

### Overview

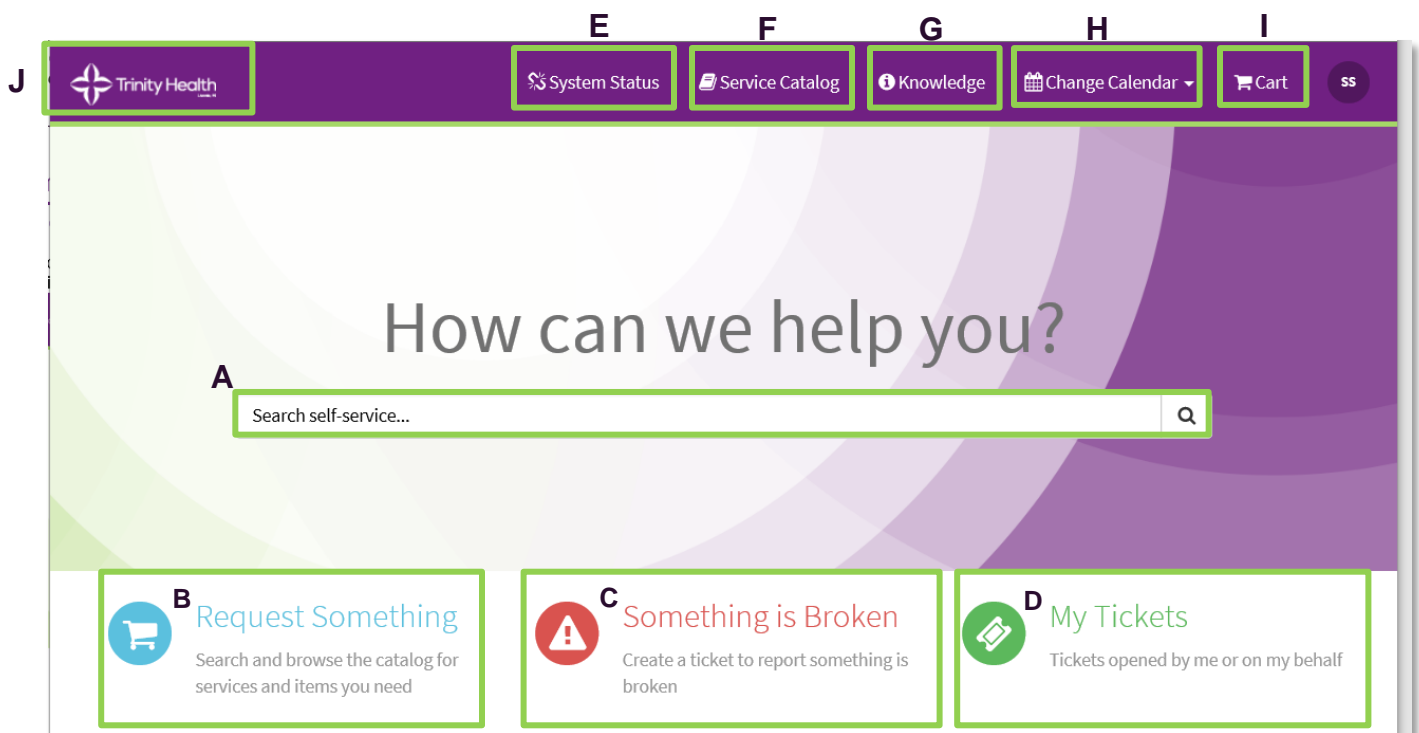
The purpose of this job aid is to navigate TIS Self-Service Portal. It will demonstrate how to search Self-Service content including Catalog Items and Knowledge Articles. It will also provide an overview of the home page and its components. This job aid assumes you know how to log into the Self-Service Portal, if not please refer to [Accessing the ITSM ServiceNow Self Service Portal](#) Job Aid.

### Home Page Overview

#### TIS Self-Service Portal

From the Self-Service Portal home page you will have the ability to:

- A. Search for Self-Service content
- B. Request Something – Search and browse the Service Catalog for services and items you need
- C. Report Something is Broken – Create a ticket to report something is broken
- D. My Tickets - Check the status of tickets opened by me or on my behalf
- E. System Status – View the Unscheduled Downtime/Disruption Dashboard for current outages
- F. Service Catalog - Search and browse the Service Catalog for services and items you need
- G. Knowledge – Search the Knowledge Base for Self-Service content
- H. Change Calendar - View the scheduled system Change Requests
- I. Cart – Review the items in your cart
- J. Link to the Self-Service Portal home page



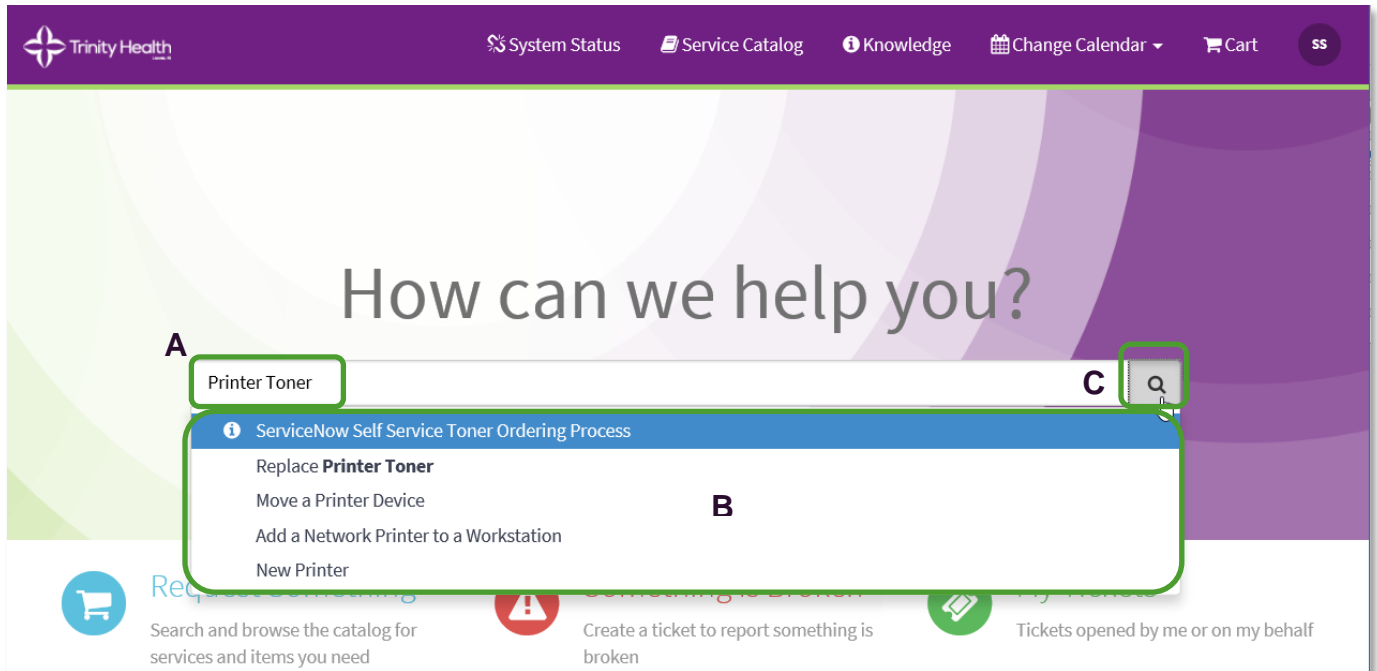
## Searching Self-Service

### Self-Service Portal Home Page

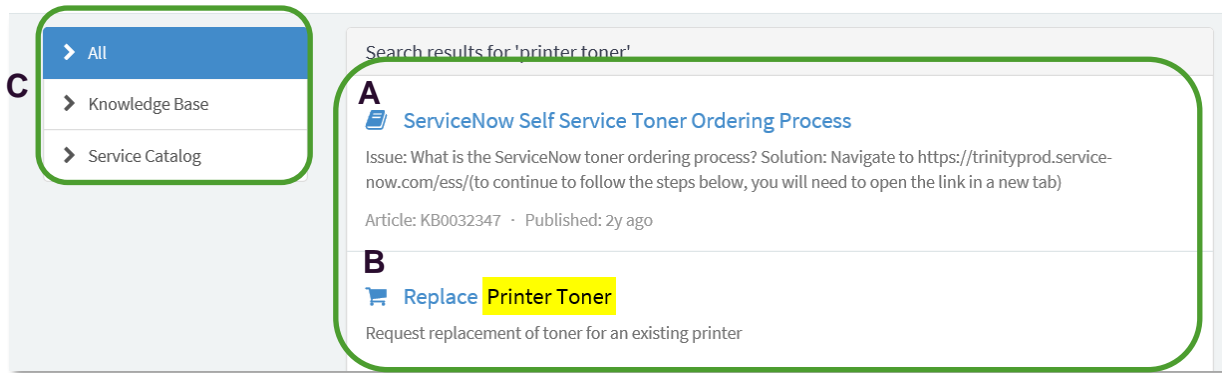
The search option will return Catalog Item and Knowledge Article results.

### Searching for a Catalog Item

1. Click the **search** box and begin typing. For training purposes, type **Printer Toner (A)**, the type ahead search results will display **(B)**.
2. Press **enter** or click the **magnifying glass (C)**.



3. The search results will display. View the results and choose a Catalog Item based on your need:
  - A. The results with the **book icon** are Knowledge Articles that contain information on the search terms, this could be on how to resolve your issue or information on the process to request something.
  - B. The results with the **cart icon** are Catalog items, they will open the form to submit your information.
  - C. Results may be filtered based on type. All will display both Knowledge and Service Catalog items, Knowledge Base will only display Knowledge Articles, and Service Catalog will only display Catalog items.



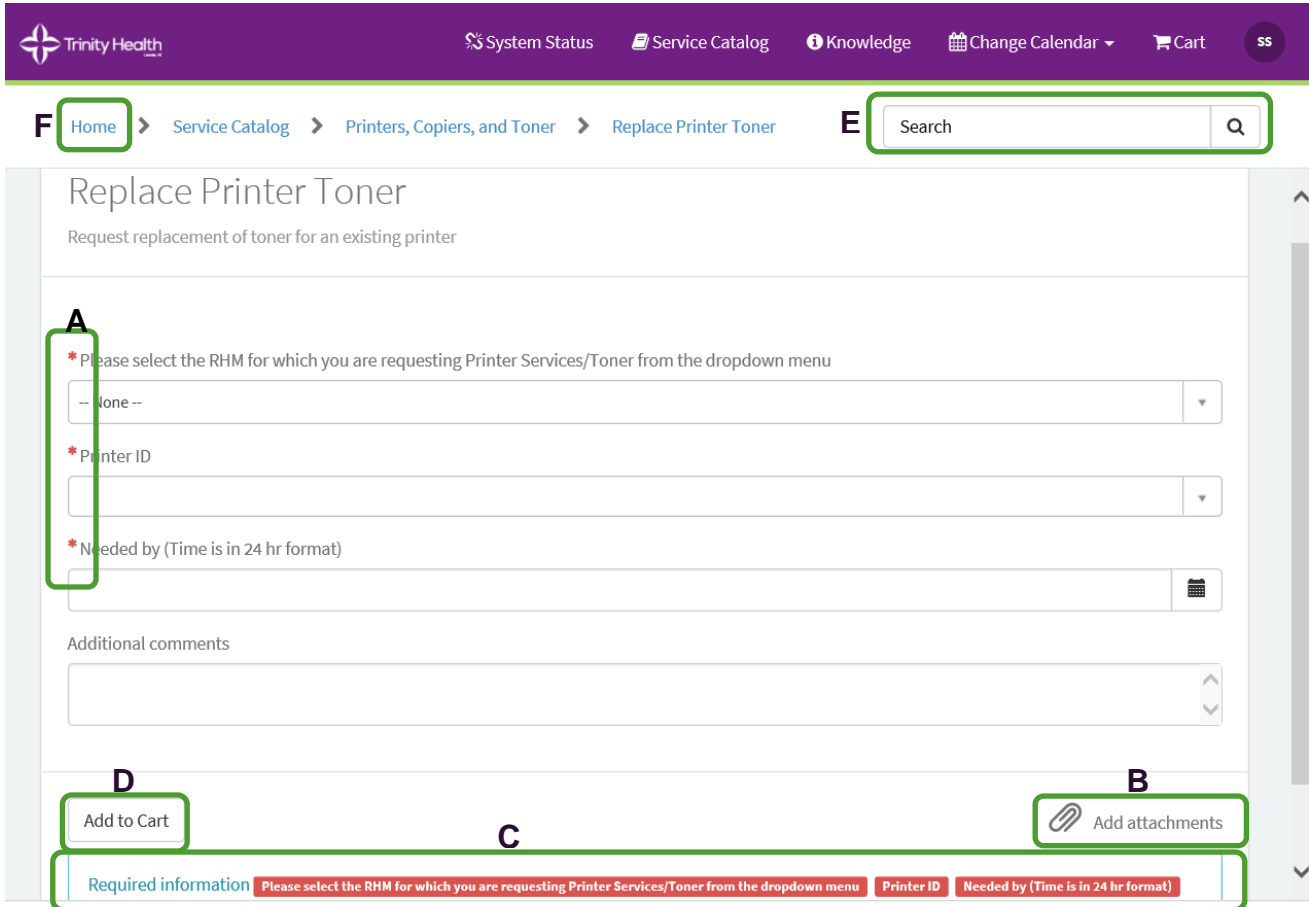
## Completing the Service Request

### Catalog Item Form

Each Catalog Item has a different form. The form will gather the information required to fulfill the Request or resolve the Incident.

### The Catalog Item Form

1. For the purpose of this Job Aid **Replace Printer Toner** has been selected
2. Click each field and complete the information requested. If the field has a drop down, it will display when you click the field.
3. Click **Add to Cart** when the form is complete, you will receive a message the item has been added to your cart.
  - A. Required fields will have a **red \*** in front of the field.
  - B. Click the paper clip to add an attachment
  - C. Required information to complete the form
  - D. Click Add to Cart when the form is complete
  - E. If you opened the incorrect form you can begin the Search again
  - F. To return to the Service Catalog Home Page



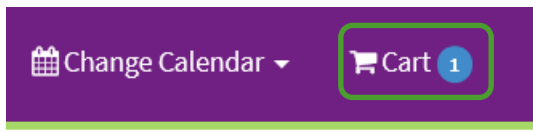
## Checkout

### TIS Self-Service Portal

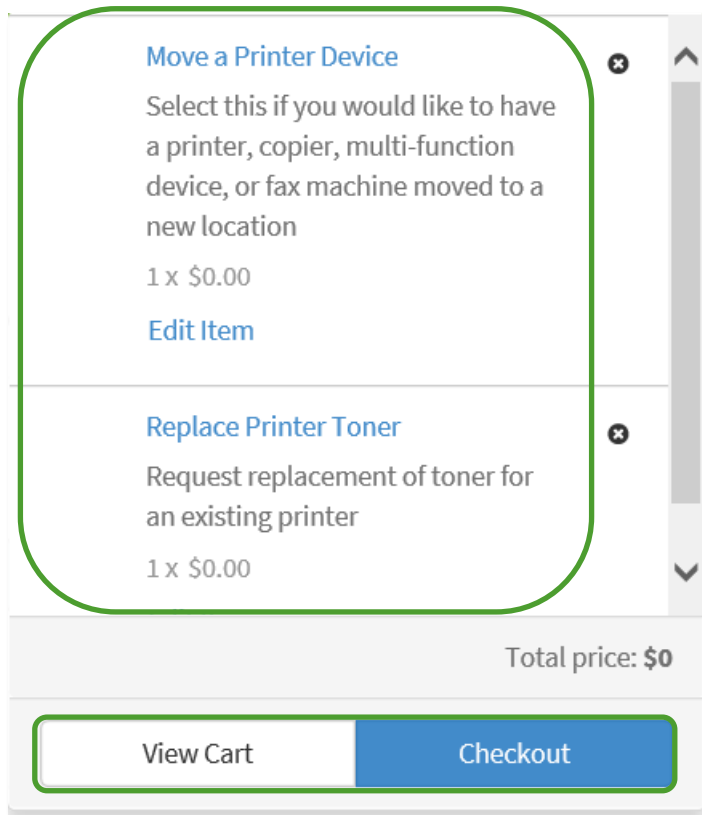
When you have completed all of your Catalog Items, you will Checkout to complete the creation of the Request.

### Completing Checkout

1. Click on the **Cart** icon in the Navigation bar. This displays a summary of the items in the cart.



2. Click **Checkout** or **View Cart** to continue to the Cart window.



## Cart Window

### Your Cart

Once you click View Cart or Checkout Cart window will open. You will need to verify the contents of your cart. Ensure every field has the correct information. A red asterisk indicates a mandatory field. You also have the ability to **Edit** or **Delete** an item in the cart.

### Validating the Cart

The **Product** section contains all of the Catalog items ordered.

1. You can Update the item by:
  - A. Clicking the **Pencil** icon to edit the item
  - B. Clicking the **Delete** icon to remove the item from the Cart

Below the Product section is the Requester's information

2. Validate the required fields have accurate information for this order:

- C. Requested for: Is this order for you or are you ordering for someone else?
- D. Requester Manager: Who will be approving the order?
- E. RHM: Select the RHM that the Requested for user is located, this is important for assignment of the order.
- F. Location: This is the location at the RHM.
- G. Phone Number: This is a current contact number for this order, it will not update your profile.

### Your Cart

Product	Price	Quantity	Subtotal
<p><b>Move a Printer Device</b></p> <p>Select this if you would like to have a printer, copier, multi-function device, or fax machine moved to a new location</p>	\$0.00	1	\$0.00
<p><b>Replace Printer Toner</b></p> <p>Request replacement of toner for an existing printer</p>	\$0.00	-	\$0.00
<b>Total price: \$0</b>			

\* Requested for: Self Service01 **C**

\* Requester Manager: **D**

\* RHM: St. Joseph Mercy Ann Arbor **E**

\* Location: AA-SJM Ann Arbor, Main Hospital Bldgs **F**

\* Phone number: 111-222-3364 **G**

Continue Shopping Clear Cart Checkout

## Checkout (continued)

Once all of the required information is completed click **Checkout** to complete the process, the list of all **Open** and **Closed** tickets will display.

**NOTE:** Don't forget to check out! Items will remain in your cart and will not be processed if you fail to check out.

The screenshot displays the ServiceNow Self Service Portal interface. At the top, a purple navigation bar contains the Trinity Health logo and several utility links: System Status, Service Catalog, Knowledge, Change Calendar, and Cart. A user profile icon labeled 'SS' is also present. Below the navigation bar, the 'My Open Tickets' section is active, showing a list of five tickets. Each ticket entry includes a title, a ticket ID, priority, and status. The tickets are: 'Replace Printer Toner' (RITM01511829, Low, Work in Progress), 'Move Printer' (RITM01511828, Low, Work in Progress), 'Test of email communication' (INC03023083, Low, Assigned), 'Unable to Access Any Internet Sites' (INC03023071, Low, Assigned), and 'Automation Testing - Scenario 141' (INC03023070, Low, Assigned). A 'View all' link is located at the bottom right of this list. Below the open tickets, the 'My Closed Tickets' section is shown with the message 'No records found'.

My Open Tickets			
<a href="#">Replace Printer Toner</a>	RITM01511829	4 - Low	Work in Progress ••
<a href="#">Move Printer</a>	RITM01511828	4 - Low	Work in Progress ••
<a href="#">Test of email communication</a>	INC03023083	4 - Low	Assigned ••
<a href="#">Unable to Access Any Internet Sites</a>	INC03023071	4 - Low	Assigned ••
<a href="#">Automation Testing - Scenario 141</a>	INC03023070	4 - Low	Assigned ••

First 5 of 15 View all

My Closed Tickets			
No records found			