Portal Employee Guide
This document is for the above portal user.

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Self Service Portal

The Self Service Portal is the customer focused portal where clients can report an issue, submit a request, and view the current status of previously submitted tickets. Access to the Self Service Portal requires Passport York login credential or if one does not have a Passport York login account, client can use the ‘I Don’t Have an Account’.

Figure 1. Main Portal Page

Portal Users

Students
Students can submit tickets through the Portal. Once logged in, the student will be able to report an issue, make a request, and view the current status of previously submitted tickets.

Employees
Employees can submit tickets through the Portal. Once logged in, the employee will be able to report an issue, make a request, submit a ticket ‘On behalf of someone’ and view the current status of previously submitted ticket.
Anonymous

Anonymous users can submit a request and/or report an issue through the Portal, but cannot view the progress of their ticket.

Logging in to the Portal
Access to the Portal requires Passport York log in credentials (for Employees and Students only).
1. Click on I am a Student or I am an Employee

![Figure 4. IT Main – Login Page](image)

2. You will be prompted a login screen as shown below

![Cherwell Service Management](image)

3. Enter your Passport York username and Password

4. Click on the Sign-In button
5. Once logged in you will be redirected to your respective page as shown below
How to submit an Issue

Report an Incident allows you to report an issue that you are experiencing such as:

- Unable to log in to Passport York system/SIS application/Moodle
- Unable to print
- Unable to send emails or experiencing an issue with your email
- Department printer is not working
- Unable to connect to the campus Wi-Fi, etc.
1. Click on **Report an Incident**

2. System will redirect you to the **Submittal form** as displayed

**Note:** Any field with the * is **mandatory**

3. [Optional] Add a preferred email and/or **contact number**

4. [Optional] Add a short **summary description** into the **Summary** field. This will be the ticket subject line
5. Under **Smart Search** enter the service name or product name you are experiencing an issue with.
   a. For instance, if you are experiencing an issue with **computer**, then you will enter **Computer** into the Smart Search field.

   ![Smart Search Example](image)

6. Once you enter the item name into the **Smart Search** field, press the **Tab** key from your keyboard.

   **Note:** You could also use the classification drop down in order to fill in the classification by selecting the item from the selection list on each category.

![Classification Drop Down Example](image)

7. Add a **meaningful description** into the **Description** field.
8. Click on the **Submit** button located at the top left hand side of the submittal form as shown below

![Submit and Abandon buttons](image)

### New Record Submittal (12910)

**Name:**

Scott Speedman

**Preferred Email (for this communication):**

scottspeedtest@gmail.com

**Preferred Phone and Ext. (for this communication):**

(905) 123-4567

**Location:**


**Summary:**

Computer - Audio issue

**Smart Search:**

[Clear Smart Search](#)

What are you having an issue with?

- **Computer**
- **Issue with hardware**
- **Specifically with...**
- **Audio**

**Details**


**Other Details**


**Description:**

*My computer audio is not working. Please assist. Thank you*
9. System will prompt you a **reference number**
10. Click the **OK** button

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**How to submit a Service Request/Inquiry**

**Report a Service** allows you to submit a Service Request/Inquiry such as items below via the **Service Catalog/Service Request Forms**:

- **A Lotus Notes** password reset
- **A Computer set up** request
- **Onboarding/Offboarding** request

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**Employee Computing**

Welcome to the Computing Portal. Corresponding with us through the portal enables you to report an issue request a service and view the status of a current or previously logged ticket. Click the appropriate button below to get started.

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**Figure 5. Employee page**
Submit a request via Service Catalog:

1. Click on Request a Service

2. System will redirect you to the Service Catalog page as shown below. Each Category has a short description and a sub-category lists which are displayed once you click on the category:

   Note: Use Account & Access for account setup, modify, deactivate or any change needed for computer resources and services i.e. Passport York, SIS, VPN, Maximo, eReports, etc. Anything that is account and/or access related. Use other categories that are list such as Administrative & Business, End Point Computing, Infrastructure, etc. for Support or Enhancement request types.

3. Click on the desired category [example: Accounts & Access] based on your request and select the service in Category 2 list

4. System will redirect you to the Submittal form as displayed with prepopulated fields
Note: Any field with the * is mandatory

5. [Optional] Add a preferred email and/or contact number
6. [Optional] Add a short summary description into the Summary field. This will the ticket subject line
7. Select a Date under Needed By date field [Optional]
8. Select an Action from the Operation Actions drop-down list
9. Select a service from the Service Detail (category 3)
10. Select a service from the Service Item (category 4)
11. Add a **meaningful description** into the **Description** field

12. Click on the **Submit** button located at the top left hand side of the submittal form

13. System will prompt you a reference number, press **OK**

14. You will be redirected back to the **Employee page**

15. If you are done, click on your **name** displayed at the top right corner and **Log out**

**Submit a request via Service Request Forms**

1. Click on **Service Request Forms**

2. System will redirect you to the service request forms page as shown below:

**Service Request Forms**

- **Accounts Setup**
  - Employee Offboarding
  - Employee Onboarding (new and transferring employee)
  - Guest/Non Employee
  - Temporary Account (TAM)

- **Email**
  - Listers/Creation

**Figure 7. List of Service Request Forms**

3. Select the **desired request** from the list

4. System will redirect you to the **Submittal form** as displayed below with prepopulated fields and the **service form** will show on the right hand side of the screen
5. Fill out the **additional required** * fields on the **service form**

6. **[Optional]**: You can add additional details info in to the **Description** field

7. Once all required fields are met, click on the **Submit** button located at the top left (if you cannot see the submit button scroll up inside the from screen)

8. System will prompt you a reference number, press **OK**

9. You will be redirected back to the **Employee page** as shown below
Adding Attachment

You can add an attachment to a request or an issue prior the submittal or after. Please note that once you upload/attach a file/image, you cannot view or delete the attachment.

Adding an attachment prior submittal

1. Click on the paperclip icon located at the mid area of the toolbar

2. Select Attach a file from drop-down list

3. System will prompt you an import file window
4. **Click to the green plus button.** You can leave the description field empty or add a description. **Note:** You can only add one attachment at a time.

5. **Browse to the location where the file is on your computer,** select the file and then click the **Open** button.

6. The attachment will appear in the **File Name** field. Add a description (optional), then click the **Save** button as shown below.
Adding Attachment after submittal

1. After you log on to the system, click on **My Tickets**

   ![Employee Computing](image)

   **Figure 9. Employee Page**

2. **Double click** on the desired ticket from the list

3. Click on **Edit**, click on **paperclip** icon located at the mid area of the toolbar
4. Select **Attach a file** from drop-down list

5. System will prompt you an import file window

6. Click on the **green plus** button. You can leave the description field empty or add a description. **Note:** You can only add one attachment at a time.

7. Browse to the location where the file is on your computer, select the file and then click **Open**

8. The attachment will appear in the **File Name** field

9. Add a description (optional), then click the **Save** button as shown above

10. If you are done, click on **your name** displayed at the top right corner and **Log out**
How to submit a request on Behalf of Someone

The system allows you to submit an inquiry/request on ‘behalf of someone’. For instance:

- A colleague requires a password reset or is having an issue with his/her computer
- A professor needs to order a classroom demo/equipment, etc.

Submit on Behalf of Someone

1. Click on Request a Service/Report an Issue
2. System will redirect you to the Submittal form
3. Remove your name from the Name field
4. Click on the Contact Manager button inside the Name field as shown below

New Record Submittal (10453)

Name: 

5. Enter client’s Name/Username/Employee number into the Search field and click on the Go button

Note: You can search client by username/employee/@yorku.ca email
6. Select the correct client from the search result list

7. System will automatically populate **customer’s name** into the **Name** field

8. Add a **meaningful description** into the **Description** field

9. Fill in all the **required** * fields

10. Click on the **Submit** button located at the top left hand side of the submittal form

11. System will prompt you a reference number, press **OK**

12. You will be redirected back to the **Employee page**

13. If you are done, click on **your name** displayed at the top right corner and **Log out**

**How to log out**

1. Click on **your name** displayed at the top right corner of the screen

2. Click on **Log out** to completely logout from the Portal