Cherwell Helpdesk Portal & E-Mail Options

NEOMIN Helpdesk Guide

neomin

Created by Autumn Roper, NEOMIN, March 2015
- S:\Cherwell\Training\CUSTOMER GUIDE – NEOMIN Helpdesk 2015.docx
- Updated 5/4/2015 to include Google Chrome issues and removal of body text when replying via email. AR
- Updated 7/26/2016 to include new domain name changes. AR

# Table of Contents

Overview of NEOMIN Helpdesk

- This guide explains the *Helpdesk Portal* <u>and</u> the e-mail functionality of NEOMIN's helpdesk system called, Cherwell Service Management.

- NEOMIN customers can receive help in two ways:
  (1) using the *Helpdesk Portal*, or
  (2) sending an e-mail to NEOMIN, via a specific e-mail address, per service area.

- The *User Portal* is an online portal that allows NEOMIN end-users to submit their problems in the form of a "ticket". In return, NEOMIN analysts troubleshoot submitted problems or provide guidance about products.

- The e-mail options available in this helpdesk software allow NEOMIN customers to open tickets, close tickets, reopen a closed ticket, make comments, attach documents, and manage their NEOMIN helpdesk tickets without accessing the *Helpdesk Portal*.

Locating the Helpdesk Portal

- Open a web browser (i.e. Internet Explorer, Firefox, Chrome, etc.)

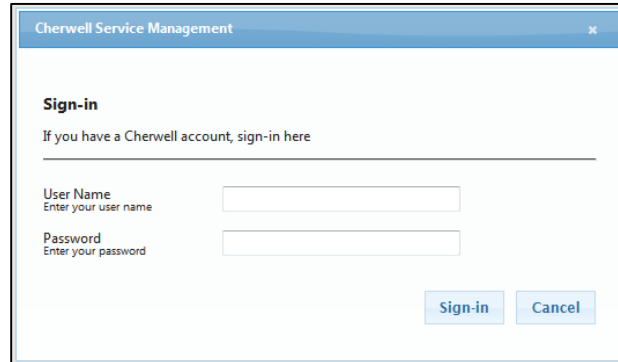- Go to URL: https://support.oecn.org/cherwellportal/neomin

  Note: This web link will be available on the bottom of NEOMIN's homepage.

- To create a desktop shortcut, click and hold the icon next to the URL, and drag and release onto your desktop.
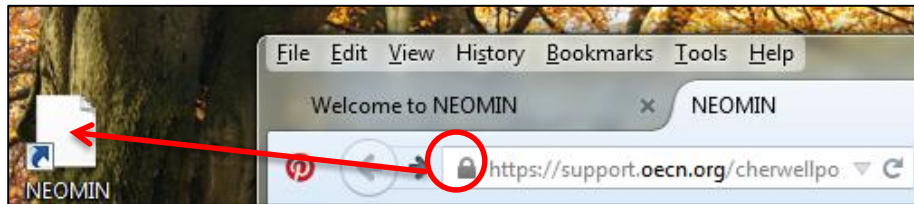
Sign-in to the Helpdesk Portal

- Open a web browser (i.e. Internet Explorer, Firefox, Chrome – *Note: If using Chrome, see additional notes at bottom of this page*)

- Go to URL: https://support.oecn.org/cherwellportal/neomin

- The *Helpdesk Portal* uses NEOMIN's active directory service. Login information is stored in a "**domain**". You need to know your "**domain**" in order to sign-in to the portal.

yourdomain\firstname.lastname

Domains:	
districtland	**(Majority of NEOMIN users)**
lakeview	(all Lakeview users)
acesc	(only users with a PC in the main building)
blmf	(only users at Mespo)

### Example: **districtland\autumn.roper**

- Password is your **NEOMIN E-mail password.** If you don't use NEOMIN e-mail, your password is your **ProgressBook password**.

- Click "**Sign-in**".

NOTE: If you are using **Google Chrome**, after you press "Sign-in", you will need to press "F5" on your keyboard to refresh your screen. This will update the top right-hand corner customer login information, too. Pressing the "X" on the sign-in dialog box will not update the customer login information.

How to Open a Ticket

- To create a new ticket, select an appropriate NEOMIN Service Area that pertains to your problem:
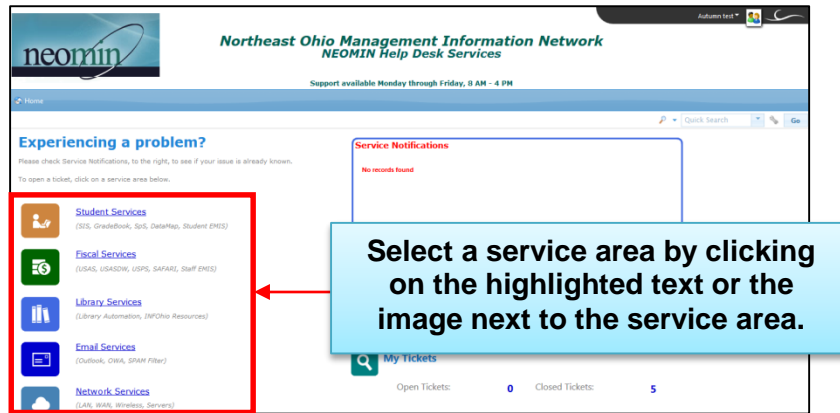
- Enter a brief summary for your ticket (this is similar to an e-mail Subject line). Also enter a detailed description of your problem.
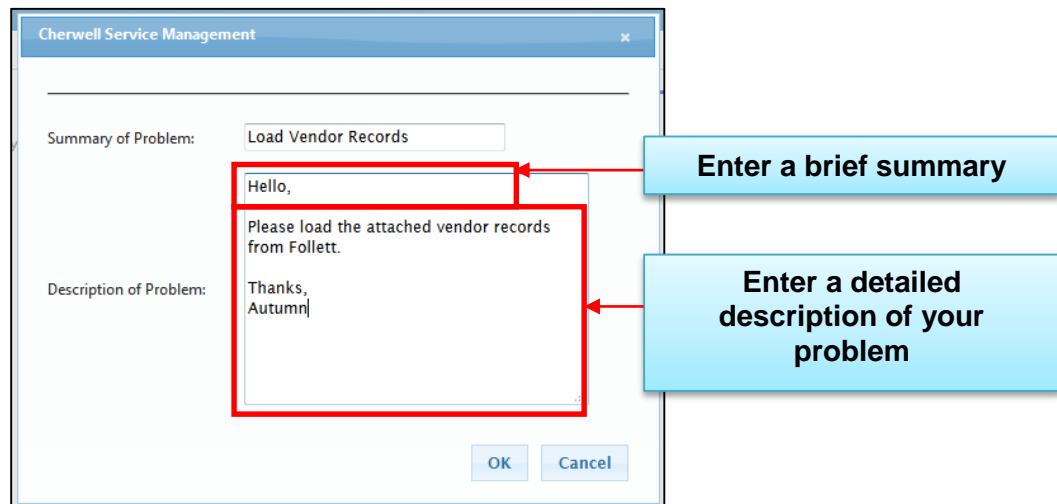
Note: you can add attachments on the next screen, after clicking "OK".

- Click "**OK**". You will receive an e-mail from "**OECN Support**" that shows your ticket information. NEOMIN will also receive an e-mail notification.

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How to Open a Ticket – cont.

- After you click "**OK**", you have the option to edit your ticket (*to add an attachment or modify your summary and/or description*).

- Or, click the "**Home**" button, located on the blue toolbar, to save your ticket and return to the home screen. 🏠 Home

Saves ticket. Goes to home screen.

🏠 Home

✏️ Edit 🏷️ (0) ⬅️ Record 1 of 1 ➡️

Click on "Home" above to save your ticket

Click on "Edit" above to add an attachment, close or reopen a ticket:

Add Comment   Close Ticket

To make changes to your ticket, or to add an attachment, click on "Edit". The attachment icon is next to "Edit".

Ticket: 90090

Customer Information

Autumn test

330-847-6464

Autumn.test@neomin.org

Alt. Contact: [   ]

Status: New

Summary:

TEST Load Vendor Records

Description:

TEST

Hello,

Please load the attached vendor records from Follett.

Thanks,
Autumn

Service: NEOMIN.INFOhio ▼

Category: [   ] ▼

SubCategory: [   ] ▼

Indicates the Service Area that you selected.

Owned By:

Owned by: - not yet assigned -

Owned by Team: NEOMIN-INFOhio

Journals

Journal - History, Created By Autumn test, 3/17/2015 9:45 AM

Ticket activity between you and a NEOMIN analyst are documented under "Journals".

Rich Text Editor ✕

B U I ≣ ≣ ≣ ≣ ≣ ≣

Microsoft Sans Serif,san ▼ 6 (24pt) ▼ A ▼ ◇ ▼ 🖼️ 🔗

TEST
Hello,

Please load the attached vendor records from Follett.

Thanks,
Autumn

[Text Editor] You can temporarily enlarge your font, if needed.

OK   Cancel

How to View Open & Closed Tickets

- From the *Helpdesk Portal* home screen, click the number next to "**Open Tickets**" or next to "**Closed Tickets**" to view the tickets in each area.
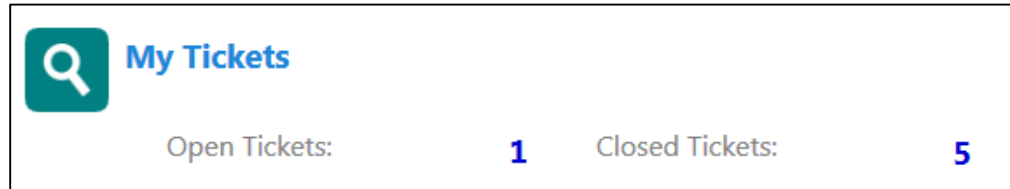
- Toggle through the different options, on the top right, to adjust your ticket view.

| Show current record | Show results list | Show results grid |
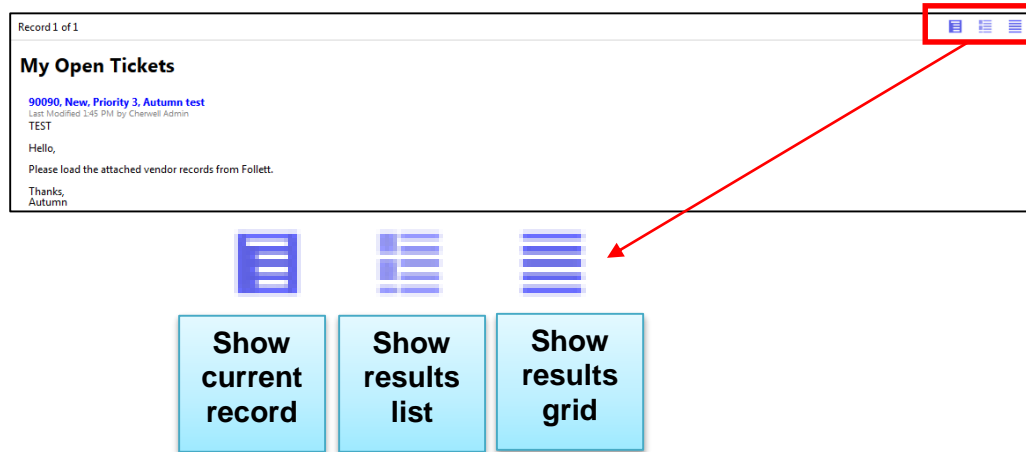
- Example of "***Show Results Grid***" view option on My Open Tickets:

My Open Tickets

ID	Customer Name	Created Date Time	LastModifiedDateTime	Service	Status	Pending Reason	Summary
90090	Autumn test	3/17/2015 9:45 AM	3/17/2015 1:45 PM	NEOMIN.INFOhi	New		TEST Load Vendor Records

View the ticket's status and pending reasons (i.e. escalated, hold)

- *Note: Click the "Home" button on the blue toolbar to navigate back to the home screen.*

How to Add Comments to an Open Ticket

- From the *User Portal* home screen, click the number next to "**Open Tickets**" to view all of your open tickets.

- Double-click on a ticket to view the selected ticket.

- Click on "**Edit**" to enable editing of the ticket, then click "**Add Comment**".

- Enter a comment in the provided window. Click "**OK**".

- Your comment will display at the bottom of the "**Journal**" section:

How to Close a Ticket

- From the *Helpdesk Portal* home screen, click the number next to "**Open Tickets**" to view all of your open tickets.

- Double-click on a ticket to view the selected ticket.

- Click on "**Edit**" to enable editing of the ticket, then click "**Close Ticket**".

- In the pop-up window, provide a reason for closing the ticket. Click "**OK**".
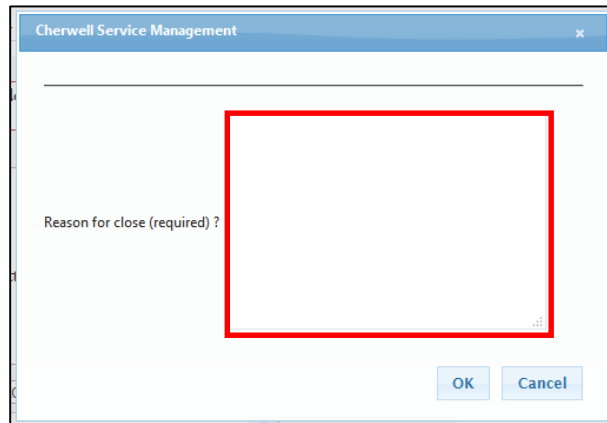
- The ticket will move to the "**Closed Tickets**" section of the portal. Click the "**Home**" button to navigate back to the home screen.

- *Note: Tickets can be set to a status of "**Resolved**" by a NEOMIN analyst. **A resolved ticket will automatically close after three business days.** You can reopen the ticket if there is a need.*
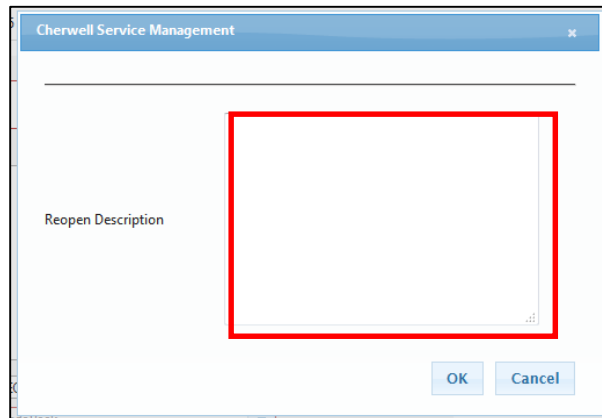
How to Reopen a Closed Ticket

- From the *Helpdesk Portal* home screen, click the number next to "**Closed Tickets**" to view all of your closed tickets.

- Double-click on a ticket to view the selected ticket.

- Click on "**Edit**" to enable editing of the ticket, then click "**Reopen Ticket**".

- Add a reopen description to reopen your ticket. Click "**OK**".

- The ticket will move to the "**Open Tickets**" section of the portal. Click the "Home" button to navigate back to the home screen.

How to Open a Ticket Using E-mail

Open a helpdesk ticket by sending an e-mail to one of the following NEOMIN Service Area e-mail addresses:

Email.support@neomin.org
Fiscal.support@neomin.org
Infohio.support@neomin.org
Network.support@neomin.org
Student.support@neomin.org
Specialed.support@neomin.org

- Using an e-mail client (i.e. Microsoft Outlook), open a new e-mail.

- The "**To:**" address should be one of the service area e-mail addresses from above, as it pertains to the problem.

- The "**Subject:**" acts as the "**Summary of Problem**" and the body of the e-mail as the "**Description of Problem**" of the ticket.
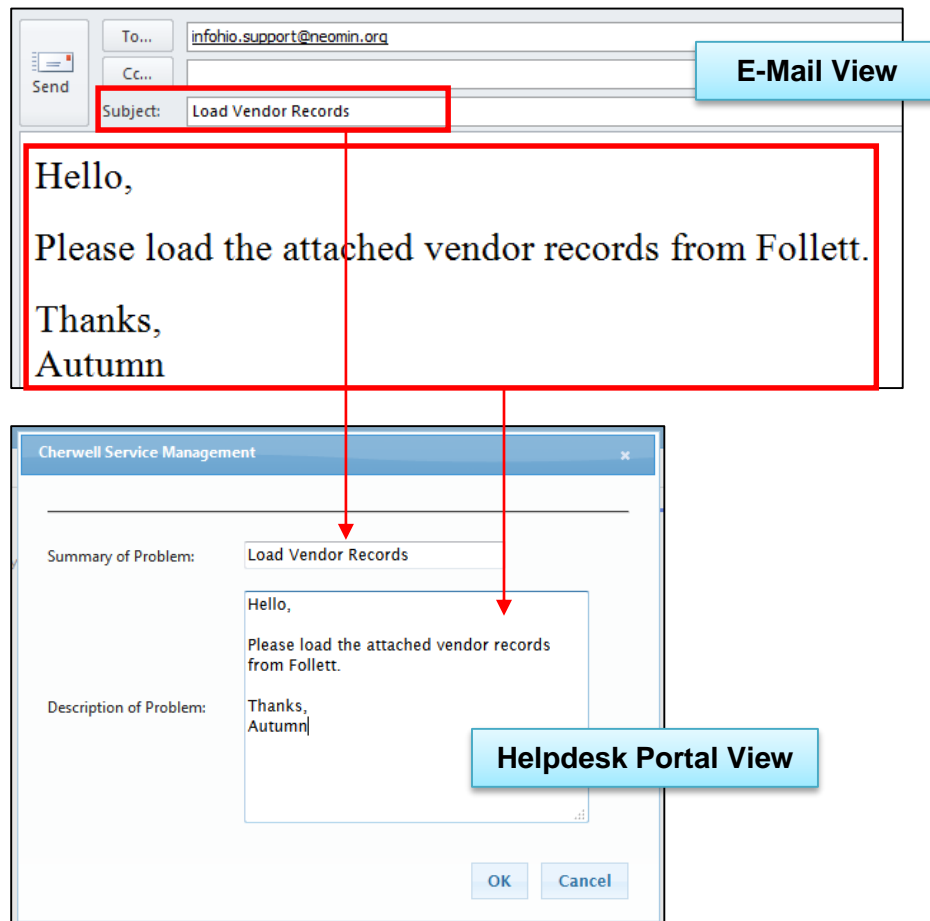
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How to Open a Ticket Using E-mail – cont.

- E-mail attachments can be added to your message; which in turn will attach to the ticket within the helpdesk.

- After submitting a ticket via e-mail, you will receive notification from "**OECN Support**" that states your ticket has been created:

✉	OECN Support	Ticket No.91101 Has Been Created

- To add a comment to your ticket, open the last ticket notification that you received and press "**Reply**".

  Note: It is recommended that you delete the entire body text of the email before typing your new comment. By removing the previous body text from the message, you are eliminating unnecessary journal text entries in the *Helpdesk Portal*.

- Type a comment, and press "**Send**".

  *Note: the "**To:**" address will be "**OECN Support <support@oecn.org>**". Do not change this address.*

- **DO NOT DELETE THE ORIGINAL SUBJECT LINE**, as this is what keeps everything linked together and working properly.

How to Close a Ticket Using E-mail

- To close a ticket using e-mail, scroll to the bottom of the e-mail ticket and click the link, "Please close my ticket".

> If you determine that you no longer need assistance, please click here: Please close my ticket, Do not change the subject line and be sure to include your closing comments in the body of the email.
>
> -Thank you.

- Do not change the subject line.

- In the body of the email, include your closing comments. Press "**Send**".