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/](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:

![Login to ServiceLink Portal](https://example.com/login.png)

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.

![ServiceLink Homepage](https://example.com/homepage.png)

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.

The links in the Human Resources & Academic Personnel and Finance boxes only pertain to specific roles.
Submitting and Tracking Tickets on the ServiceLink Portal

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.

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** 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:

- **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.

- Click to add an attachment.
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:

To view the status or make updates to the Support Ticket, click the link.
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:

As with an Incident, a Request can be submitted for another user.

**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:

![Request Details Screen](image)

**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:

![Email Details](image)

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:

Click any of the links to view ticket details screen.
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:

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

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:

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.