

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.
- Most customers may prefer to use email to create and update their tickets.
- 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 assistance with using Cherwell is needed, please contact the Connect Service Team from which support is typically received.

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.

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:** 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. **CC line:** If you carbon copy (CC) another individual on the email, and if that other individual also has a Cherwell customer record, then that individual **will automatically be added as In-the-Know on the ticket**.
3. **Subject line:** The subject line of the email becomes the *summary* line of the ticket.
4. **Body:**
 - The body of the email becomes the *description* in the ticket. The body 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.
5. **Attachments:** Any email attachments will be added as attachments on the Cherwell ticket.

Managing a ticket via email

Cherwell Email Notifications: As tickets are created or updated, email notifications will be received from the *Connect Support* email address (support@ohconnect.org).

Connect Support

[update] Ticket 2866 has a reply - Test 1

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 Connect Support; 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 Cherwell email notification to update the ticket as follows:

1. **Provide additional information:** Reply to the email notification to update the ticket.
2. **Resolve the ticket:** Depending upon the status of the ticket, the email notification 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 email notification 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 email notification:

- Know that if you reply via email, **you will also receive a copy of your own response** in the form of a Cherwell email notification; this is by design as a verification that your reply updated the ticket.
- 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.

Categories of Cherwell Email Notifications

It is essential to understand the level of importance for each *category* of Cherwell email notification. This will help customers understand which they should absolutely review versus others that are less informative. Connect has added [text] 'tags' in the email subject lines to make it easier to identify what type of notification it is and also to create email filters/rules as desired.

- **[auto]** – This signifies an automated system message that is generated typically when 1) a new ticket is created or 2) when there is a change in status and that status does not include any type of human-generated response.
- **[update]** – This signifies a human-generated response that should be reviewed.
- **[new]** – This signifies that a ticket was reopened.

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Cherwell Email Subject Line	Importance and Explanation
[auto] Ticket ##### created	Less important. Notification is only sent to the customer if the ticket is created via email or by a Connect staff member in the ITC client. No notification is sent if the customer creates the ticket in the online customer portal.
[auto] Ticket ##### set to in progress	Less important. Notification will not contain a 'human' response. The purpose is to inform customers that work has started on a ticket and may indicate the Connect staff member assigned to the ticket.
[auto] Ticket ##### set to pending	Less important. Notification will not contain a 'human' response. The purpose is to inform customers that a ticket has been set to pending and may indicate a pending <i>reason</i> (e.g. Acknowledged, Hold, Waiting for Customer, etc).
[update] Ticket ##### has a reply	Important. Notification contains a 'human' response, whether from the analyst, the customer him/herself (if a response was sent via email), an In-the-Know contact, or another contact who was copied on a response from the Connect analyst.
[update] Ticket ##### resolved	Importance varies. Notification may or may not contain a 'human' response, depending on whether the Connect analyst adds a comment when setting the ticket to <i>Resolved</i> status.
[new] Ticket ##### reopened	Importance varies. Notification will not contain a 'human' response, but it alerts the customer to watch for more updates on a ticket that had been resolved previously.






Creating and Managing Tickets via the Customer Portal






1. **Navigate to the Customer Portal:** <https://helpdesk.ohconnect.org/cherwellportal/itc>
2. **At the sign-in screen, enter your login:**
 - User Name:** your district email address
 - Password** (case-sensitive): if unknown, contact the Connect Service area from which you need support
3. Upon successful login, the **Portal Home Page** will appear.

Welcome to Connect's Self-Service Portal

To submit a new ticket, please select the appropriate service area.

IMPORTANT: After entering your ticket details, you may need to select the **SAVE** button multiple times until it grays out.
Alternatively, select the **HOME** button and, if prompted to save changes, select **YES**.

-  [EMIS Services](#)
-  [Fiscal/HR Services](#)
-  [Library Services](#)
-  [PDMS/PDS Services](#)
-  [eFinancePlus Services](#)

-  [Managed Services](#)
-  [Student Services](#)
-  [Tech Services](#)
-  [Phone Change Request](#)
-  [Static IP Request](#)

Quick Look

My Open Tickets

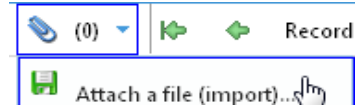
2

Recently Resolved or Closed Tickets

155

Navigate to your **Open** or **Resolved/Closed** tickets by selecting the number.

4. To **submit a ticket**, select the appropriate **service area**.
5. Complete the following fields:
 - A. **Summary:** Think of the *summary* line as the subject line of an email.
 - 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 after the ticket has already been created, select the *Edit* button and then select the paperclip to *Attach a file*. **If the only edit you make to an existing ticket is to attach a file, Connect does not receive any kind of notification that it has been added. It is important to send a reply to Connect.**
 - **Name:** The *Name* will become the filename for the attachment. Leave the *Name* blank to retain the original filename.
 - **Select File:** Use 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.



Home Journals ▾

Save Abandon ⌂ ✖ 🔍 📎 (0) ▾ ↩ ➡ Record 1 of 1 ⌂ ☰ ☰

Ticket

2874

[Close Ticket](#)

Status: New

To add more information to your ticket, click Edit > Comments tab > New Journal-Customer Request. Then Click the Save icon to save your change.

Ticket Information

Contact Name:

Service:

Category:

Created Date Time:

Owned By:

Owned By Team:

IMPORTANT: After entering your ticket details, you may need to select the SAVE button multiple times until it grays out. Alternatively, select the HOME button and, if prompted to SAVE changes, select YES.

Summary:

Description:

Thanks,
Customer

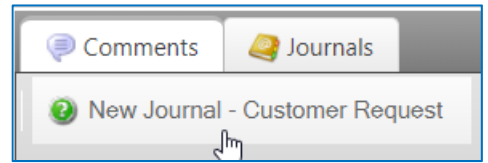
A Specifics form may appear below and need to be filled out to save and submit .

- 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*.

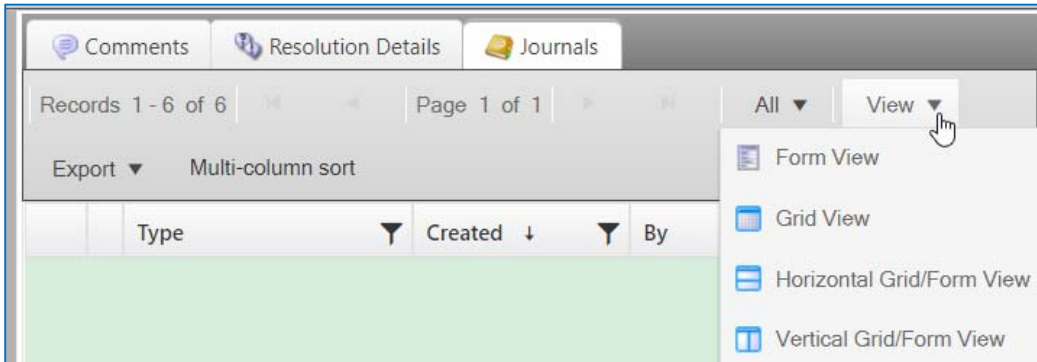
6. **Other edits:** After the ticket is saved, the *Edit* button must be selected before any modifications can be completed.

- **New Journal – Customer Request:** On the *Comments* tab, select this option to add more information to the ticket.
- **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. **View:**

- You may customize your view in different areas within the portal. Look for the *View* menu:

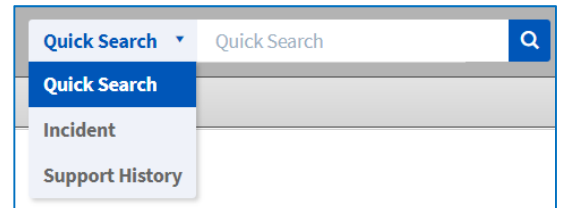


- When navigating for the first time from the *Home* screen to your open/closed tickets, you may find you cannot select a ticket to view the *details*. Navigate to the hamburger icon in the upper left, and select this option:



8. **Searching:**

- Quick Search & Incident Search:** For customers, both these search options may yield the same results. You may search by ticket number or enter a general search term and a list of matching records will display.
- Support History:** Searches tickets from the previous ITC-Shared environment.



9. **Journal Entries:** Outside of customer *Comments* made by the customer in the portal, all other activity on a ticket is logged in a *journal entry*, viewable in the portal.

