



Cherwell Quick Start Guide for Connect Customers

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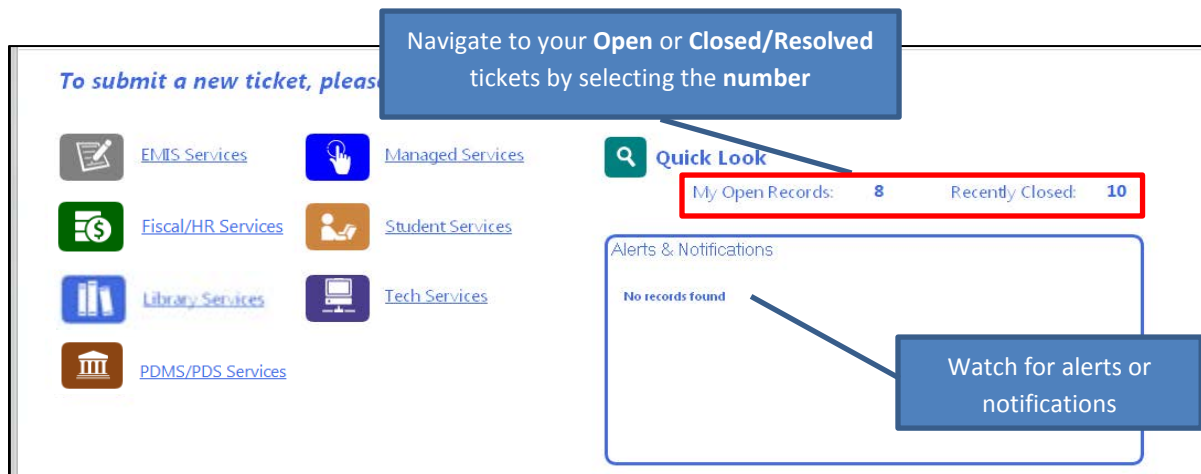
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Cherwell tickets can be created and managed via **email**, the online **customer portal**, or a **combination** of both. If additional assistance is needed, please refer to the *Connect Step-by-step Cherwell Guide* or contact the Connect Service Team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