ticket
- ☐ Add an attachment to a ticket
- ☐ Check the status of a ticket
- ☐ Add notes on a ticket or "message the agent" with a note

- ☐ Close a ticket (after Agent has marked Resolved)
- ☐ Resolve/Close a ticket (before Agent has marked Resolved)
- ☐ Reopen a closed ticket
- ☐ Other _____
- ☐ Other _____

What I Like 😊

What I Don't Like ☹

Specific Problems I Encountered

My Questions/Comments

Is the Service Portal easy to use? Why or why not?

Overall Rating Please compare the Service Portal to HEAT and give scores from 1-10, where 10 is the highest.

HEAT Rating: I give HEAT a _____ because _____
_____

ServiceNow Rating: I give ServiceNow a _____ because _____
_____

SDCOE SERVICE PORTAL DIRECTIONS

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Login	**NOTE: The optimal browsers are Chrome and Firefox.** 1. Go to https://service.sdcoe.net 2. Username = 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** (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.

https://service.sdcoe.net