

Purpose: To provide an overview of the ServiceLink Portal and submitting and tracking tickets.

Intended Audience: ServiceLink Portal users.

Accessing the ServiceLink Portal

To create, access and track support tickets, use the ServiceLink Portal. The Portal is located at the following address: https://ucrsupport.service-now.com/ucr_portal/.

To use the Portal to create and track tickets, login using the link in the top right of the screen:



Note: A UCR NetID and Password are required to login.

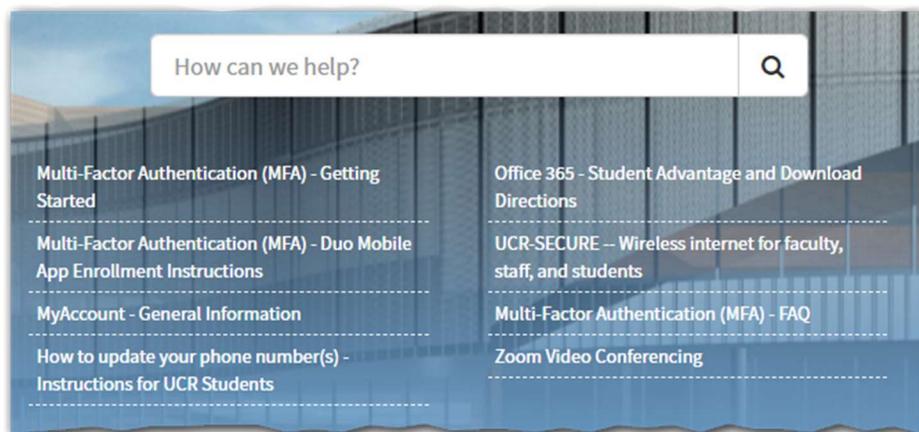
The ServiceLink Homepage

The ServiceLink homepage has a menu that allows for the submission and tracking of support tickets. In addition, the page provides access to Knowledge articles that provide information on numerous topics.



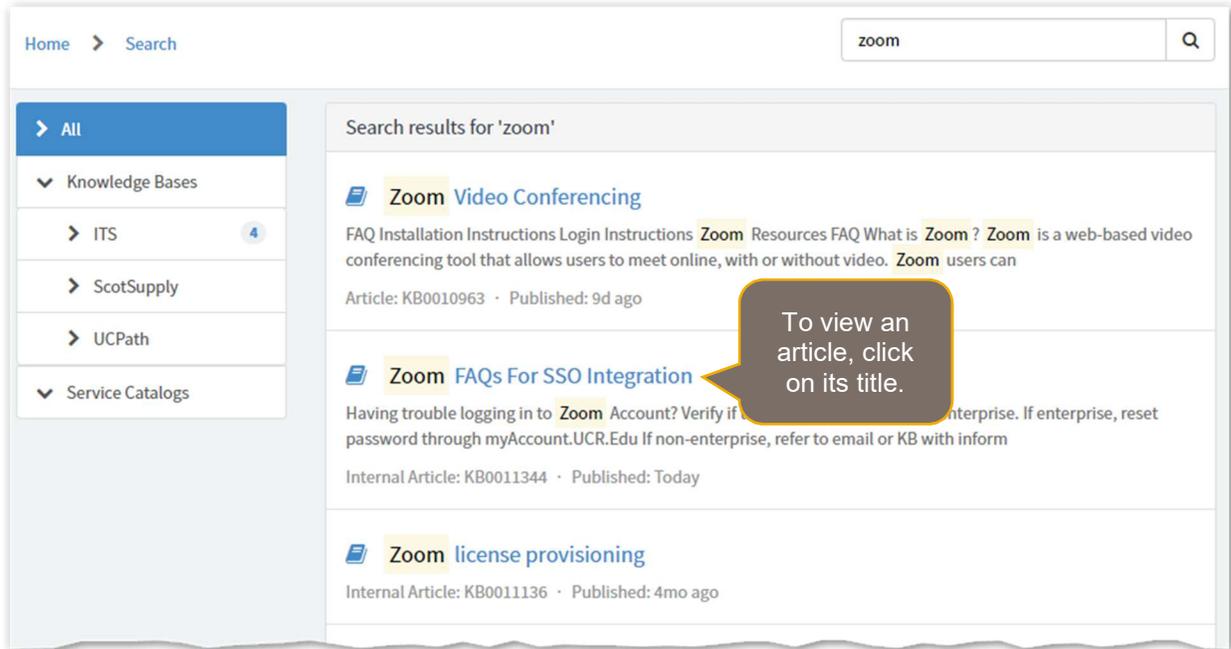
In addition to the menu, the body of the homepage provides a search field that allows for the searching of Knowledge articles.

Below the search field are the top articles currently being viewed by other users.



Note: Clicking the **Browse Knowledge** link on the menu provides the same functionality as the search field on the homepage.

Entering a search term will return all relevant articles pertaining to that search:



The bottom of the homepage has a series of useful links.

The Information Technology box is for general campus use.

 <p>Information Technology</p> <ul style="list-style-type: none"> Submit Support Ticket Make a Request Faculty/Staff Password Reset Student Password Reset Software Downloads IT Tutorials IT Policies & Standards 	 <p>Human Resources & Academic Personnel</p> <ul style="list-style-type: none"> Onboarding - New Hire Update Position Offboarding Extended Leave Administration Job and Comp Data Changes More Services 	 <p>Finance</p> <ul style="list-style-type: none"> FAU Change Request Salary Cost Transfer Request And more!
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The links in the Human Resources & Academic Personnel and Finance boxes only pertain to specific roles.

Submitting Tickets

There are two types of ticket that can be submitted: a **Request** and a **Support Ticket**.

The links to submit tickets can be found in the menu at the top of the ServiceLink homepage.




Make a request is to be used when asking for new items or services. Examples include asking for additional licenses to software, requesting that CAS is used for a website, or requesting graphic design.

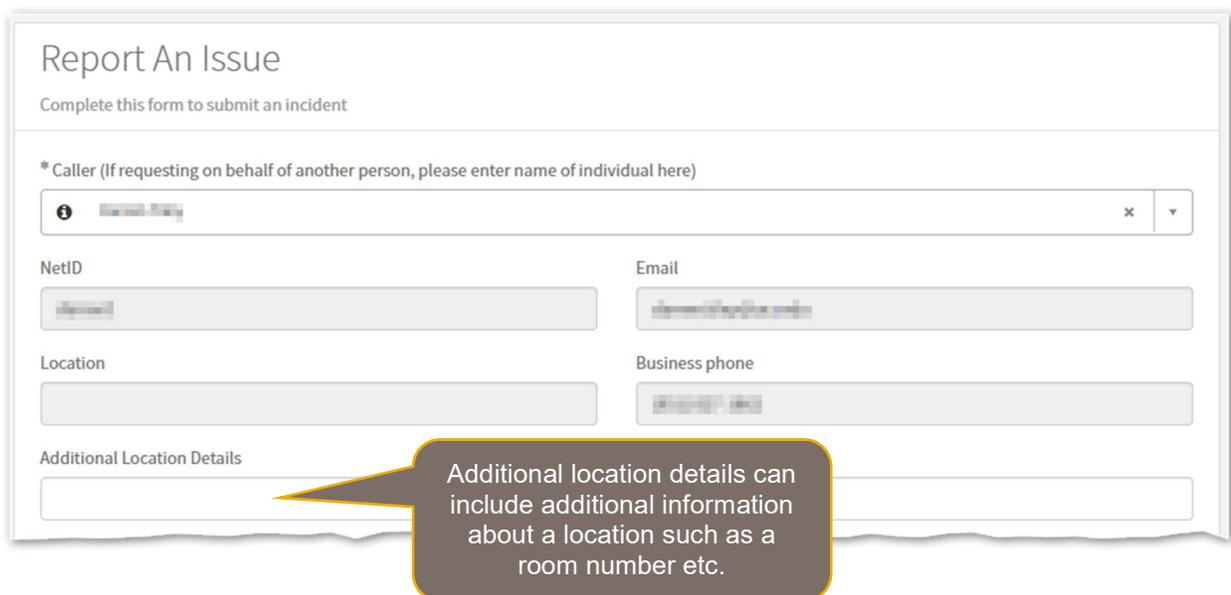
Submit Support Ticket is used when an issue needs to be reported. Examples include broken hardware such as a broken monitor, or some kind of system outage.

Note: Support tickets are also referred to as Incidents.

Submitting a Support Ticket

Clicking **Submit Support Ticket** will open the Report an Issue form. This form is standard for reporting any type of issue that may be experienced.

The top of the form automatically populates the submitters contact information. A ticket can be submitted on the behalf of another user by changing the name in the **Caller** field. If this is done, that person will become the primary contact for the ticket.



Report An Issue
Complete this form to submit an incident

* Caller (If requesting on behalf of another person, please enter name of individual here)

NetID

Email

Location

Business phone

Additional Location Details

Additional location details can include additional information about a location such as a room number etc.

Below the location details, there are three mandatory fields **Category**, **Subcategory** and **Short Description**:

*** Category**
-- None --

*** Subcategory**
-- None --

*** Short Description**
This field is limited to 200 Characters

Category allows for the ticket to be routed appropriately by ITS. The category that most reflects the issue should be selected.

Subcategory allows for further defining of the issue. The selections that appear in this dropdown are dependent on the Category selection made.

Short Description allows for the provision of a brief description of the issue being experienced.

The bottom of the form allows for the provision of more information and to add any necessary attachments:

More Information

In order to expedite resolution, Please include in the short description

1. Are others in the team facing the same issue and include contact information
2. Any error code or id's affected
3. What application/tool/service did you experience this error (Please include any URL)
4. Steps to reproduce issue
5. Attach any error screen captures or documents
6. Is this first time you experienced this issue
7. What operating System and Browser is being used

Description

The **Description** field is available to provide more information. There are suggestions above that indicate the type of information that should be provided in the Short Description and Description fields.

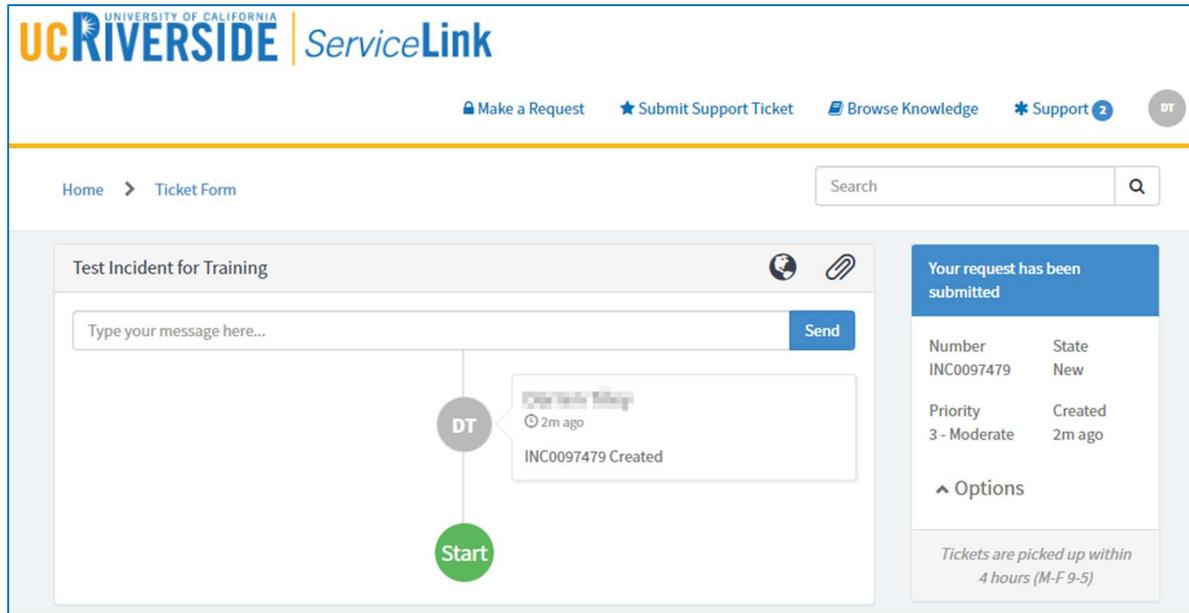
Shows mandatory fields that are yet to be completed.

Submit

Click to add an attachment.

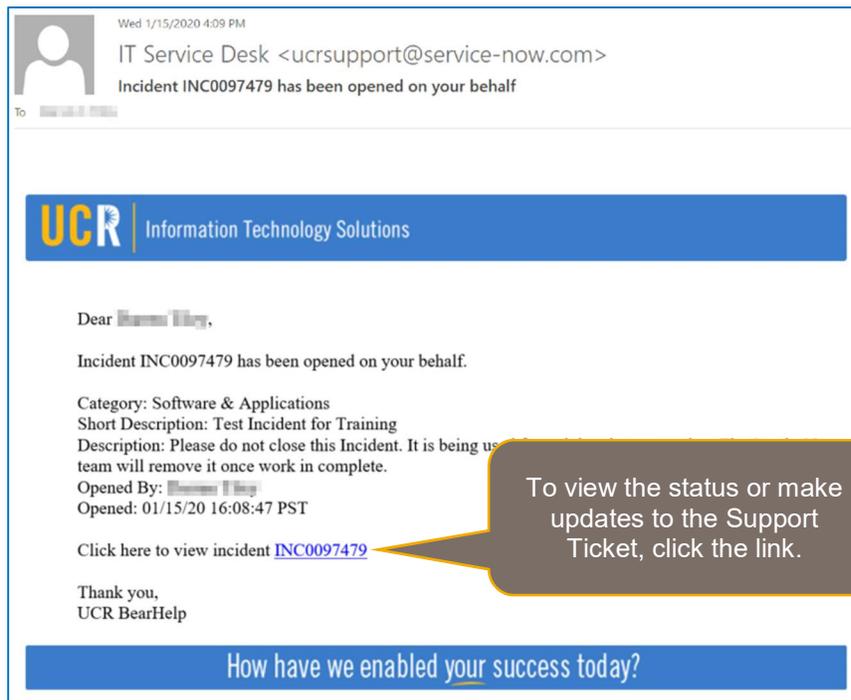
Add attachments

Once a Support Ticket is submitted, the Support Ticket Details screen will be displayed:



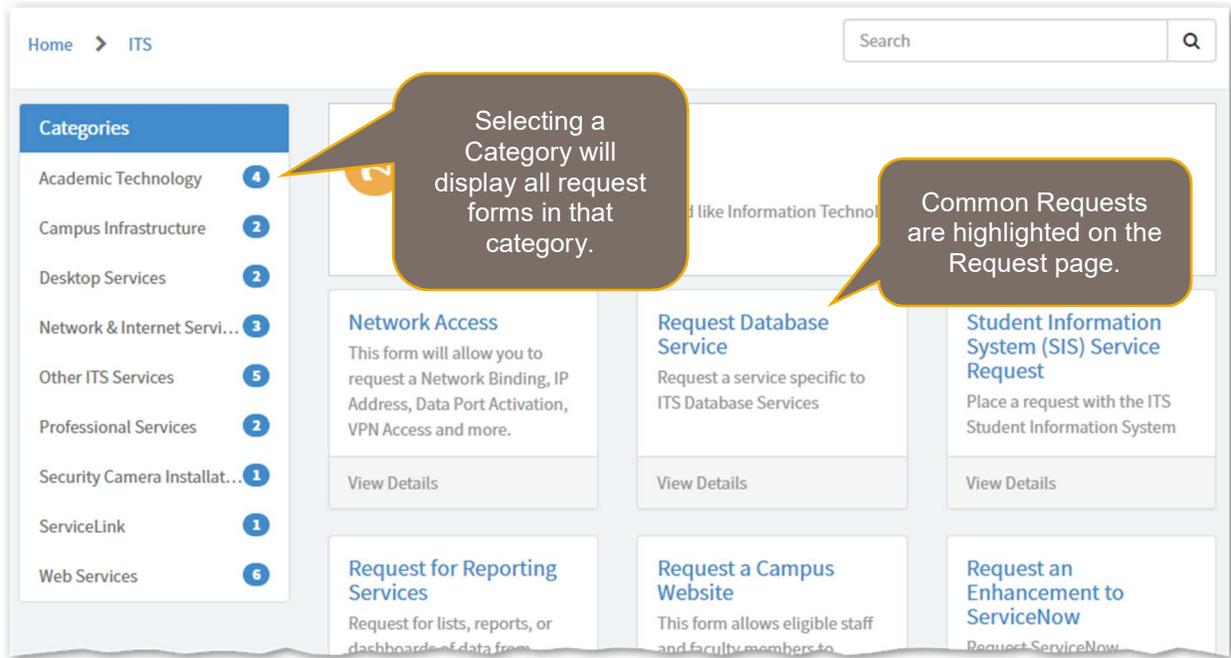
Note: The Tracking Tickets section of this document will look at the functionality of the Ticket Details screen.

An email will also be received with the details of the submitted Support Ticket:

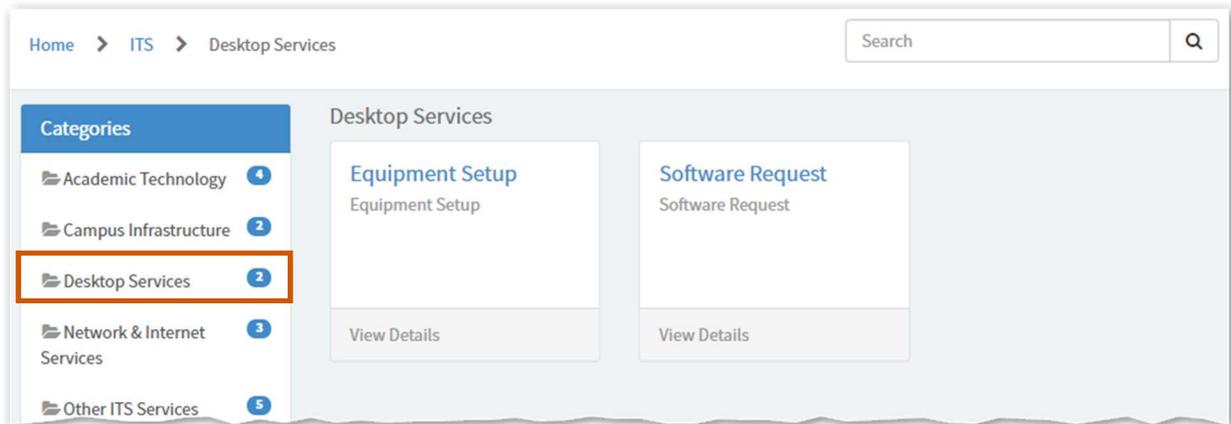


Making a Request

Clicking **Make a Request** from the menu opens the Request page. Unlike Support Tickets, there are multiple Request forms. All forms are available from the Request page:



If a request category is selected, the Request forms in that category will be shown:



Once a particular request has been selected, the appropriate form will be opened. Request forms are similar to the Support Ticket form described earlier in this document:

Software Request

Software Request

* Requestor (If requesting on behalf of another user)

NetID

Email Business phone

* Which Software

-- None --

Additional Information

Required information **Which Software**

Add attachments

Note: The fields on Request forms will differ depending on the exact form selected.

Once a Request is submitted, the Request Details screen will open:

The screenshot shows the ServiceLink portal interface. At the top, there are navigation links: "Make a Request", "Submit Support Ticket", "Browse Knowledge", and "Support" with a notification badge. The breadcrumb trail shows "Home > Request". A search bar is located on the right. The main content area displays the request title "REQ0093364 - Software Request" and a message input field with a "Send" button. A timeline shows a "Start" button and a "DT" (Tracking Ticket) icon. A message box indicates "REQ0093364 Created" with a timestamp of "just now". On the right, the "Requested Items" section shows "Software Request RITM0107346" with a status of "Request Approved (Approved)". Below this, it indicates "Fulfillment Waiting for Catalog Task: Source Licensing (In progress)" and "Completed (Pending - has not started)". An "Attachments" section is also visible with a "Drop files here" prompt.

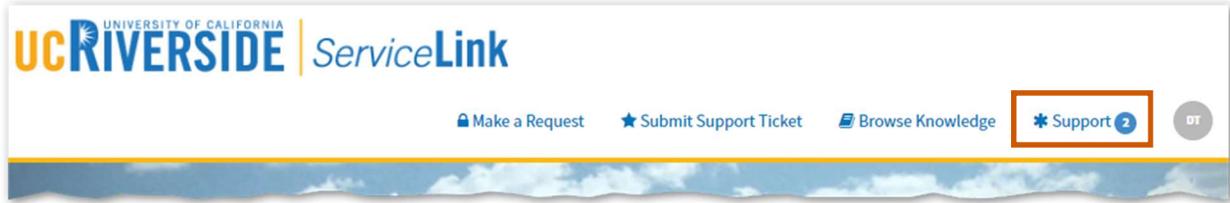
Note: The Tracking Tickets section of this document will look at the functionality of the Request Details screen.

An email will also be received containing the details of the Request:

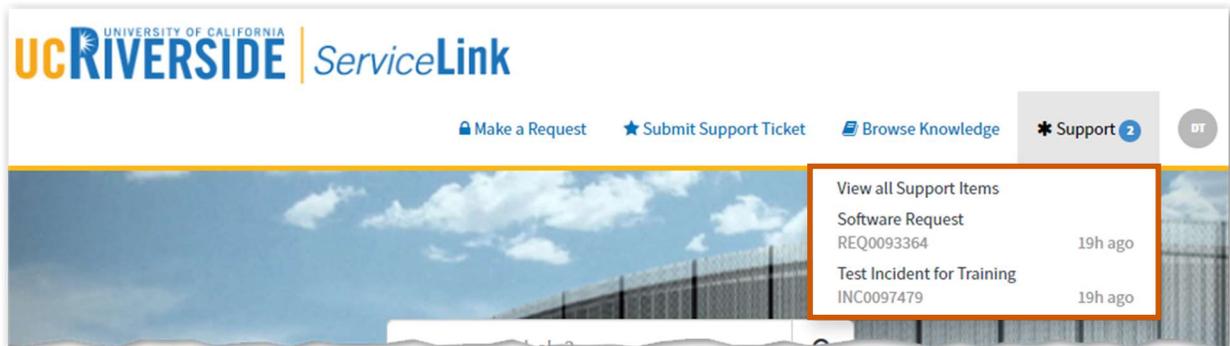
The email notification is from the IT Service Desk, dated Wednesday, 1/15/2020 at 4:21 PM. The subject is "Request RITM0107346 has been opened on your behalf". The email body includes the UCR Information Technology Solutions logo and a greeting "Dear [Name]". It states: "Requested Item RITM0107346 has been opened." It provides the opening and due dates: "Opened: 01/15/20 16:20:56 PST" and "Due date: 01/16/20 06:20:56 PST". It also lists the item details: "Requested Item: Software Request" and "State: Open". A link is provided to view the requested item: "Click here to view Requested Item: [RITM0107346](#)". The email concludes with "Thank you, Information Technology Solutions" and a footer banner that reads "How have we enabled your success today?". A callout box points to the link with the text: "To view the status of the Request, click the link."

Tracking Tickets

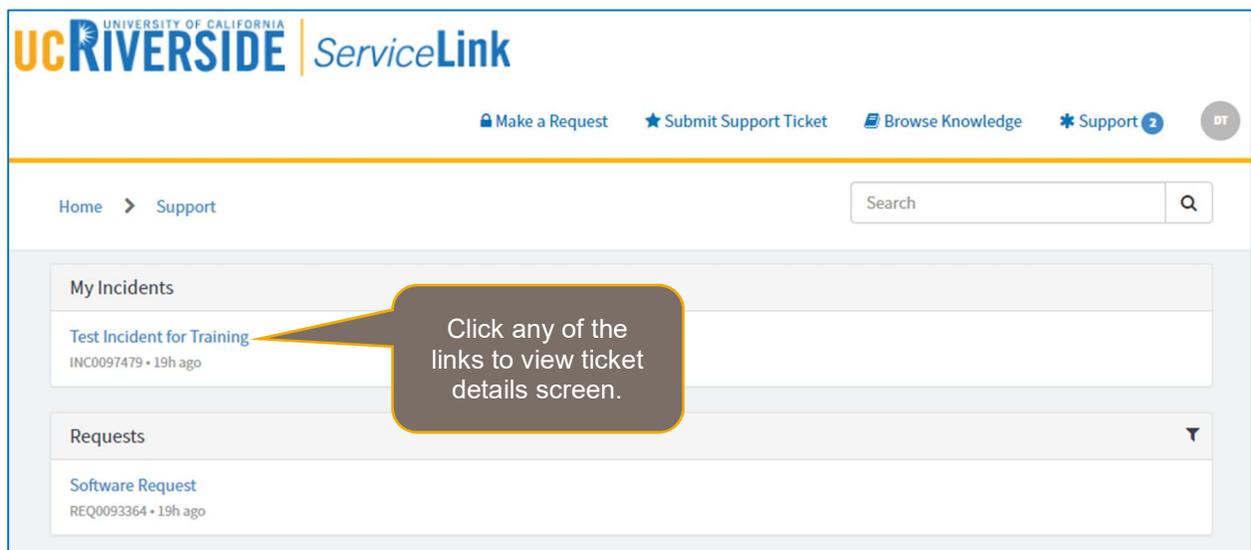
As previously mentioned, tickets can be accessed via the email received upon submission. They can also be accessed at any time using the **Support** menu on the ServiceLink homepage:



Clicking the **Support** menu will allow for the viewing of all tickets, or click to view a specific ticket:

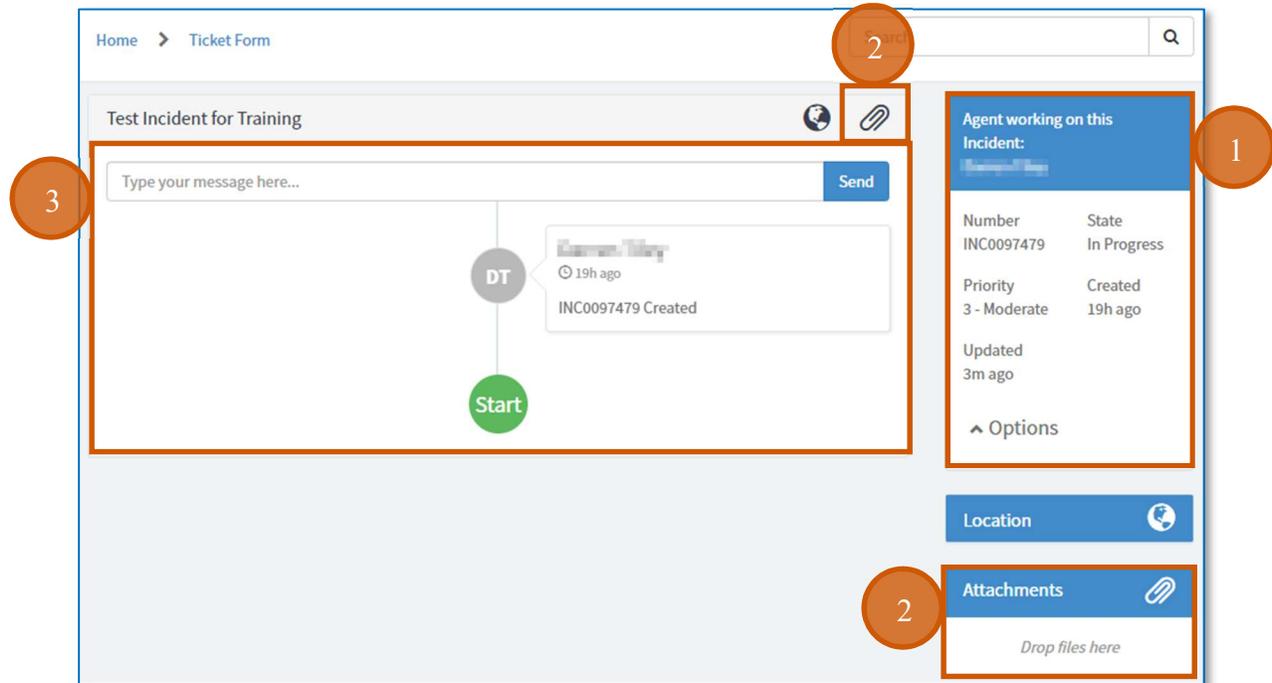


If **View all Support Items** is clicked, all tickets will be displayed categorized as either Incidents (Support Tickets) or Requests:



The Incident (Support Ticket) Details Screen

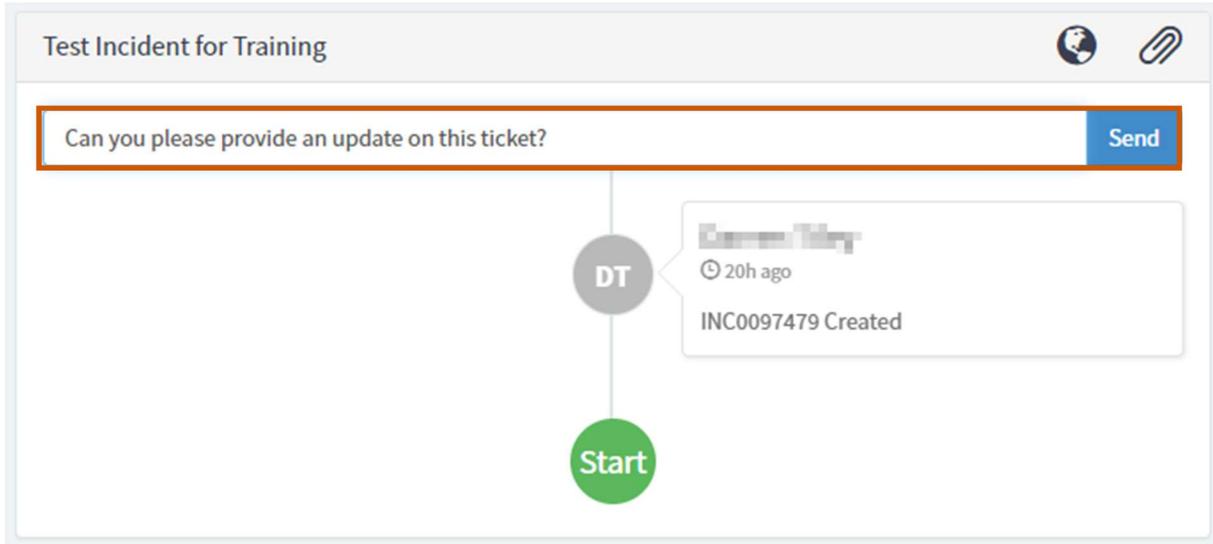
Clicking an Incident title from the Support menu in ServiceLink will open the Incident Details Screen:



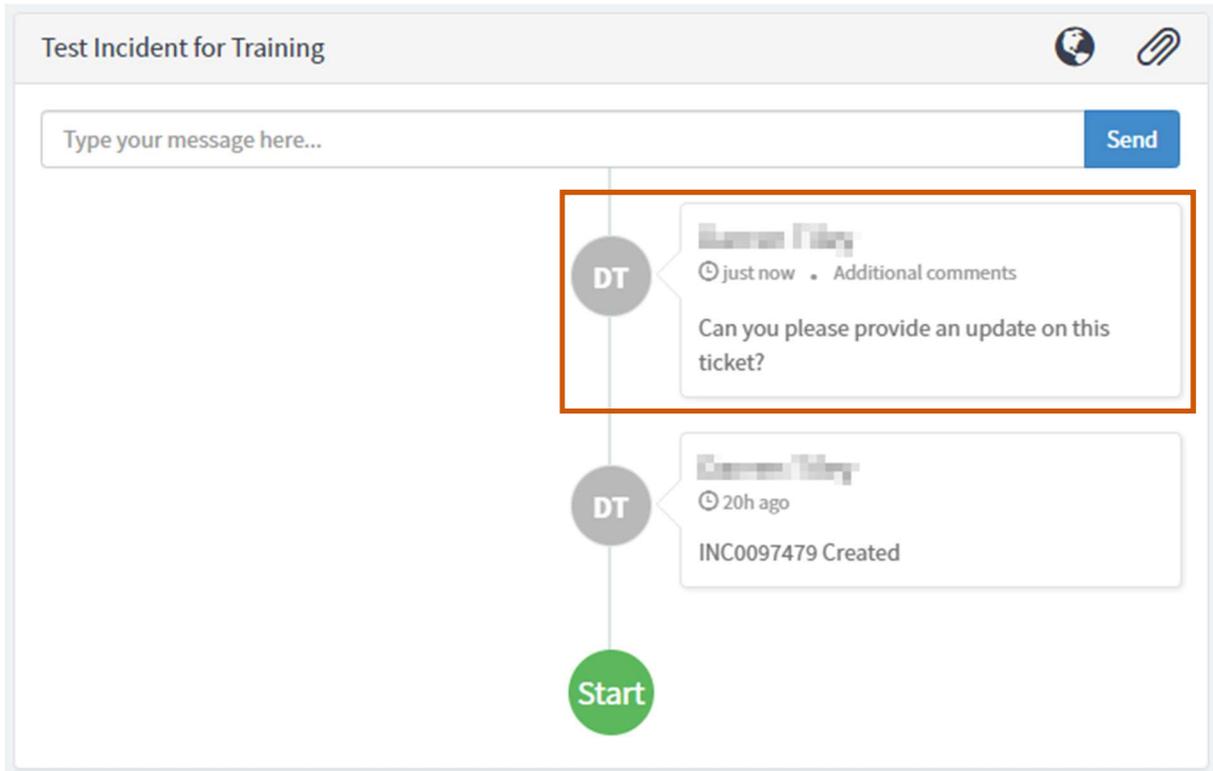
1. The right panel shows the following information:
 - a. The person working on the Incident.
 - b. The Incident number (this can be referenced if calling in about the Incident)
 - c. The Incident State:
 - i. **New** - The Incident has been logged but not yet assigned
 - ii. **In Progress** – The Incident is assigned and being worked on
 - iii. **On Hold** – ITS is unable to work on the Incident. This happens when waiting for caller input, awaiting a system change or waiting for a vendor. In any instance the caller will be informed of the status change
 - iv. **Resolved** – Work has been completed. An email is received by the customer when State is set to resolved
 - v. **Canceled** – Used if the Incident was found to be a duplicate or unnecessary Incident. The customer would be informed of the status change
 - d. The Priority (this is initially defined based on Category, but can be changed accordingly by ITS).
 - e. When the Incident was created.
 - f. When it was last updated.
 - g. Clicking the Options link will provide further detail about the Incident such as the Category, Subcategory, Short Description and Description. These values are either defined when the Incident is submitted, or populated by a support team member if they created the ticket on a user's behalf.
2. Attachments can be added to the Incident from the Incident Details screen.
3. The main panel of the Incident displays any communication that has taken place on the Support Ticket. If a communication is sent, an email will also be received. Users also have the ability to send a message from this panel.

Sending a Message via the Incident (Support Ticket) Details Screen

Typing a message and clicking **Send** will alert the ITS ticket owner that a comment has been added:



The note will also be appended to the timeline of the ticket:



When the ITS ticket owner replies, it will also show in the ticket timeline:

The screenshot shows a ticket titled "Test Incident for Training" with a message input field and a "Send" button. The timeline consists of four items:

- DT** (just now): A comment from "Dennis Wiley" stating, "We are currently working on a solution to this issue and will have an update for you by the end of the day tomorrow." This comment is highlighted with a red box.
- DT** (4m ago): A comment from "Dennis Wiley" asking, "Can you please provide an update on this ticket?"
- DT** (20h ago): A system message: "INC0097479 Created".
- Start** (green circle): The beginning of the ticket.

In addition, an email notification is sent that contains the comment:

The email notification is from "IT Service Desk <ucrsupport@service-now.com>" and is titled "Your Incident INC0097479 has comments added". It includes the UCR Information Technology Solutions logo and the following content:

INC0097479 - Test Incident for Training

Comments:

01/16/20 11:49:39 PST - Dennis Wiley Additional comments
 We are currently working on a solution to this issue and will have an update for you by the end of the day tomorrow.

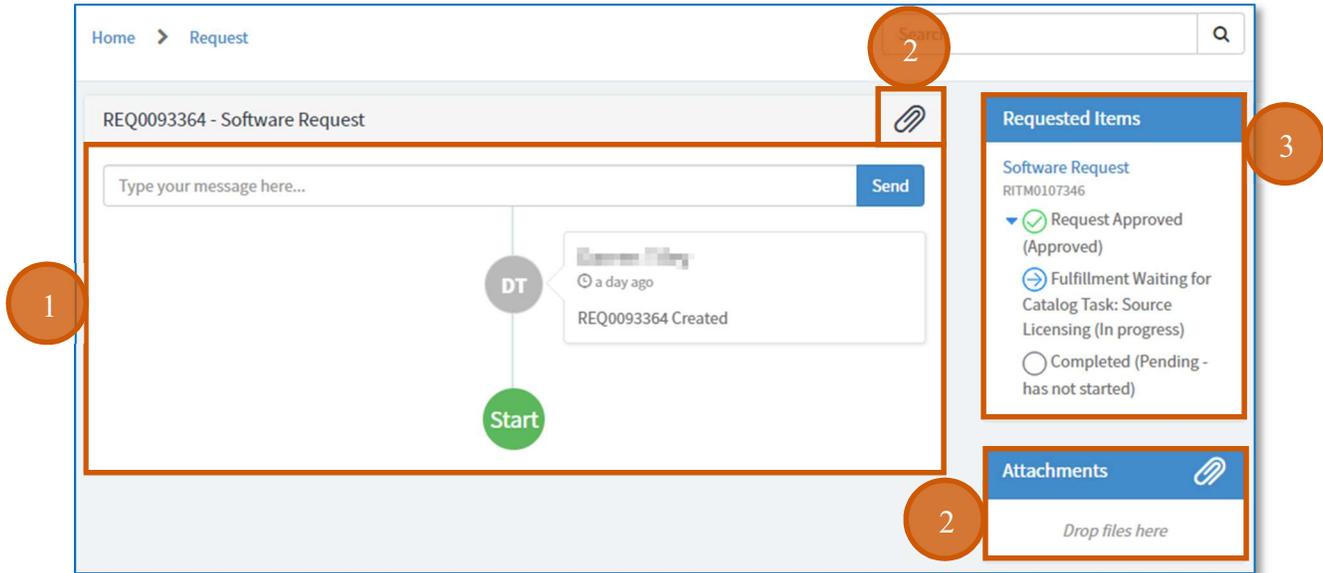
Click here to view incident [INC0097479](#)

A callout box points to the link with the text: "To view the ticket, click the link".

Note: Replying directly to the email will automatically update the ticket and alert the ticket owner.

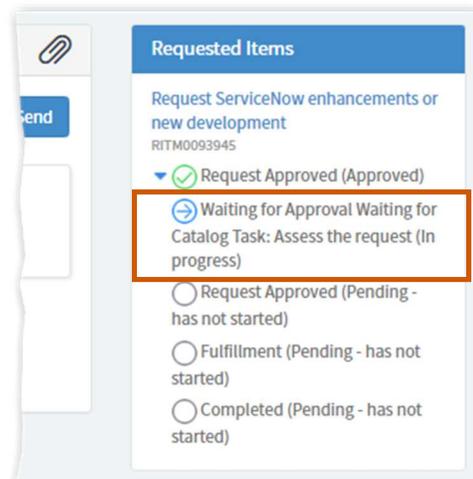
The Request Details Screen

Clicking a Request title from the Support menu in ServiceLink will open the details screen for that Request:

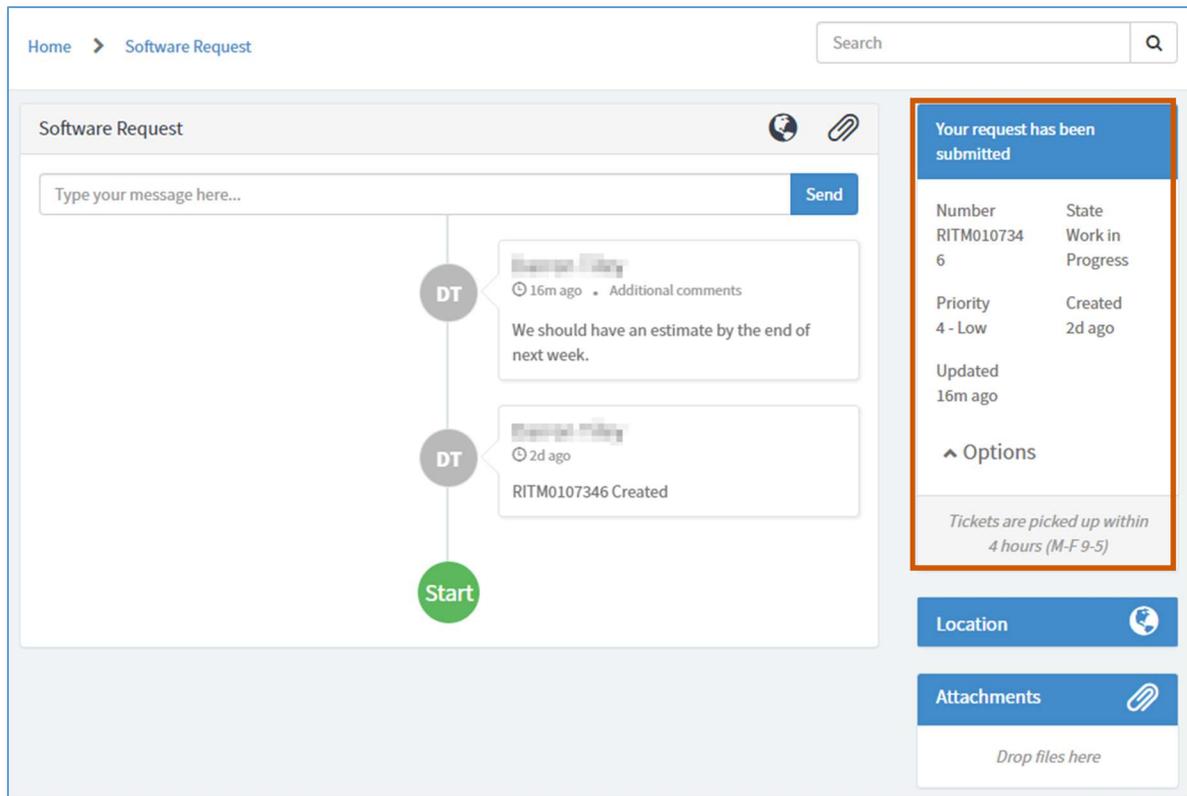


1. As with a Support Ticket, adding and tracking communications pertaining to a Request can be accomplished on the Request Details screen.
2. Attachments can also be added to the Request.
3. The right panel for a Request works slightly differently to a Support Ticket. The Requested Items panel displays which stage of its workflow the Request is in. This will differ based on the type of Request submitted. To see the details of the Request, click the link at the top of the Requested Items panel.

Note: The initial Request Approved stage means that the ticket was submitted successfully and has been entered into the system. If any additional approval is required for work to begin on the Request, there will be a second stage called Waiting for Approval.



Clicking the link in the Requested Items panel provides additional information:



Home > Software Request

Search

Software Request

Type your message here... [Send](#)

DT 16m ago · Additional comments
We should have an estimate by the end of next week.

DT 2d ago
RITM0107346 Created

Start

Your request has been submitted

Number	State
RITM0107346	Work in Progress
Priority	Created
4 - Low	2d ago
Updated	
16m ago	

Options

Tickets are picked up within 4 hours (M-F 9-5)

Location

Attachments

Drop files here

1. The Request State:
 - a. **Open:** Request has been opened and is awaiting approval / assignment.
 - b. **Pending:** Request is approved and work has not yet started.
 - c. **Work in Progress:** Request is approved and is being worked on.
 - d. **Closed:** Request has been closed. When a Request is closed, the customer is informed.
2. Priority: Determined by the Request type.
3. Created: When the Request was created.
4. Updated: When the Request was last updated.
5. Clicking the Options link will provide further details about the Request.