



Cherwell Quick Start Guide for Connect Customers

Copyright © 2015 by Connect

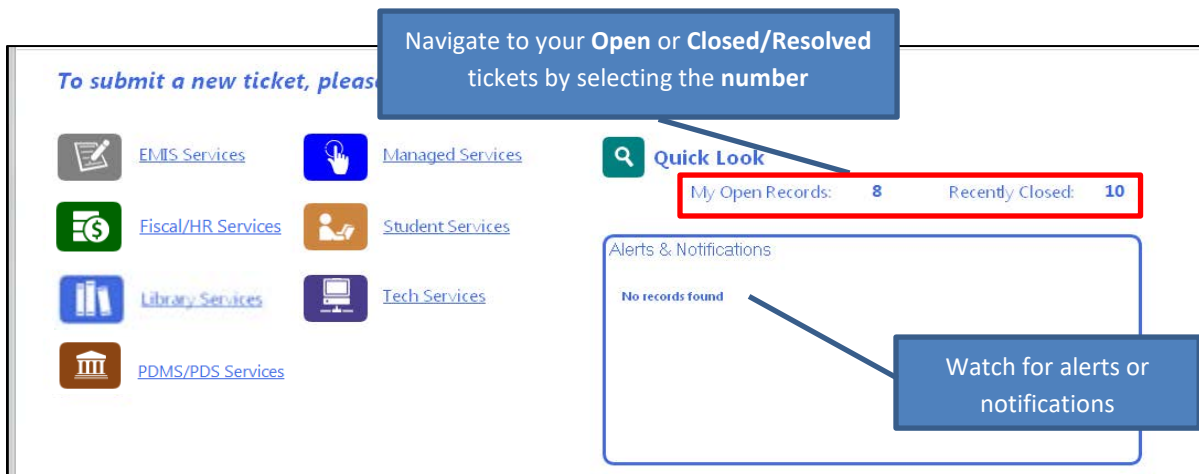
**All rights reserved. This guide is for the use of Connect customers only.
This guide or any portion thereof may not be reproduced or used in any manner by any other
organization, its employees, or its customers.**

Cherwell tickets can be created and managed via **email**, the online **customer portal**, or a **combination** of both. If additional assistance is needed, please refer to the *Connect Step-by-step Cherwell Guide* or contact the Connect Service Team from which support is received.

Creating and Managing Tickets via the Customer Portal

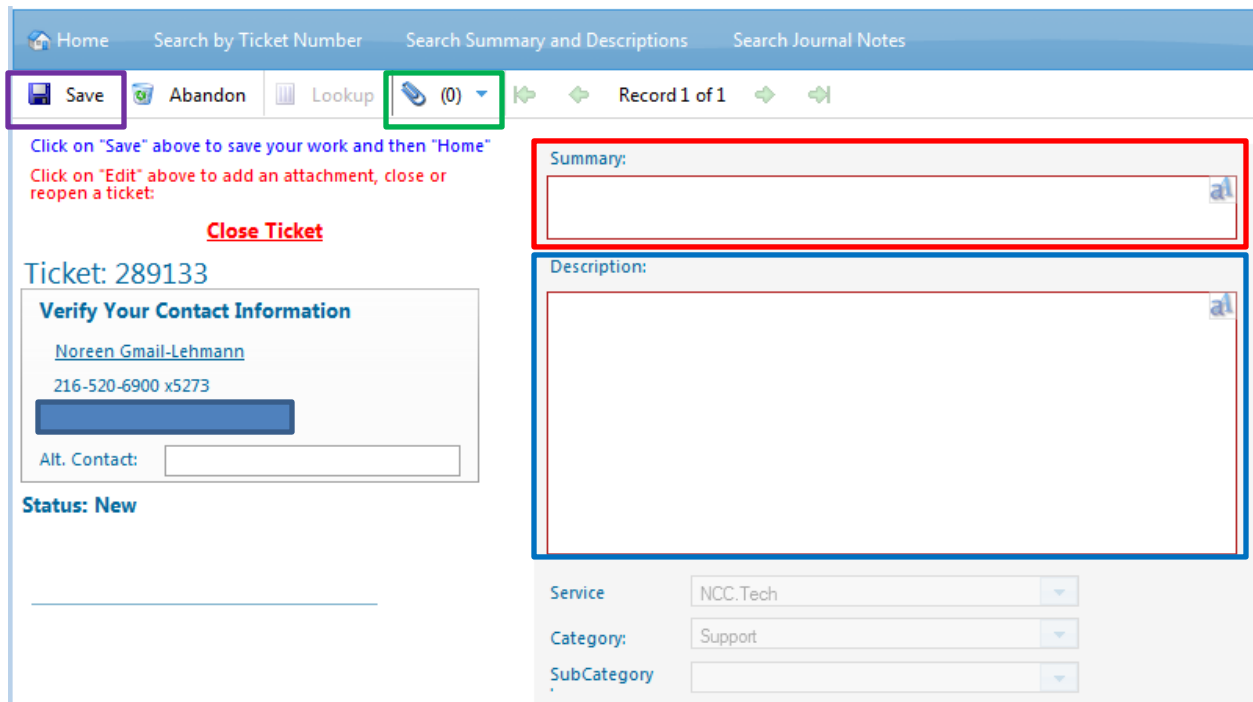
1. **Navigate to the Customer Portal:** <https://support.oecn.org/CherwellPortal/connect>
2. **At the sign-in screen, enter your login:**
User Name: typically, your district email address
Password (case-sensitive): if unknown, contact Connect
3. Upon successful login, the **Portal Home Page** will appear.

Depending upon the internet browser, the Sign-in and Change Password windows may need to be closed **manually** using the 'X'. Refresh the screen and select your name to view other account options.



4. To **submit a ticket**, select the appropriate **service area**, then complete the following fields:
 - A. **Summary:** If you have not been instructed otherwise by a Connect service area, please enter the *summary* line with a format similar to the following:
 - ▶ **Connect District Code: Topic** (e.g. LKW: Payroll question)
 - ▶ **Building/Code – Your Name – Topic** (e.g. AMSHS - Sue – Add calendar closed date)
 - B. **Description:** Provide specific details pertaining to your request.
 - C. **Attachments** (optional): Select the paperclip to add files.
 - D. **Save:** Save to create the ticket.

Important Note: Please do not ever edit the **original** description as it may not be apparent to Connect staff. If there is a critical typo that needs to be clarified or if additional information must be added, please select *Edit* and choose to *Add Comment*.



5. **Edits:** Once the ticket is saved, the *Edit* button must be selected before any modifications can be completed.
 - **Add Comment:** Select this option to add more information to the ticket; displays as a *journal* entry.
 - **Close ticket:** Only displays if the ticket is open.
 - **Reopen ticket:** Only displays if the ticket is resolved. **Note:** Connect discourages use of the *Reopen* option as reopened tickets may not be brought to the attention of Connect Staff by the Cherwell system.
6. **Journal Entries:** Most activity on a ticket (e.g. change of status, new comments) is logged in a *journal entry*, viewable in the portal.

Creating and Managing Tickets via Email

Creating a ticket via email – When creating a ticket via email, the customer should receive an email notification confirming that the ticket was created. If that does not happen, please contact the appropriate Connect service area.

1. **To line:** Send an email using the appropriate email address below in the **To:** line. Do **not** include any other addresses on the To:, CC:, or BCC: line.

Service Area	Email Address
EMIS Services (both fiscal and student)	emis-cherwell@ohconnect.org
Fiscal Services	fiscal-cherwell@ohconnect.org
Library Services	library-cherwell@ohconnect.org
Managed Services	mervices-cherwell@ohconnect.org
PDMS/PDS (aka IPDP/Events) Services	pd-cherwell@ohconnect.org
Student Services	student-cherwell@ohconnect.org
Technical Services (both network and systems)	tech-cherwell@ohconnect.org

2. **Subject line:** The subject line of the email becomes the *summary* line of the ticket.
3. **Body:** Anything included in the body of the email (e.g. signature line, legal/confidentiality statements) will also be entered into the Cherwell ticket and may cause undesired clutter. Any embedded images (e.g. logos, backgrounds) will most likely become attachments on the ticket.
4. **Attachments:** Any email attachments will be added as attachments on the Cherwell ticket.

Managing a ticket via email

OECN Email Notifications: As tickets are created or updated, email notifications will be received from an OECN email address (support@oecn.org).

Attachments: If an attachment was sent via an email client (e.g. Outlook, Gmail, Yahoo), that attachment will **not** be included in the email notification received from the OECN; however, the attachment will be posted to the ticket.

Customers may reply to the OECN email notification to update the ticket as follows:

1. **Provide additional information:** Reply to the OECN email to update the ticket (adds a *journal* entry).
2. **Close the ticket:** The OECN email may contain a link towards the bottom to close the ticket.
3. **Reopen the ticket:** The OECN email may contain a link towards the bottom to reopen the ticket. **Note: Connect discourages use of the *Reopen* option as reopened tickets may not be brought to the attention of Connect Staff by the Cherwell system.**

When replying to an OECN email:

- Do **not** include any other addresses on the To:, CC:, or BCC: line.
- Do **not** edit the email subject line, as the ticket will not be updated and Connect will not receive the reply.
- If it is desired that another individual be kept *In-the-Know* on ticket progress, supply the contact information to Connect.