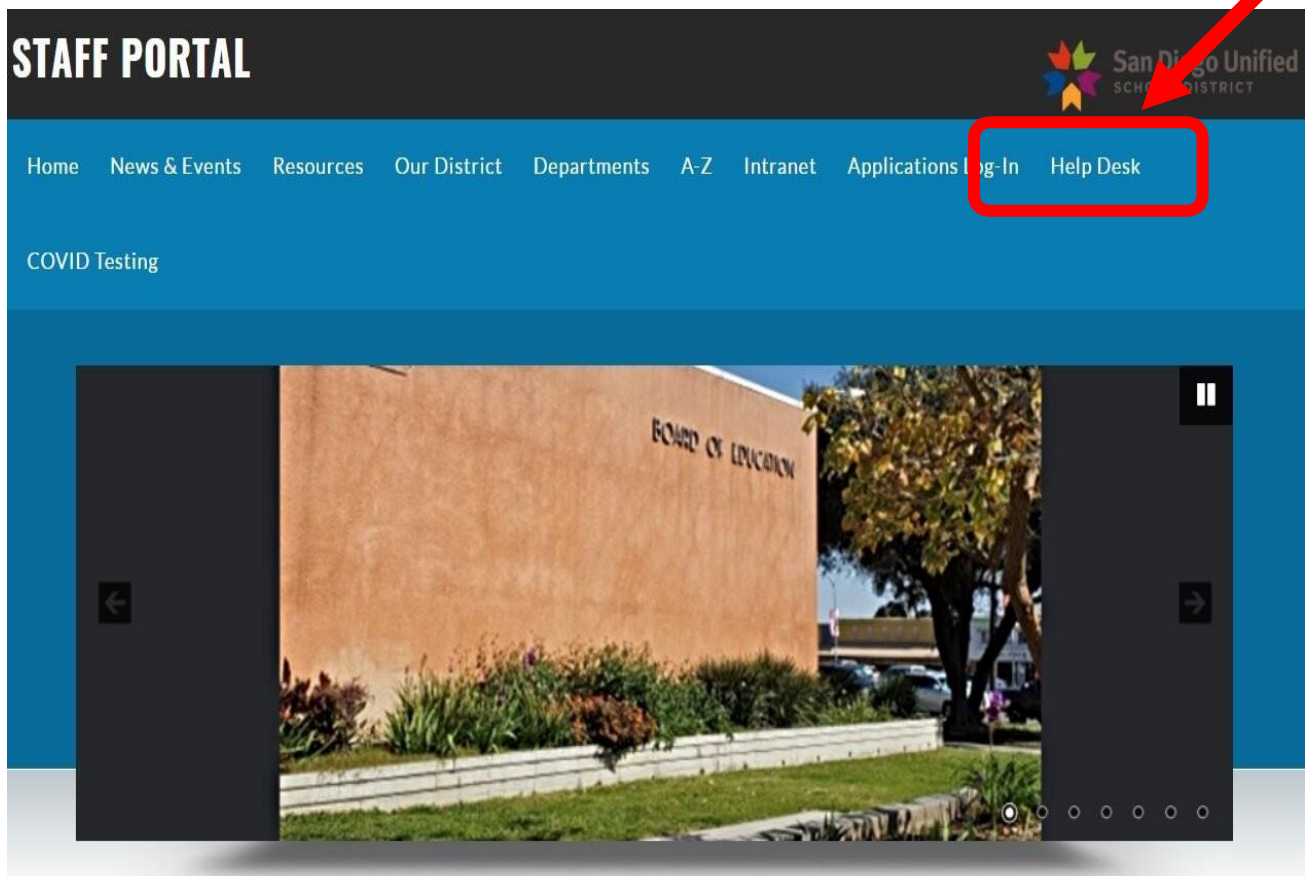# How to Report an Issue in Cherwell

October 2021

The **IT Help Desk** at **San Diego Unified School District** uses the **Cherwell Service Management** system to create and manage service request 'tickets' for technical support and IT services. This Job Aid was created to assist District staff in using the online web form to create their own tickets in the **Cherwell Service Management (CSM)** system for technical support or IT service.

Follow the steps below to **Report an Issue** using the **Cherwell Service Management** system.

Note: There are three, distinct options available to **Report an Issue** *(listed below)*. All three provide District staff the steps necessary to create their own Incident Tickets online using the **Cherwell CSM** system.

<u>**Option 1**</u>:

1. On the **San Diego Unified School District** website, click on the **Staff Portal**. In the top, right corner of the page click on the link, **Help Desk**.

2. The **Help Desk/Technical Support** home page will display. Under the heading, **Help Desk News**, you will find important information regarding the new **Cherwell Service Management** system. To get to the **Cherwell CSM** home page, simply click on the link: https://sdusd.cherwellondemand.com *(see the* **red** *arrow below)*.

IT Department / IT Resources / Help Desk/Technical Support

HELP DESK/TECHNICAL SUPPORT

Report a Problem or Ticket Status

DWA – District Wide Applications

Reset Your Password

Contact Help Desk Staff

→ Password Self Service
→ PowerSchool Handbooks & Job Aids
→ Online Learning - Resources For Teachers
→ Online Learning - Resources For Families
→ Email
→ Google Suite Help
→ Instructional Technology
→ i21 Classroom Refresh
→ Self Help
→ Tech Tips

HELP DESK NEWS:

The IT Help Desk telephone line at 619-209-4357 (HELP) is working and agents are on duty **during normal business hours (7am - 5pm, Monday - Friday)** to take your calls.

You can also submit requests for assistance through the District's self-service portal to the online Cherwell ticketing system at https://sdusd.cherwellondemand.com/.

Additionally, you can email your request for assistance to us at helpdesk@sandi.net and our Cherwell system will automatically turn your email into a Help Desk ticket. Please make sure to include your name, employee ID, and a telephone number where you can be reached.

DEVICE RETIREMENT (THIS POLICY HAS BEEN SUSPENDED AT THIS TIME)

After an IT device has been in service at the district for 5 years, the IT department may remove the equipment or administratively disable it in order to keep the districts network secure, efficiently utilize the district's technology support resources, and reduce ongoing infrastructure and licensing costs to the district.

You can read more about device retirement at the following link...

https://www.sandi.net/itd/it-resources/security/device-retirement

SUBMIT YOUR TICKET ONLINE USING CHERWELL SERVICE MANAGEMENT

With a browser like Internet Explorer, Chrome or Firefox, you can submit a new Help Desk Ticket, or check the status of an existing ticket, any time via Cherwell Service Management at...

https://sdusd.cherwellondemand.com

- See instructions on how to report an issue in Cherwell CSM
- See instructions on how to report an issue for someone else in Cherwell CSM
- See instructions on how to view your open tickets in Cherwell CSM
- See instructions on how to change your password in Cherwell CSM

Please create 1 ticket per computer for equipment hardware issues. Each ticket may report multiple issues about a computer/equipment.

Note: There are four Job Aids available with instructions on how to use the **Cherwell Service Management** system *(see the* **green** *highlighted area above)*. To learn more about how to use the basic features of the **Cherwell CSM** system, simply click on any Job Aid link to open it in a new tab *(in* **PDF** *form)*.

3. On the **Cherwell Service Management** home page, click the **Login** button in the upper, right corner of the page to log in to your **Cherwell CSM** account.
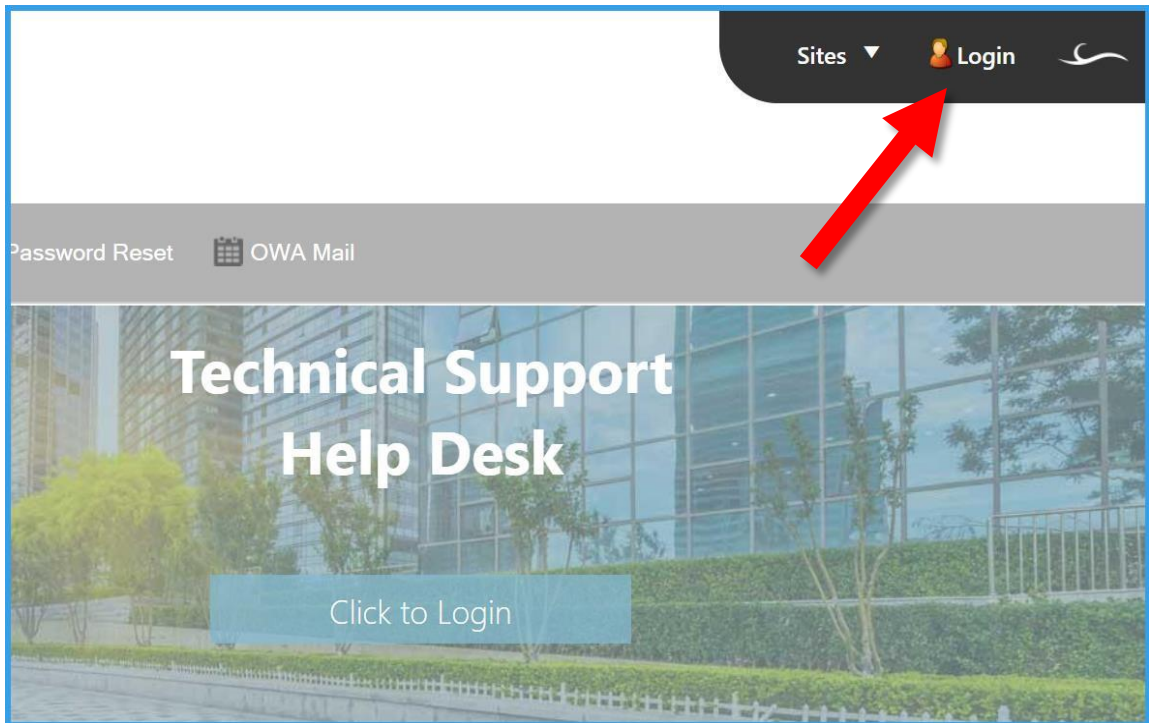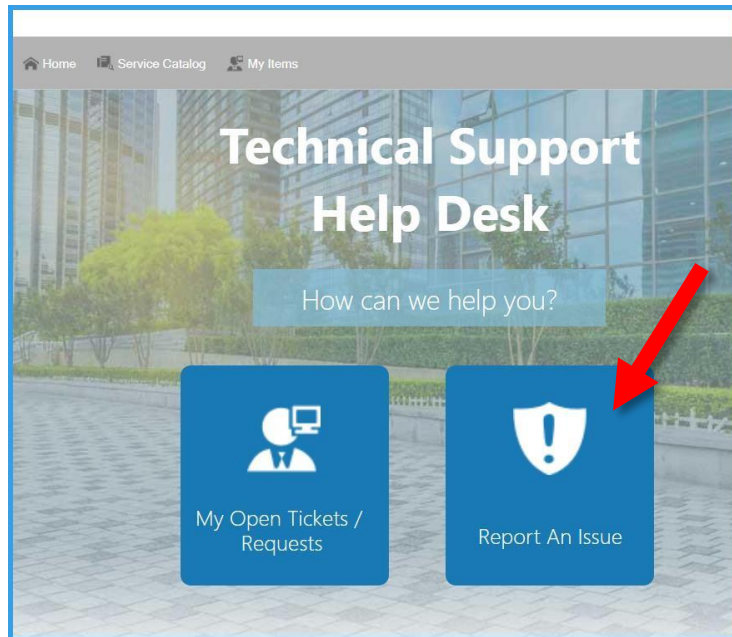

4. The **SDCS** login page will appear. Enter your District (**DWA**) **Employee ID** and **Password,** then click the **Sign in** button below.
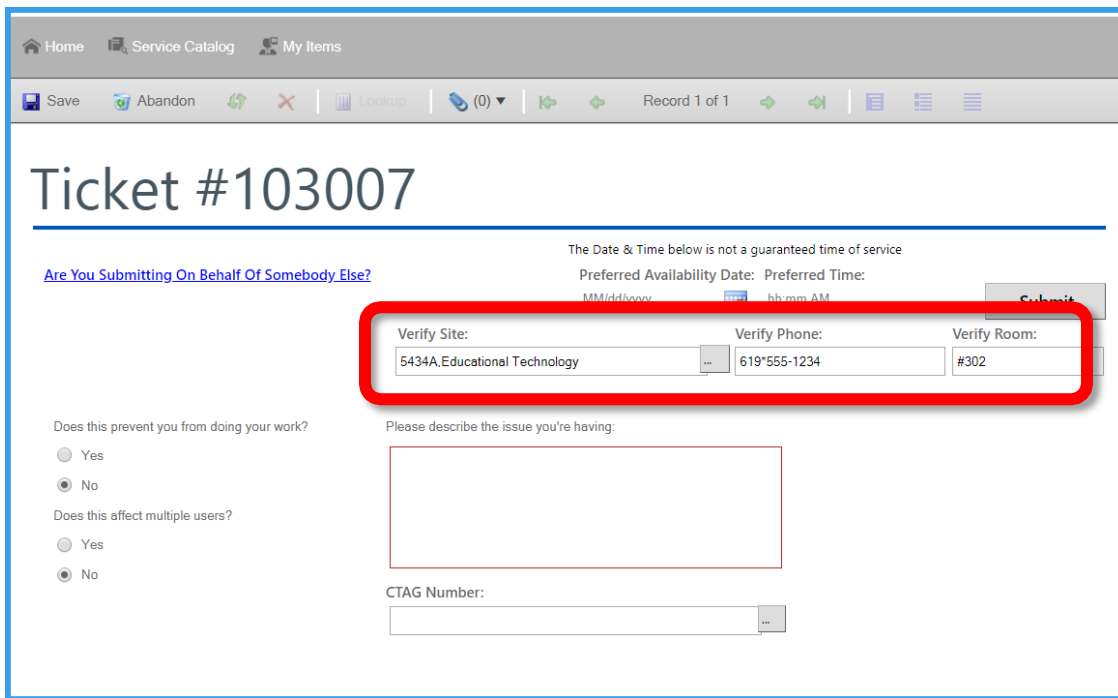
5. Your **Cherwell Service Management** account home page will display. To report an issue, simply click the **Report An Issue** button below.

6. A new Incident Ticket will be generated with its corresponding number. First, verify that your **Site**, **Room Number**, and **Phone Number** are accurate. If needed, make corrections to these fields.

San Diego Unified
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7. Then, on the left side of the page, select the radio button(s) that best represent your technical issue.

Does this prevent you from doing your work?

○ Yes

● No

Does this affect multiple users?

○ Yes

● No

8. In the large, **Issue Description** field *(in the center of the page)*, enter a detailed report of the issue or issues you are having.

Please describe the issue you're having:

My mouse cursor is moving very slowly, disrupting the flow of work. Sometimes it is stuck in one position and no matter how much I move the mouse, the cursor just stays in the same place on my computer screen.

9. Below the **Issue Description** field, enter the **CTAG Number** found on your computing device.

Note: The **CTAG** is typically located on the back or the sides of the computing device.

CTAG Number:

C0003688812

Note: If you are only available at a certain time or on a specific day, let us know the best time to assist you. At the top, right side of the page, select the **Date** and **Time** that you are available to receive assistance from **SDCS Technical Support** staff.

The Date & Time below is not a guaranteed time of service
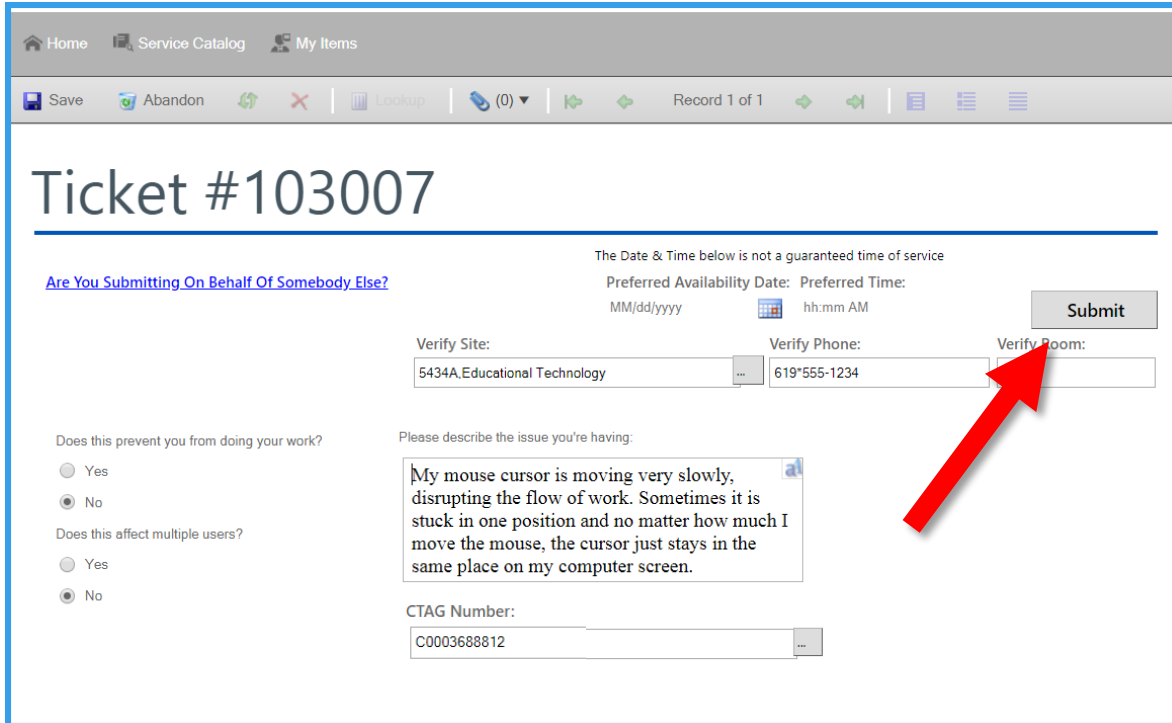
Preferred Availability Date: Preferred Time:

09/07/2018   10:00 AM

◀	Sep ▼		2018 ▼		▶
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

IT Training

10. Finally, review each data field to determine that the **Technical Support** Incident Ticket is filled in completely and accurately. Then, click on the **Submit** button to request assistance from qualified **SDCS Technical Support** staff.

11. A dialog box will appear indicating that the reported incident was added to the **Cherwell Service Management** system. The process of submitting a request for **Technical Support** is now complete.


Note: This Incident Ticket is now available for review in the **My Open Items** section of your **Cherwell CSM** account (*see the* **How to View My Open Tickets in Cherwell** Job Aid).

Instructions on how to report an issue for someone else are available in the **How to Report an Issue for Someone Else** Job Aid.

Option 2:

1. From your **Cherwell Service Management** account home page, click on the **My Open Tickets/Requests** button below.
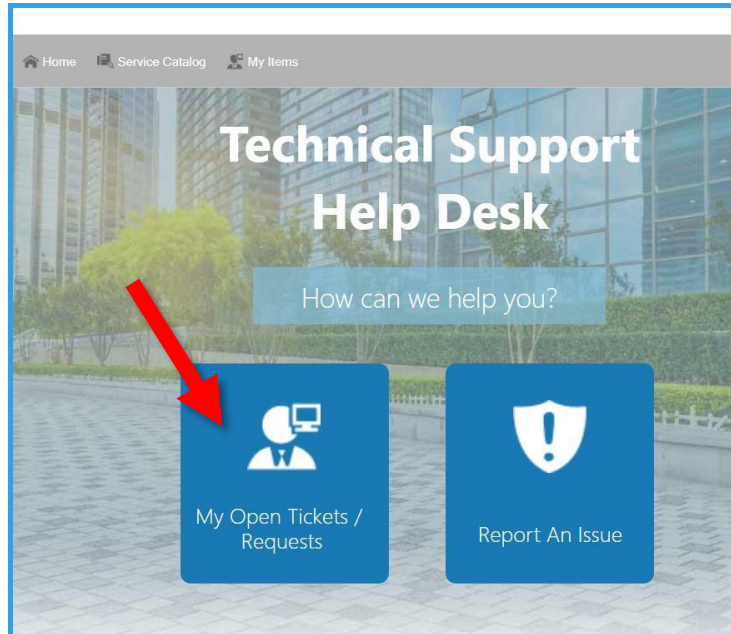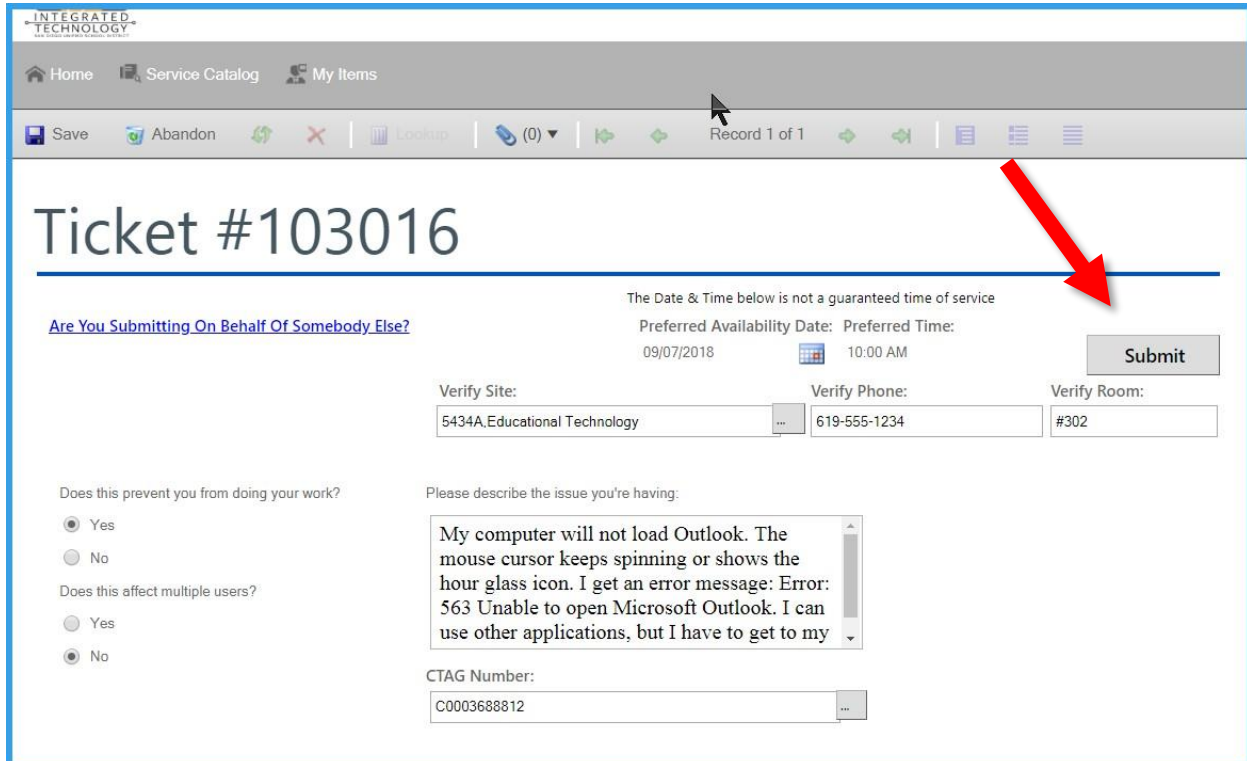
2. Your **My Items** page will display. At the top, right side of the page, click on the **Report an Issue** button.
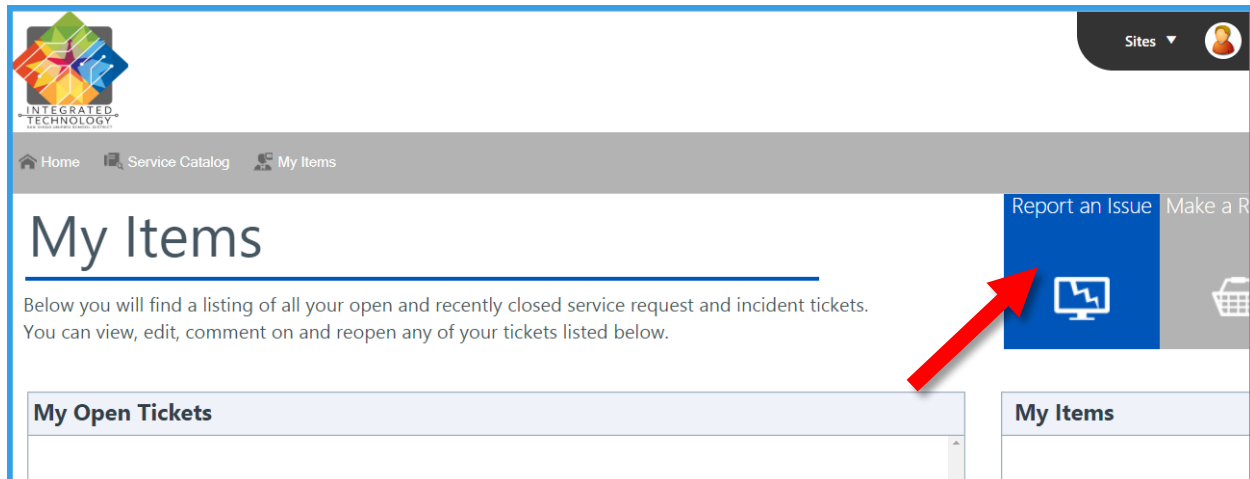
3. A new Incident Ticket will be generated with its corresponding number. Verify that the data entered in each field is complete and accurate. If needed, make corrections to these fields, then click **Submit**.

4. A dialog box will appear indicating that the reported incident was added to the **Cherwell Service Management** system. The process of submitting a request for **Technical Support** is now complete.

Note: This submitted Incident Ticket will be available for review in the **My Open Items** section of your **Cherwell CSM** account (*see the* **How to View My Open Tickets in Cherwell** Job Aid).

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<u>**Option 3**</u>:

1. From your **Cherwell Service Management** account home page, click on the link **Service Catalog** at the top, left side of the page.
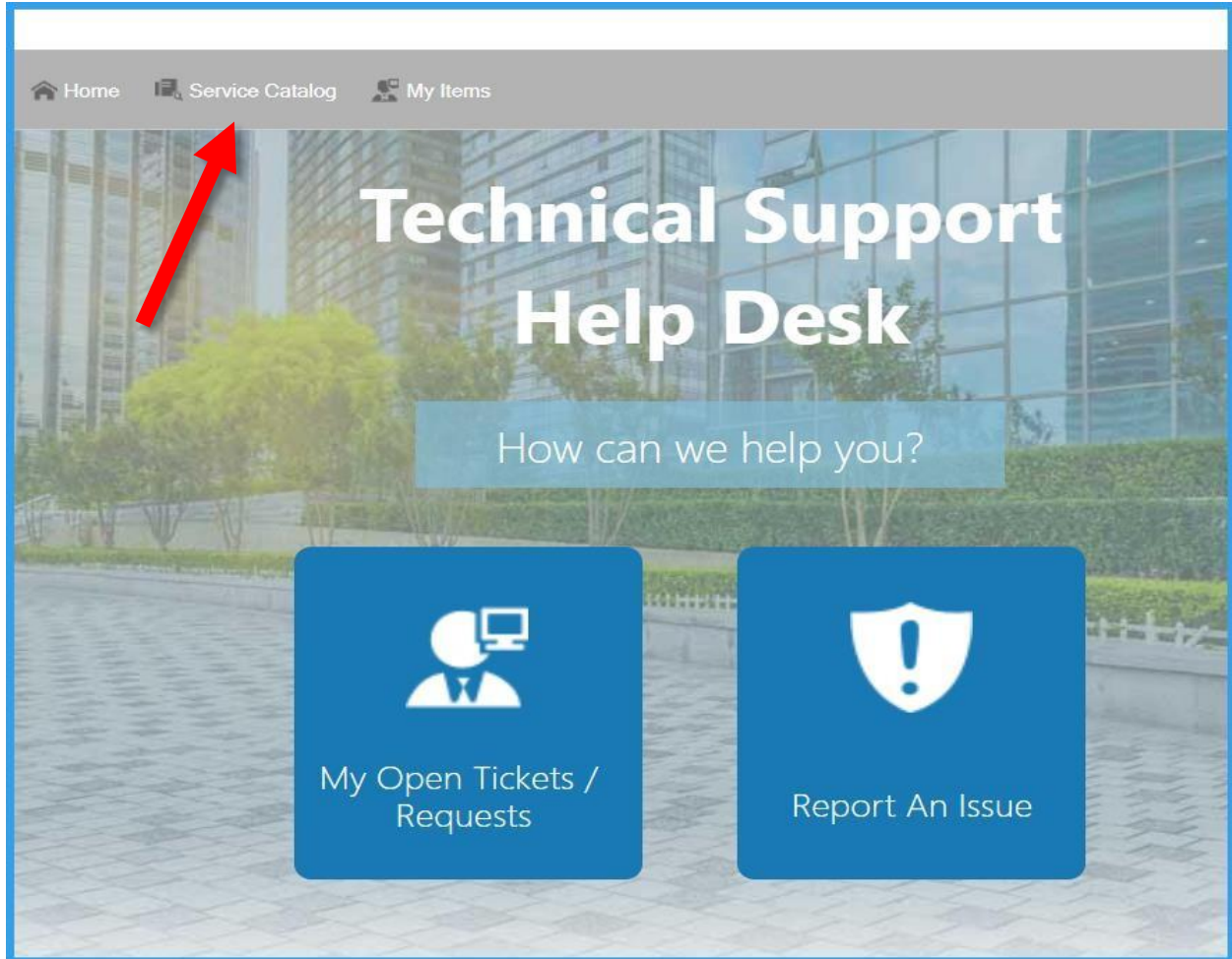
2. The **Service Catalog** will appear with numerous, specific catagories for creating a new Incident Ticket. Two examples are provided below. **Example 1**, focusses on the category, **Presentation Equipment**. **Example 2**, focusses on the category, **Desktop Management**.
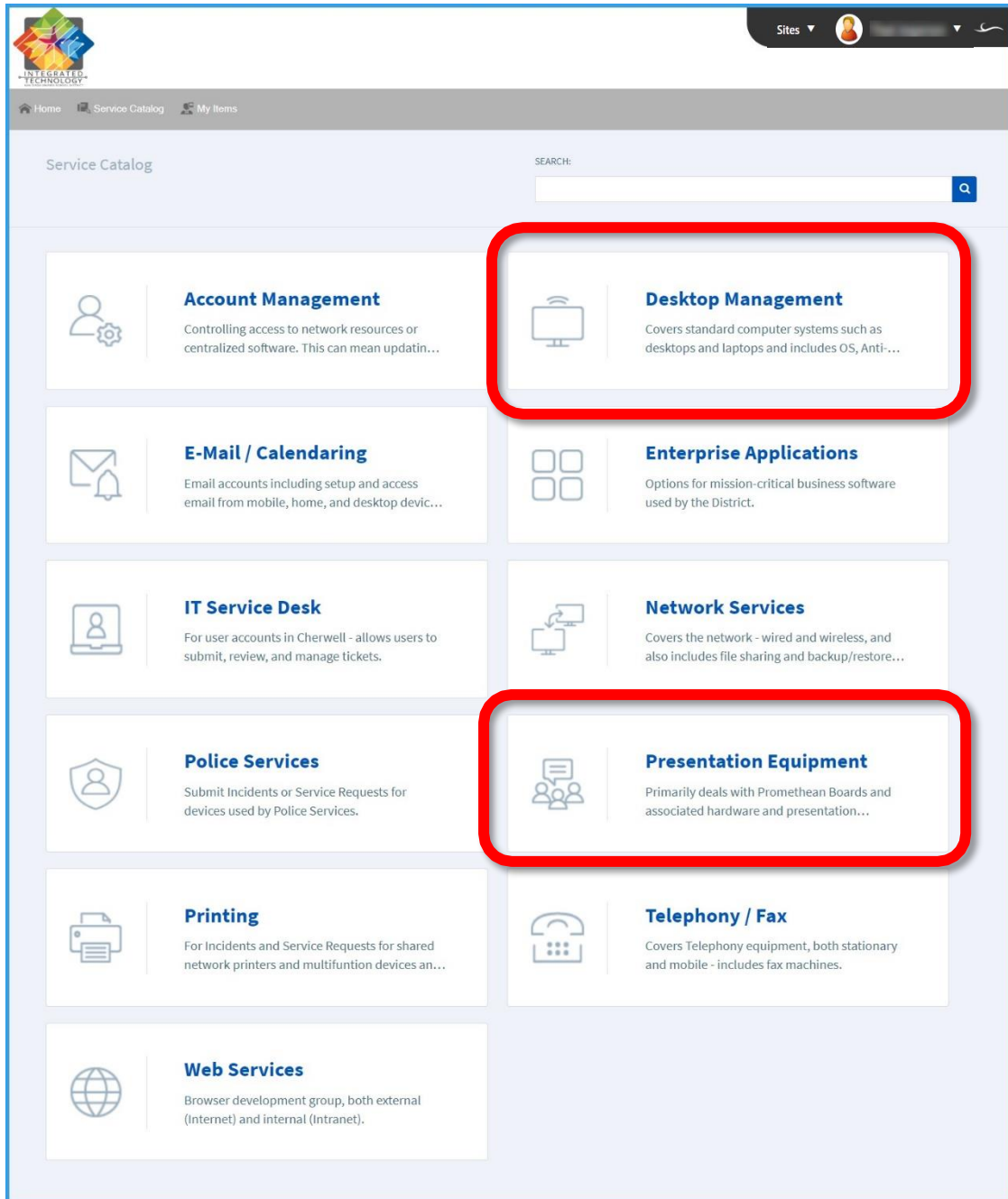
Note: When you select one of the **Service Catalog** categories, additional, more specific selections *(related to that category)* will display. This method of creating a more specific Incident Ticket enables **SDCS Technical Support** to expedite your reported issue to qualified support staff.

Example 1:

If the issue you wish to report is regarding the performance of your **Promethean Board**, then the service catagory, **Presentation Equipment**, would be the appropriate choice.

A. Click on the service category, **Presentation Equipment**, to reveal more specific selections.
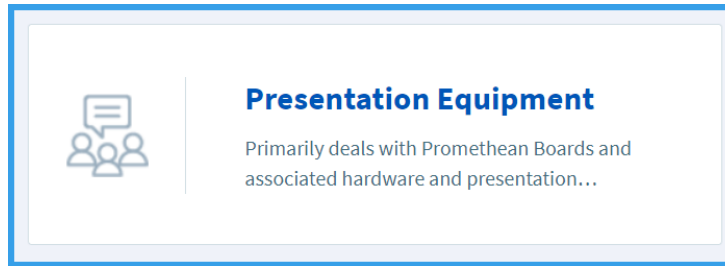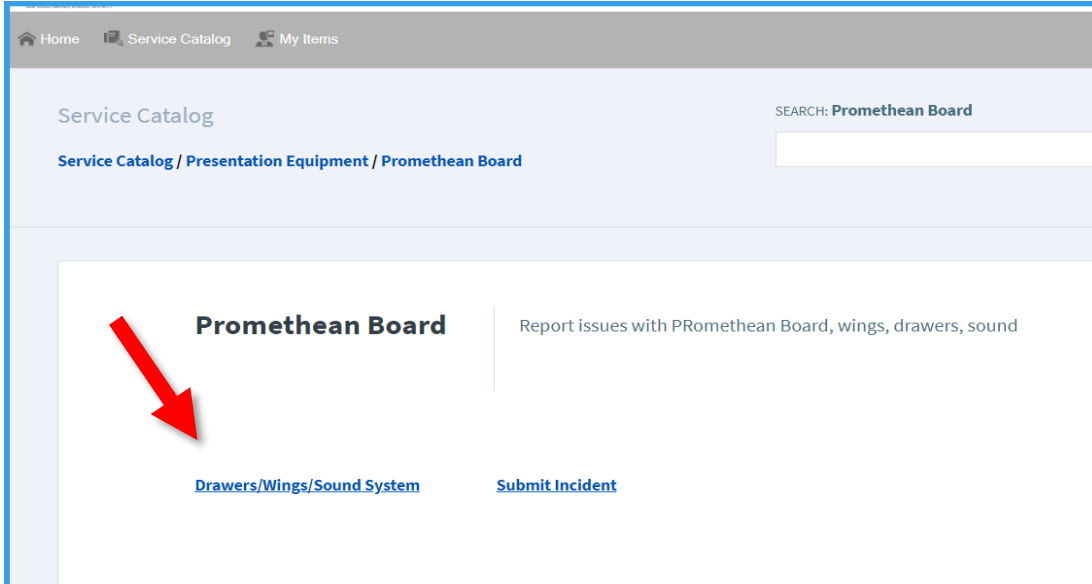
B. The available *(more specific)* selections within the **Presentation Equipment** category will appear. Select the **Promethean Board** option at the bottom, left side of the page.
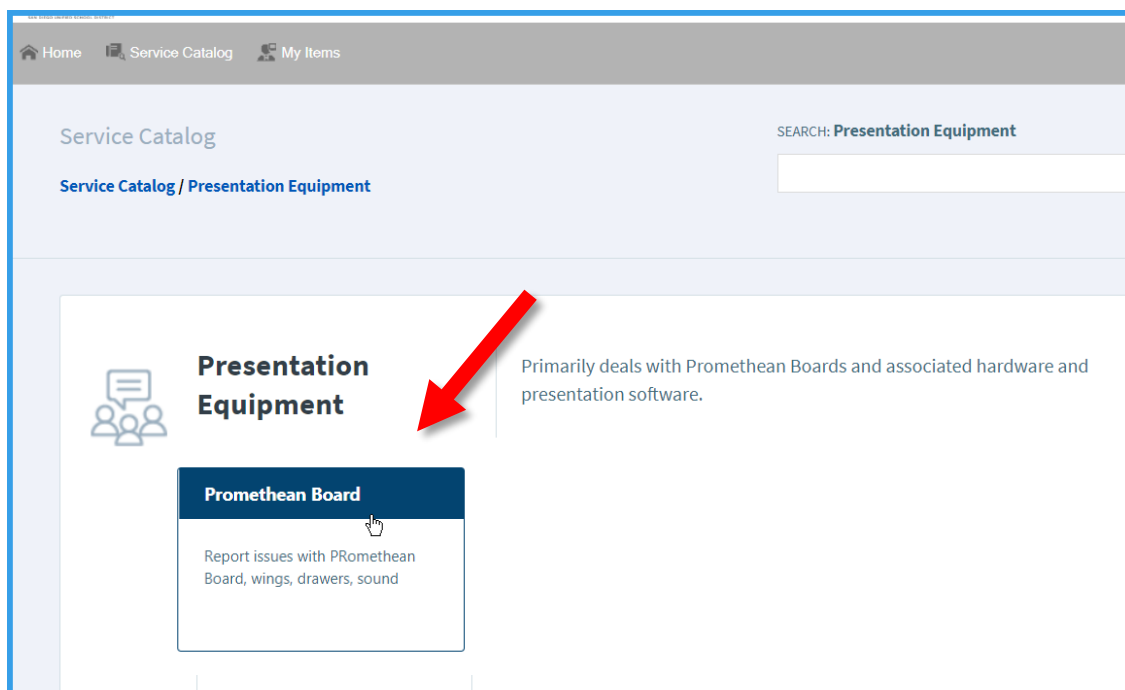
C. The available *(more specific)* selections within the **Promethean Board** category will appear. Next, select the **Drawers/Wings/Sound System** link below to generate a new Incident Ticket.

D. A new Incident Ticket will be generated with its corresponding number. Simply fill in each field accurately and completely and then click, **Submit**.

E. A dialog box will appear indicating that the reported incident was added to the **Cherwell Service Management** system. The process of submitting a request for **Technical Support** is now complete.
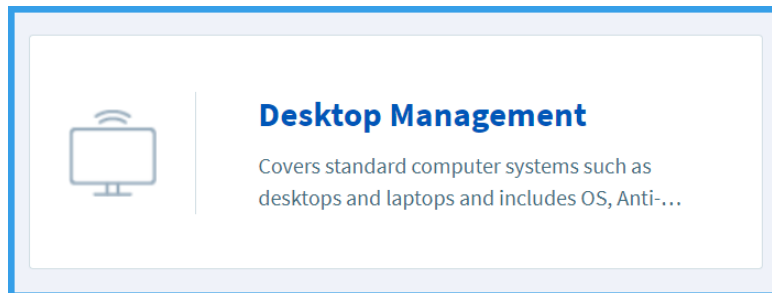
> Your Incident has been added to the Cherwell system. Your Incident ID is 103018.
>
> **OK**

Note: This new Incident Ticket will be sent to **SDCS Technical Support** with a record of the several *(specific)* category selections made during this process. This method of creating an Incident Ticket enables **SDCS Technical Support** to expedite your reported issue to qualified support staff.

Example 2:

If the issue you wish to report is regarding the performance of your **Computer**, then the service catagory, **Desktop Management**, would be the appropriate choice.
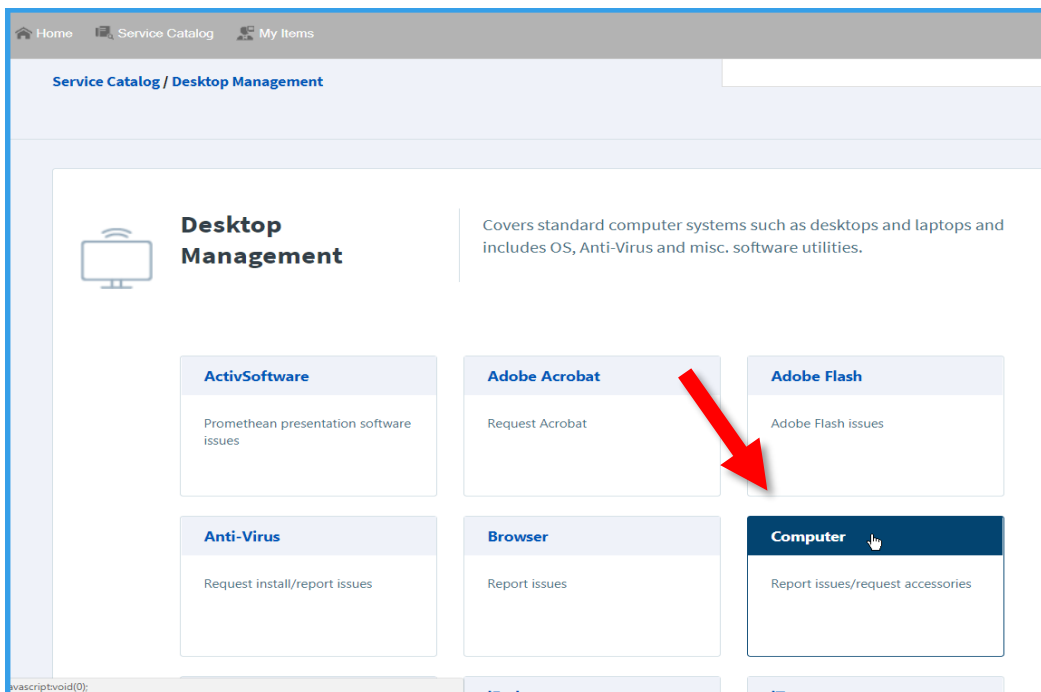
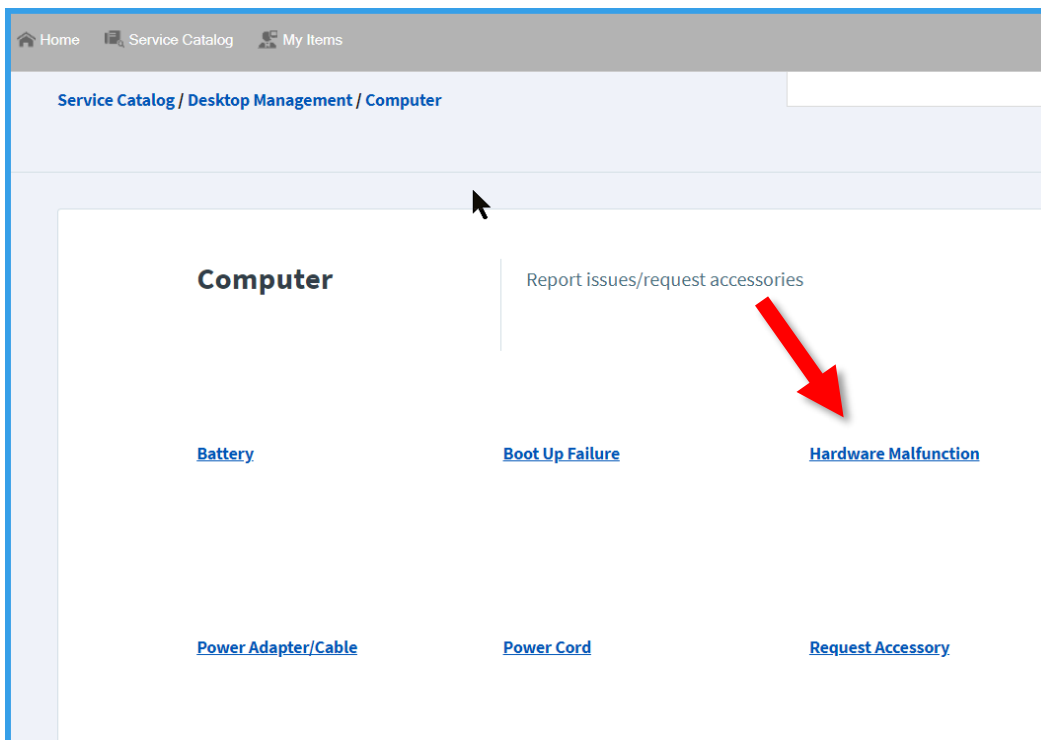A. Click on the service category, **Desktop Management**, to reveal more specific selections.

> **Desktop Management**
>
> Covers standard computer systems such as desktops and laptops and includes OS, Anti-…

B. The available *(more specific)* selections within the **Desktop Management** category will appear. Select the **Computer** option at the bottom, right side of the page.
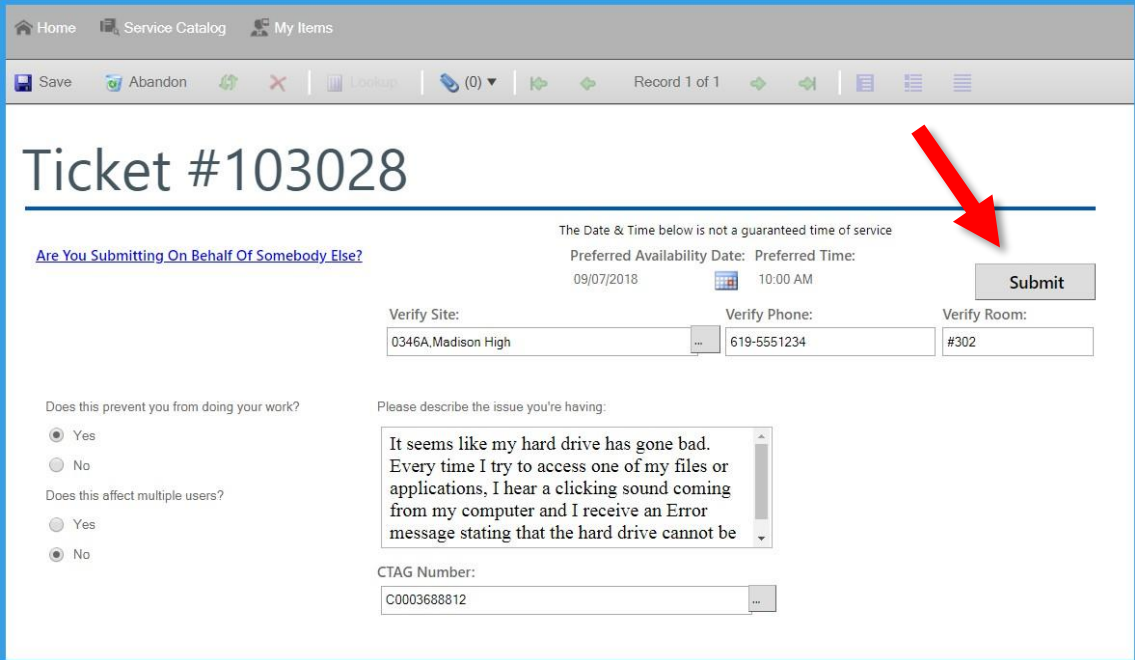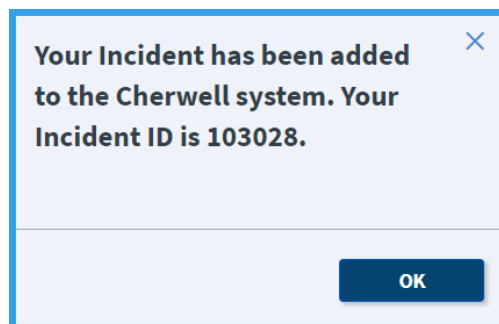

C. The available (more specific) selections within the **Computer** category will appear. Next, select the **Hardware Malfunction** link below to generate a new Incident Ticket.

D. A new Incident Ticket will be generated with its corresponding number. Simply fill in each field accurately and completely and then click, **Submit**.

E. A dialog box will appear indicating that the reported incident was added to the **Cherwell Service Management** system. The process of submitting a request for **Technical Support** is now complete.

Note: This new Incident Ticket will be sent to **SDCS Technical Support** with a record of the several *(specific)* category selections made during this process. This method of creating an incident ticket will enable **SDCS Technical Support** to expedite your reported issue to qualified support staff.