



# **Cherwell Step-by-Step Guide for Connect Customers**

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Connect utilizes Cherwell (pronounced *share-well*) to provide helpdesk support to customers. Cherwell allows customers to monitor the status of their support requests, which are entered as tickets (aka incidents). It also provides the ability to view/search old tickets, eliminating the need to retain email.

### General Information:

- Cherwell tickets can be created and managed via **email**, the online **customer portal**, or a **combination** of both.
- For quick or simple questions, customers may prefer to use email to create and update the ticket.
- As the ticket is updated, the customer and anyone in-the-know on the ticket may receive email notifications regarding the status, additional information/questions, or resolution. You may reply to the email notification to update the ticket or use the portal.
- If Cherwell assistance is needed, please 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

**Sign-in**  
If you have a Cherwell account, sign-in here

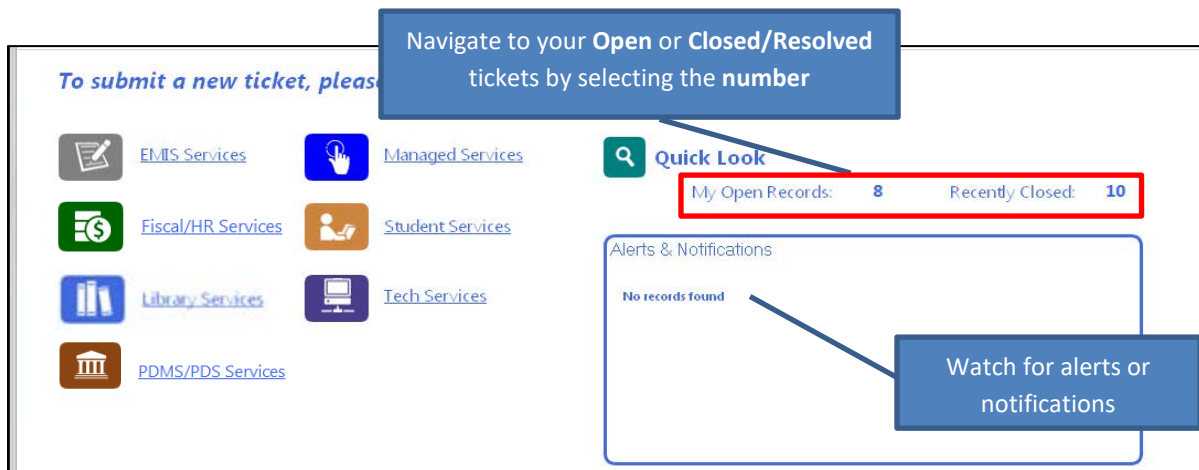
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User Name  
Enter your user name

Password  
Enter your password

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

3. Upon successful login, the **Portal Home Page** will appear.
4. To **submit a ticket**, select the appropriate **service area**.



The screenshot shows the Portal Home Page with several service area icons: EMIS Services, Managed Services, Fiscal/HR Services, Student Services, Library Services, Tech Services, and PDMS/PDS Services. A 'Quick Look' widget displays 'My Open Records: 8' and 'Recently Closed: 10'. An 'Alerts & Notifications' section shows 'No records found'. Annotations include: 'Navigate to your Open or Closed/Resolved tickets by selecting the number' pointing to the Quick Look widget; 'To submit a new ticket, please' pointing to the service area icons; and 'Watch for alerts or notifications' pointing to the Alerts & Notifications section.

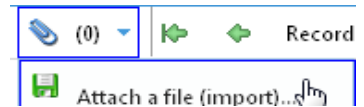
5. Complete the following fields:

A. **Summary:** Think of the *summary* line as the subject line of an email. If you have not been instructed otherwise by an 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:** Think of the *description* as the body of an email and provide specific details pertaining to your request.

C. **Attachments (optional):** To add an attachment, select the *Edit* button and then select the paperclip to *Attach a file*.

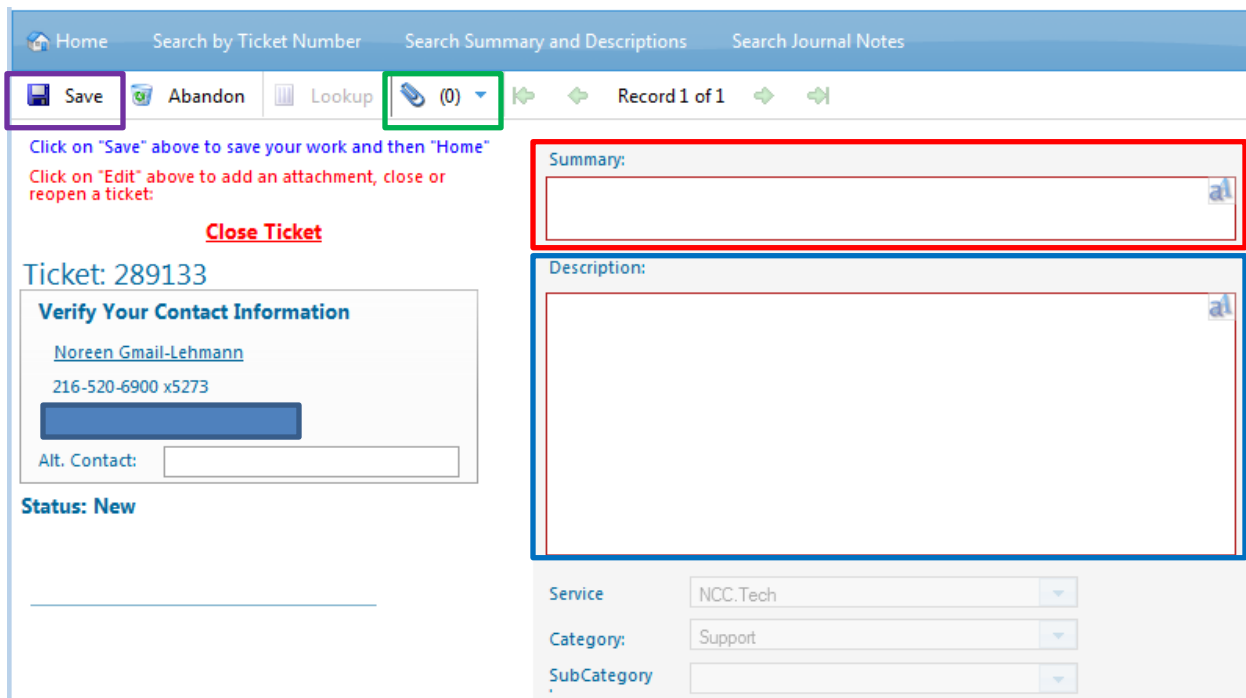


- **Name:** The *Name* will become the filename for the attachment. Leave the *Name* blank to retain the original filename.
- **Description:** Complete only if needed for clarification.
- **File Name:** Use the green + to navigate to the file

D. **Category:** (For Library and PDMS/PDS Service Areas only.) If a ticket has been created via the portal in the Library or PDMS/PDS Service Area, customers should **not** select a different *category* on the ticket *unless* they are authorized to request new Sirsi or PDMS/PDS accounts.

E. **Save:** Save to create the ticket.

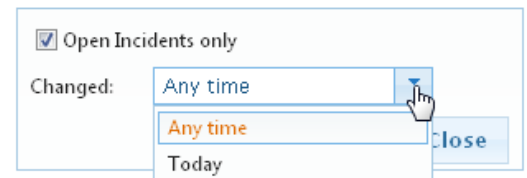
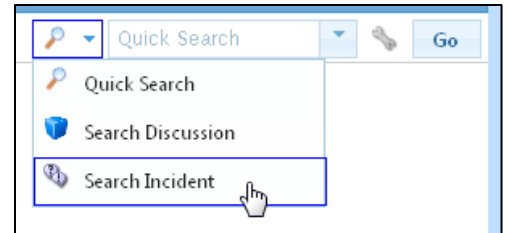
**Important Note:** Please do not ever edit the **original** description as it may not be apparent to Connect staff. If there is a critical typo that needs to be clarified or if additional information must be added, please select *Edit* and choose to *Add Comment*.



6. **Other edits:** After 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 appears if the ticket is open.
  - **Reopen ticket:** Only appears 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.

7. **Searching:**

- A. To search within the text of any *open* tickets/incidents, select the *magnifying glass* and choose *Search Incident*
- B. To search *both open and closed* incidents, or to *limit by date*, select the tool icon and adjust the options as needed. These tool options will not appear unless *step A* above has already been completed.



8. **Journal Entries:** Most activity on a ticket (e.g. change of status, new comments) is logged in a *journal entry*, viewable in the portal. Example:

Journal - Mail History, Created By Cherwell Admin, 1/7/2015 12:05 PM  
 Details: Subject: Ticket No. 58480 Status Has Been Changed To In Progress  
 From: support@oecn.org  
 To: customer.name@abcschools.org  
 Date: 1/7/2015

Ticket No. 58480  
 Service / Category / SubCategory: Connect.HR / Other /  
 Summary: LKW - M Smith - Password reset  
 Requestor: Customer Name  
 Assigned To: ITC Staff Name  
 Status: In Progress  
 Description:

My password is expired. Please reset.

## Creating and Managing Tickets via Email

To create a ticket via email, send an email from the email address in your Cherwell customer contact record. If you send an email and receive a reply that the *Cherwell ticket was not created*, then the address from which you sent the email does not match the one in your Cherwell customer contact record.

**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)	<a href="mailto:emis-cherwell@ohconnect.org">emis-cherwell@ohconnect.org</a>
Fiscal Services	<a href="mailto:fiscal-cherwell@ohconnect.org">fiscal-cherwell@ohconnect.org</a>
Library Services	<a href="mailto:library-cherwell@ohconnect.org">library-cherwell@ohconnect.org</a>
Managed Services	<a href="mailto:mervices-cherwell@ohconnect.org">mervices-cherwell@ohconnect.org</a>
PDMS/PDS (aka IPDP/Events) Services	<a href="mailto:pd-cherwell@ohconnect.org">pd-cherwell@ohconnect.org</a>
Student Services	<a href="mailto:student-cherwell@ohconnect.org">student-cherwell@ohconnect.org</a>
Technical Services (both network and systems)	<a href="mailto:tech-cherwell@ohconnect.org">tech-cherwell@ohconnect.org</a>

2. **Subject line:** The subject line of the email becomes the *summary* line of the ticket.
3. **Body:**
  - The body of the email should include any details relevant to the question/request.
  - 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](mailto: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. Attachments may be retrieved via the portal, or may be sent by ITC staff to customers through the Cherwell system.

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:** Depending upon the status of the ticket, the OECN email may contain instructions and a link towards the bottom to close the ticket.
3. **Reopen the ticket:** Depending upon the status of the ticket, the OECN email may contain instructions and 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.