

Cherwell Helpdesk Portal & E-Mail Options

NEOMIN Helpdesk Guide



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	3
<u>Cherwell Helpdesk Portal</u>	
Locating the Helpdesk Portal	4
Sign-in to the Helpdesk Portal	5
How to Open a Ticket	6
How to View Open & Closed Tickets	8
How to Add a Comment to an Open Ticket	9
How to Close a Ticket	10
How to Reopen a Closed Ticket	11
<u>E-mail Options</u>	
How to Open a Ticket Using E-mail	12
How to Close a Ticket Using E-mail	14

Overview of NEOMIN Helpdesk

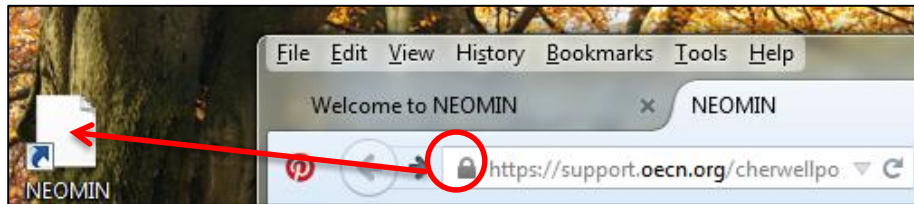
- This guide explains the *Helpdesk Portal* and the e-mail functionality of NEOMIN's helpdesk system called, Cherwell Service Management.
- NEOMIN customers can receive help in two ways:
 - (1) using the *Helpdesk Portal*, or
 - (2) sending an e-mail to NEOMIN, via a specific e-mail address, per service 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>

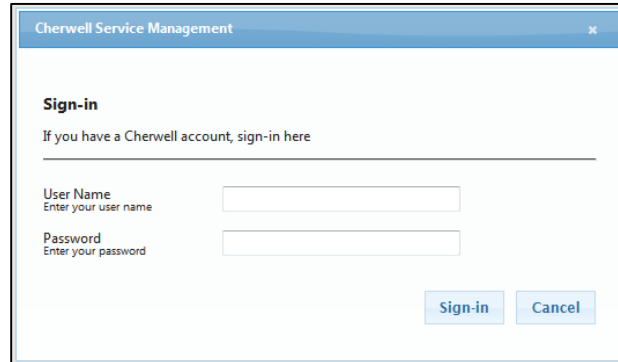
Note: This web link will be available on the bottom of NEOMIN's homepage.

- 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 screenshot shows a window titled "Cherwell Service Management" with a "Sign-in" section. It contains the text "If you have a Cherwell account, sign-in here" followed by a horizontal line. Below the line are two input fields: "User Name" with the instruction "Enter your user name" and "Password" with the instruction "Enter your password". At the bottom right of the dialog are two buttons: "Sign-in" and "Cancel".

- 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.ropar

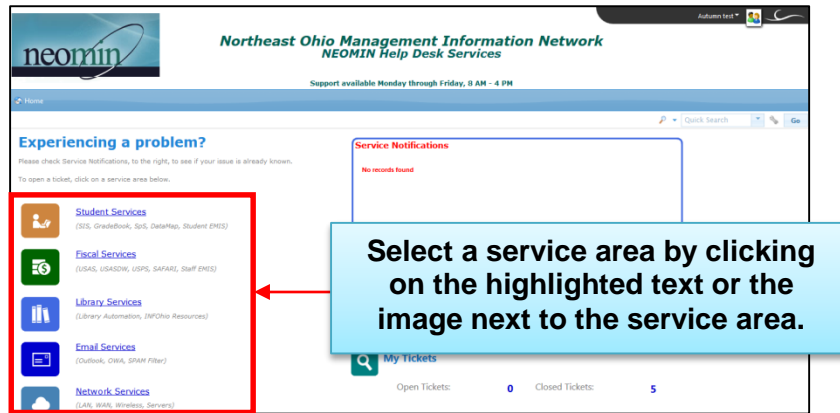
- Password is your **NEOMIN E-mail password**. If you don't use NEOMIN e-mail, your password is your **ProgressBook password**.
- Click "**Sign-in**".



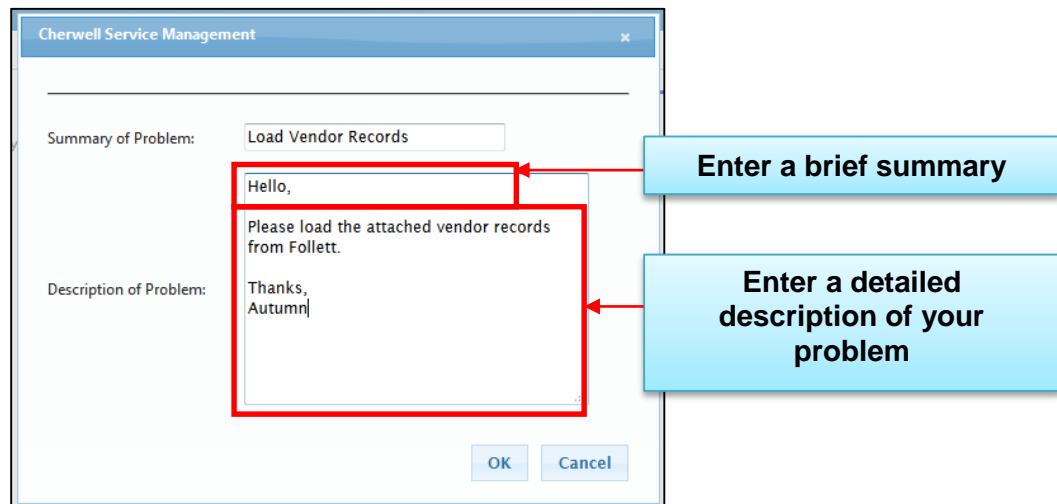
NOTE: If you are using **Google Chrome**, after you press "Sign-in", you will need to press "F5" on your keyboard to refresh your screen. This will update the top right-hand corner customer login information, too. Pressing the "X" on the sign-in dialog box will not update the customer login information.

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.

Saves ticket. Goes to home screen.

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

Indicates the Service Area that you selected.

Journals

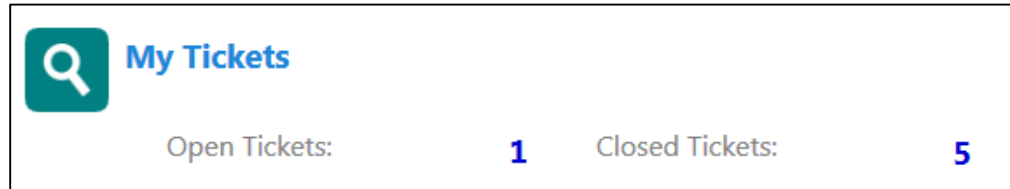
Ticket activity between you and a NEOMIN analyst are documented under “Journals”.

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

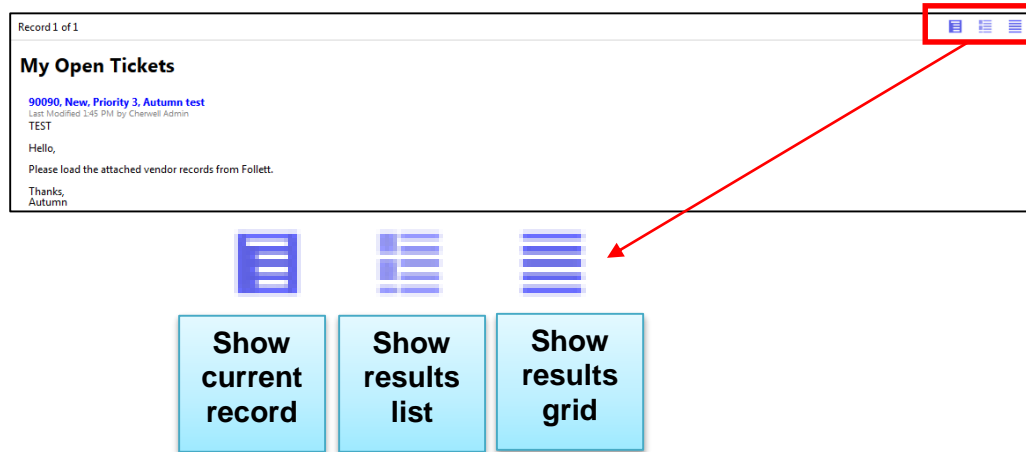
The screenshot shows a ticket management interface. At the top, there is a blue toolbar with a 'Home' button and an 'Edit' button with an attachment icon. Below the toolbar, there is a 'Summary' section with the text 'TEST Load Vendor Records'. The 'Description' section contains the text 'TEST Hello, Please load the attached vendor records from Follett. Thanks, Autumn'. Below the description, there are dropdown menus for 'Service' (set to 'NEOMIN.INFOhio'), 'Category', and 'SubCategory'. At the bottom, there is a 'Journals' section with the text 'Journal - History, Created By Autumn test, 3/17/2015 9:45 AM'. A 'Rich Text Editor' window is open, showing the text 'TEST Hello, Please load the attached vendor records from Follett. Thanks, Autumn' with a font size of 6 (24pt). The 'Home' button is annotated with a callout box stating 'Saves ticket. Goes to home screen.' The 'Edit' button is annotated with a callout box stating 'To make changes to your ticket, or to add an attachment, click on “Edit”. The attachment icon is next to “Edit”.' The 'Service' dropdown menu is annotated with a callout box stating 'Indicates the Service Area that you selected.' The 'Journals' section is annotated with a callout box stating 'Ticket activity between you and a NEOMIN analyst are documented under “Journals”.' The 'Rich Text Editor' window is annotated with a callout box stating '[Text Editor] You can temporarily enlarge your font, if needed.'

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.



- Example of “**Show Results Grid**” view option on 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”.

1) Edit Ticket

2) Add Comment

The screenshot shows the 'Home' page of the Cherwell Service Management system. At the top, there is a navigation bar with a home icon and the text 'Home'. Below this, there is a toolbar with an 'Edit' button (pencil icon) and a dropdown menu showing '(0)'. To the right of the toolbar, there are navigation arrows and the text 'Record 1 of 1'. Below the toolbar, there are instructions: 'Click on "Home" above to save your ticket' and 'Click on "Edit" above to add an attachment, close or reopen a ticket:'. Below these instructions, there are two buttons: 'Add Comment' and 'Close Ticket', both highlighted with a red box. The main content area is divided into two columns. The left column contains 'Ticket: 90090', 'Customer Information' (Autumn test, 330-847-6464, Autumn.test@neomin.org, Alt. Contact: [input field]), and 'Status: New'. The right column contains 'Summary: TEST Load Vendor Record' and 'Description: TEST Hello, Please load the attached vendor records from Follett. Thanks, Autumn'.

- Enter a comment in the provided window. Click “OK”.

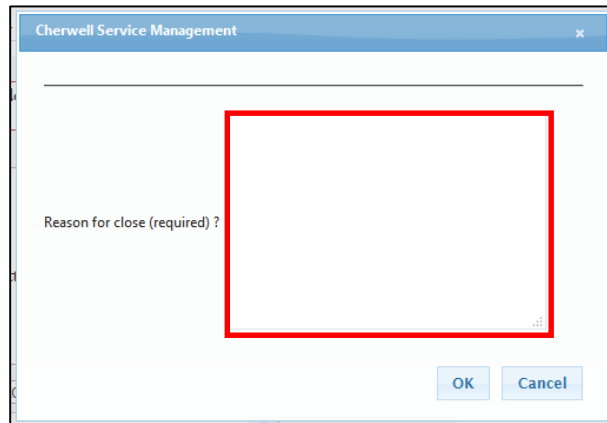
The screenshot shows a dialog box titled 'Cherwell Service Management'. Inside the dialog box, there is a text area with the placeholder text 'Add your comment here'. Below the text area, there are two buttons: 'OK' and 'Cancel'.

- Your comment will display at the bottom of the “Journal” section:

The screenshot shows the 'Journals' section of the Cherwell Service Management system. It displays a list of journal entries. The first entry is 'Journal - Mail History, Created By Cherwell Admin, 3/17/2015 9:45 AM'. The second entry is 'Journal - Customer Request, Created By Autumn test, 3/17/2015 3:19 PM'. The details for the second entry are: 'Last Modified 3:19 PM by Autumn test' and 'Details: test comment'. The second entry and its details are highlighted with a red box.

How to Close a Ticket

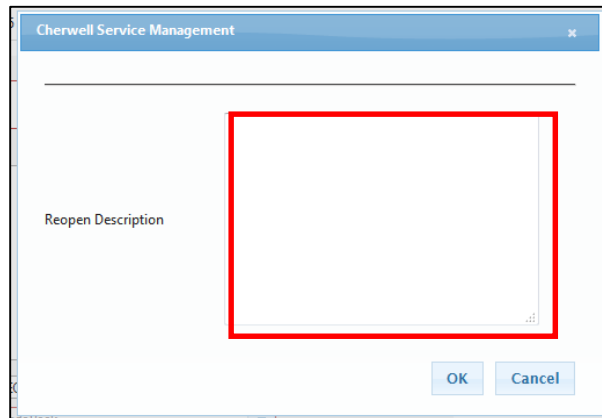
- From the *Helpdesk Portal* home screen, click the number next to “**Open Tickets**” to view all of your open tickets.
- Double-click on a ticket to view the selected ticket.
- Click on “**Edit**” to enable editing of the ticket, then click “**Close Ticket**”.
- In the pop-up window, provide a reason 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**”.



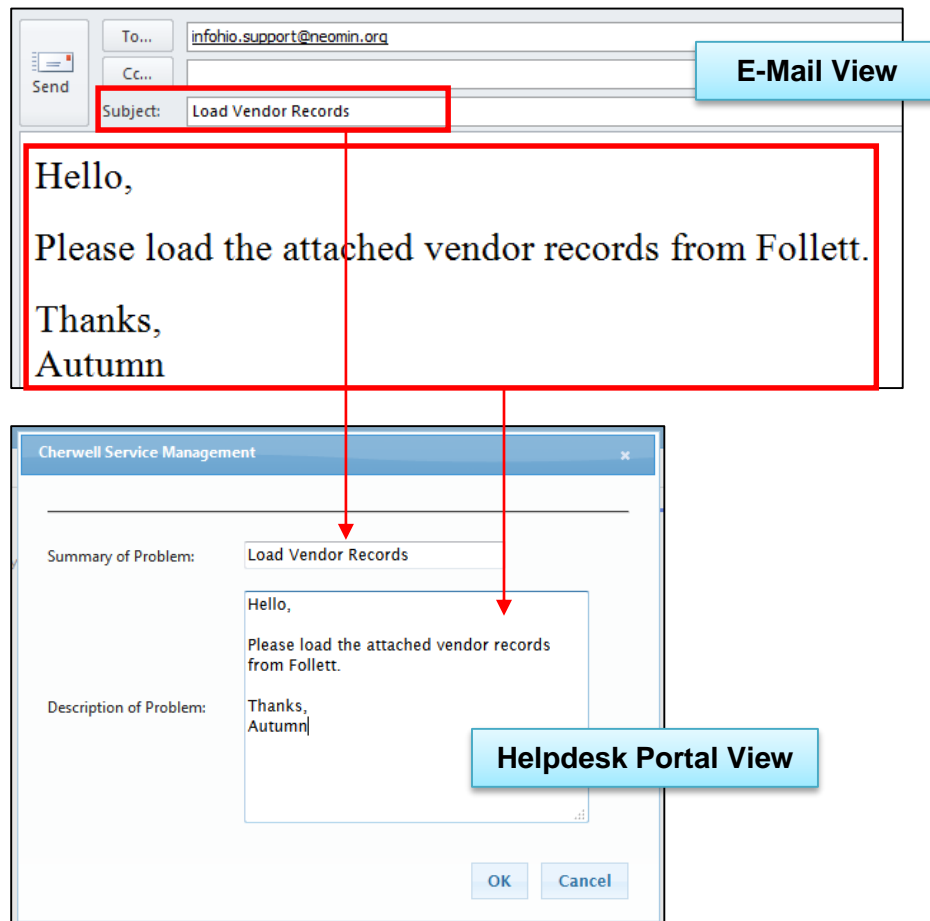
- The ticket will move to the “**Open Tickets**” section of the portal. Click the “Home” button to navigate back to the home screen.

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:



- 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**".