

Using Cherwell for a Terminated Employee



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When an employee separates—or is terminated—from the company, your tasks will depend upon how the employee separates (permanent or temporary), whether the employee has any hardware, and whether the employee has an Active Directory (AD) account.

Human Resources (HR) will inform you of the type of separation in its notice. Using Cherwell, you can automatically create work items for reclaiming hardware and disabling accounts. You’ll also document the actions you took in the work items. Using AD, you can disable network access and give other users proxy access to the former user’s data and email account. If the user is temporarily leaving the company—going on FMLA, for example—you’ll need to “soft disable” the account. If the user is permanently leaving the company, you’ll entirely disable the employee.

This document outlines creating work items, and tasks you need to complete to close the work items.



Prerequisites

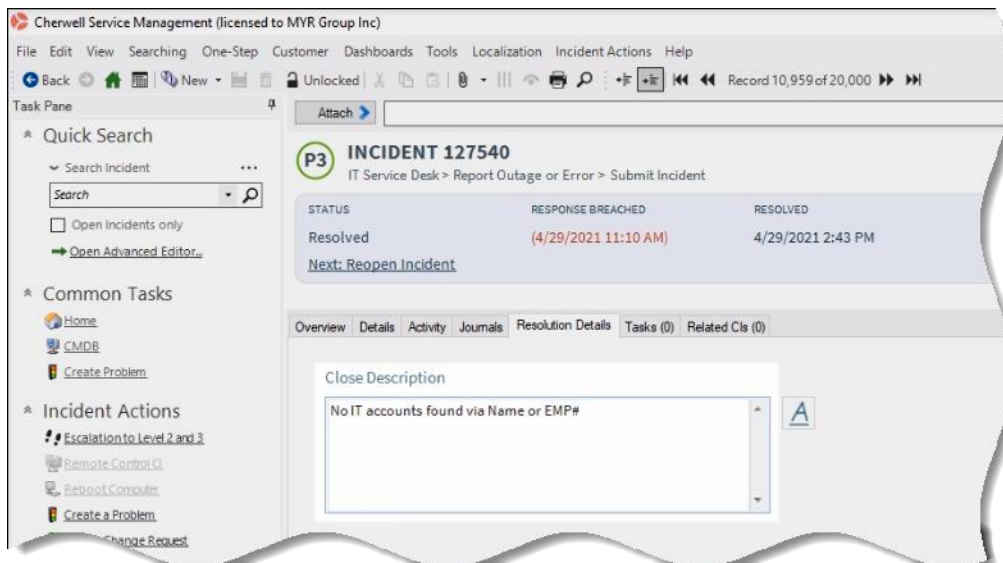
Prerequisites are listed below, along with places where you can find additional information, if available.

Prerequisite	Resources
Access to Cherwell on Desktop team	None
Access to the Term – Change Reason Codes spreadsheet.	None
Access to Active Directory (AD)	None
Member of MYR-DESKTOP-TEAM	File access

First Steps

When HR notifies you of a separation through a ticket in Cherwell, first check AD to see if the user has an account. If the user does not have an account, close the ticket, and enter the following in **Close Description** field:

No IT accounts found via name or EMP#, where [name] is the former user’s name, and [EMP#] is the user’s number.

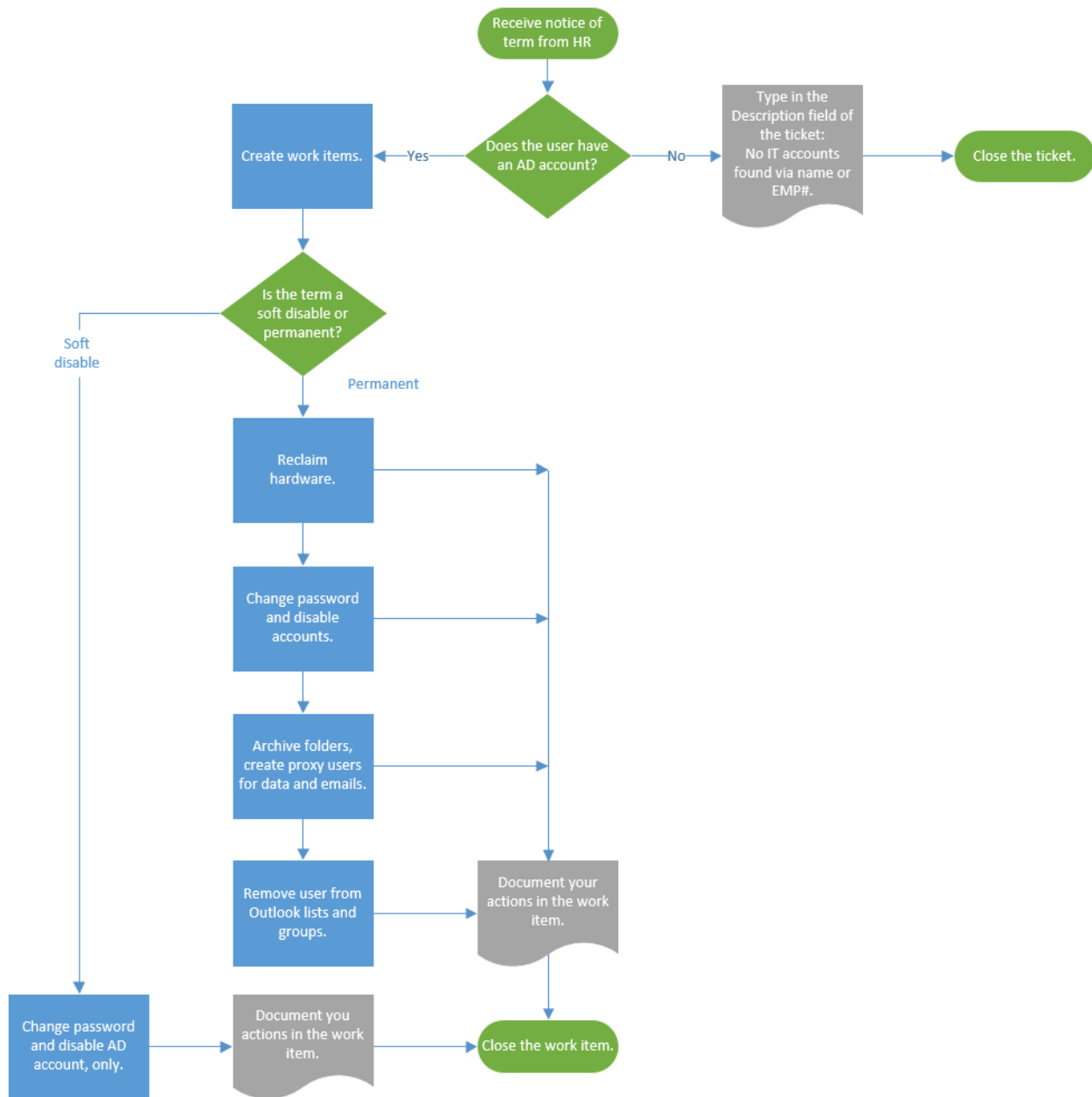


If the user has an account, determine the type of separation by comparing the code in the notice sent by HR with the Access to the Term – Change Reason Codes spreadsheet. If the code indicates a “soft disable,” the user is temporarily going on leave, or is transferring to another location in the company.



In those cases, the user's hardware will remain with the user's department. You'll need to change the user's password, and temporarily disable user's AD account. Proxy users are created only if someone with the appropriate authority requests it.

Termination Process Flowchart

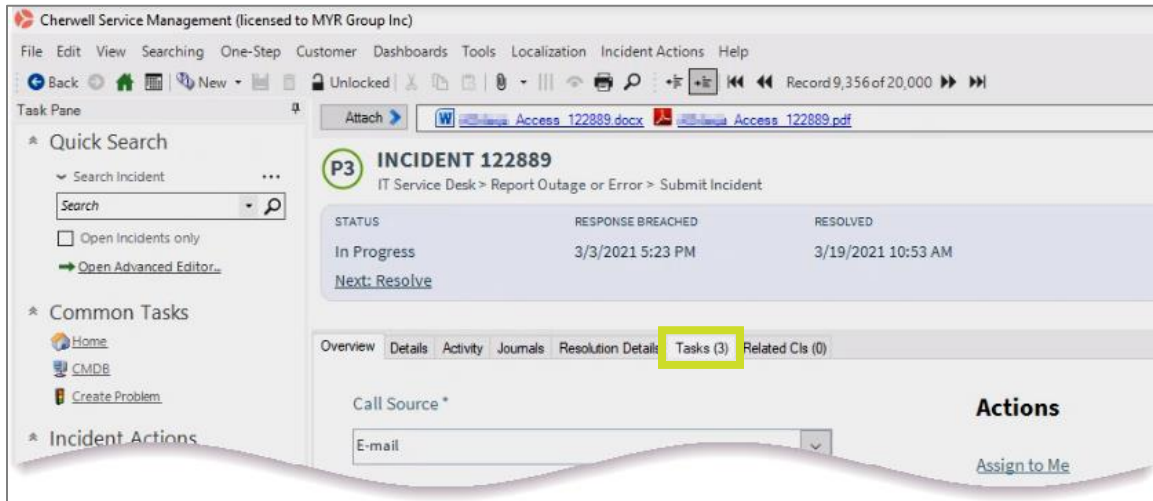




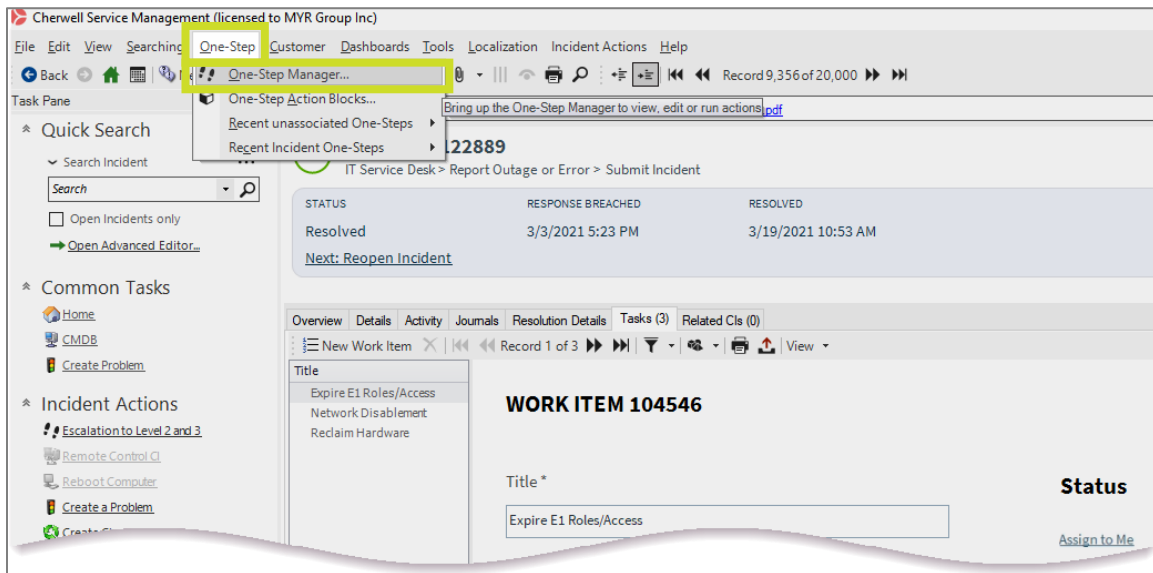
Create Work Items for a Terminated Employee

Follow the steps below to create the IT work items for a terminated employee.

1. In Cherwell, open the ticket for terminating an employee, then go to the **Tasks** tab.



2. In the Tasks tab, click **One-Step** in the menu bar, then select **One-Step Manager** from the list.

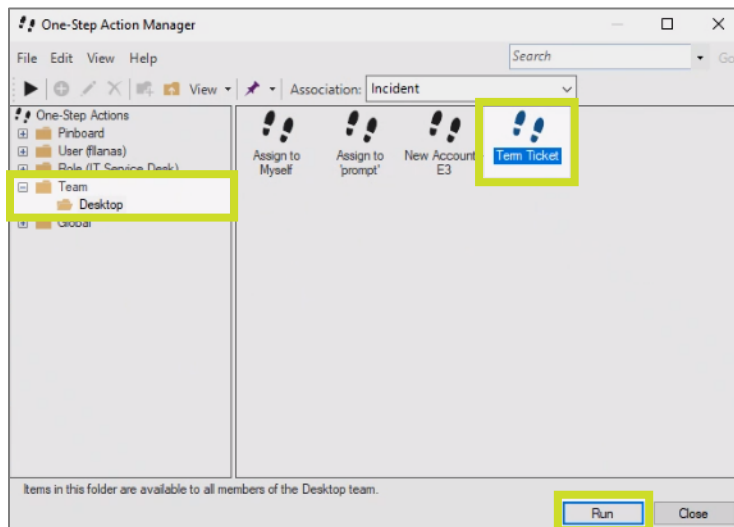




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3. In the One-Step Action Manager window, complete the following steps:

- Ensure the **Teams > Desktop** folders are expanded.
- Click **Term Ticket**.
- Click **Run**.



Cherwell creates the following tasks for the ticket:

- Expire E1 Roles/Access
- Network Disablement
- Reclaim Hardware



The red font indicates that the work item is not assigned to someone for completion.

The screenshot displays the Cherwell Service Management interface. At the top, the title bar reads "Cherwell Service Management (licensed to MYR Group Inc)". The main header includes a navigation menu with "File", "Edit", "View", "Searching", "One-Step", "Customer", "Dashboards", "Tools", "Localization", "Incident Actions", and "Help". Below this is a toolbar with various icons and a status indicator "Record 9,384 of 20,000".

The left sidebar contains several sections: "Quick Search" with a search input and "Open Incidents only" checkbox; "Common Tasks" with links for Home, CMDB, and Create Problem; "Incident Actions" with links for Escalation to Level 2 and 3, Remote Control, Reboot Computer, Create a Problem, Create Change Request, Nominate for XR, and Quick Template; "Queues" with a link for Incident 124188 on New R...; and "Process & Terminology" with a definition of an incident.

The main content area shows "INCIDENT 124188" with a P3 priority. The incident details include: STATUS: Resolved, RESPONSE BREACHED: 3/17/2021 5:41 PM, and RESOLVED: 3/17/2021 5:41 PM. A "Next: Reopen Incident" link is provided.

Below the incident details, a "New Work Item" button is visible. The "WORK ITEM 105003" details are shown, including a title "Expire E1 Roles/Access" (highlighted in red), a description "Please expire the E1 roles/accounts for: JSMITH", and assigned team "ERP Technical". The "Type" is "Work Item".

On the right side, there are sections for "Status" (New), "Actions" (Acknowledge, Assign to Me, Link to Upstream Task, Add a Downstream Task, Visualize Task Dependency Workflow), and "Status" (New, Acknowledge).



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- For each work item, update the **Description** field as needed and assign the work item to a team, as detailed below.

Expire E1 Roles/Access	Network Disablement	Reclaim Hardware
ERP Technical	Desktop	Desktop

The screenshot displays the Cherwell Service Management interface. At the top, the title bar reads "Cherwell Service Management (licensed to MYR Group Inc)". The main header shows "INCIDENT 124188" with a "P3" priority indicator and the description "IT Service Desk > Report Outage or Error > Submit Incident". Below this, a table shows the incident's status: "Resolved" on "3/17/2021 5:41 PM".

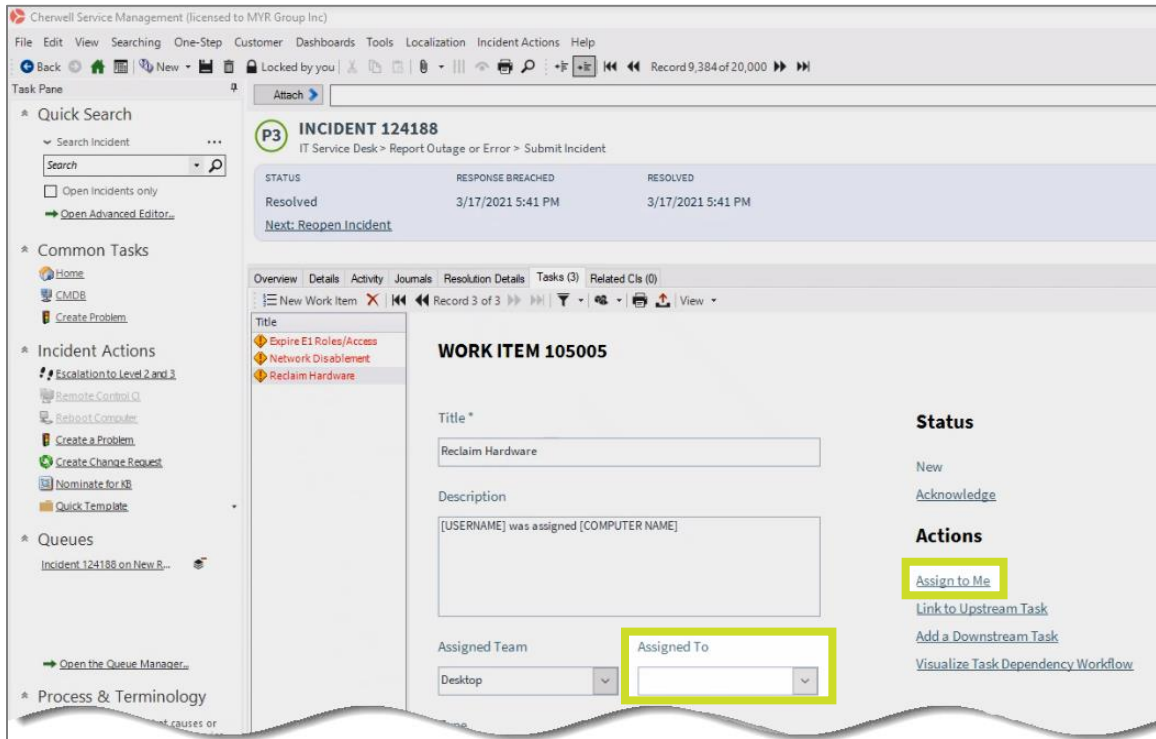
The central part of the interface shows a "WORK ITEM 105005" form. The "Title" field contains "Reclaim Hardware". The "Description" field is highlighted with a yellow border and contains the text "[USERNAME] was assigned [COMPUTER NAME]". The "Assigned Team" dropdown menu is also highlighted with a yellow border and is set to "Desktop".

On the right side, there are sections for "Status" (with a "New" button and a link to "Acknowledge") and "Actions" (with links for "Assign to Me", "Link to Upstream Task", "Add a Downstream Task", and "Visualize Task Dependency Workflow").

The left sidebar contains various navigation options, including "Quick Search", "Common Tasks", "Incident Actions", "Queues", and "Process & Terminology".



- 5. Assign the work item to the appropriate individual. Click **Assign to Me** to assign the Network Disablement and Reclaim Hardware work items to yourself, unless the tasks will occur during a time when you are unavailable. In that case, use the **Assigned To** list to assign them to an available individual.



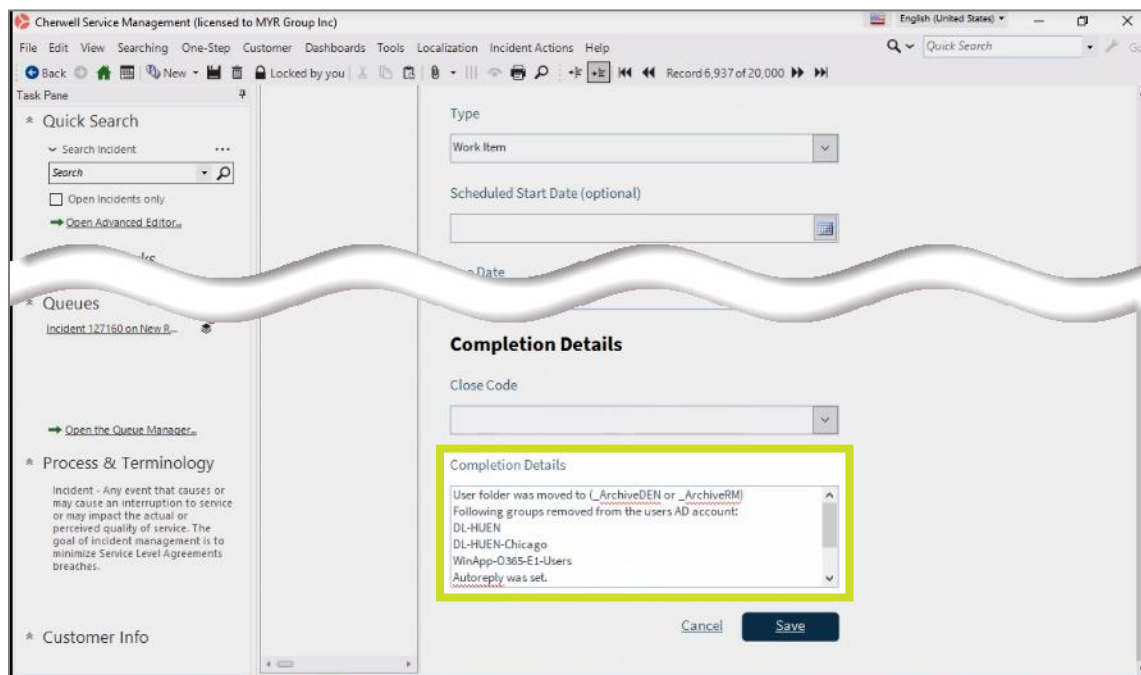
- 6. Click **Save** in the toolbar immediately after making changes.



Complete the Work Items

Follow the steps below to complete the work items for a terminated employee.

Note: Make sure you document all your actions in the **Completion Details** field of the ticket in Cherwell. For more information, see [Close the Work Item](#).

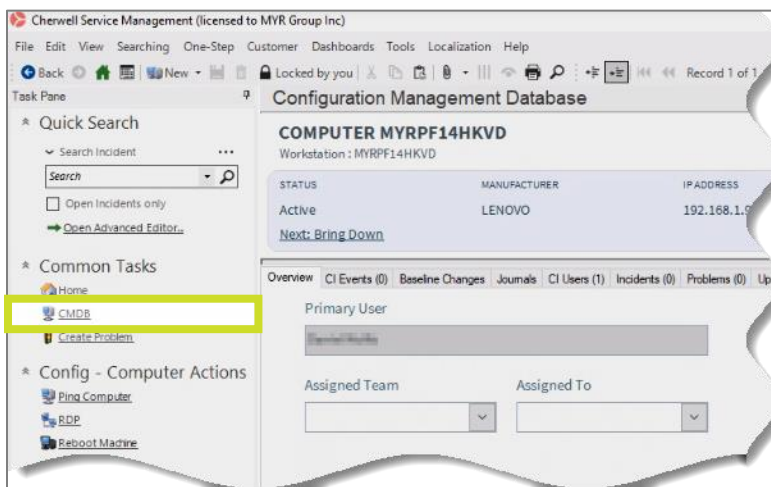




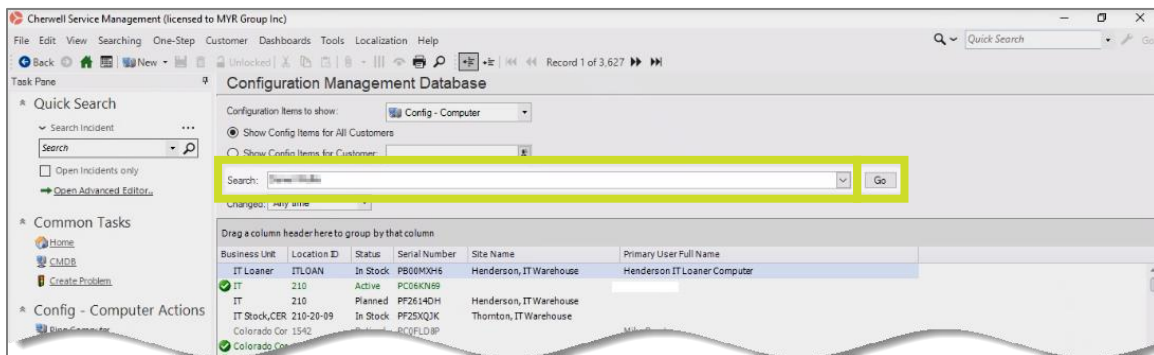
Complete the Reclaim Hardware Work Item

You need to reclaim the former user's hardware only if the user is entirely terminated. You do not need to take any action if you are soft disabling the user.

1. Ask the manager for the former employee's computer.
2. In the Overview tab, click **CMDB** to open the database that tracks what hardware was assigned to users.



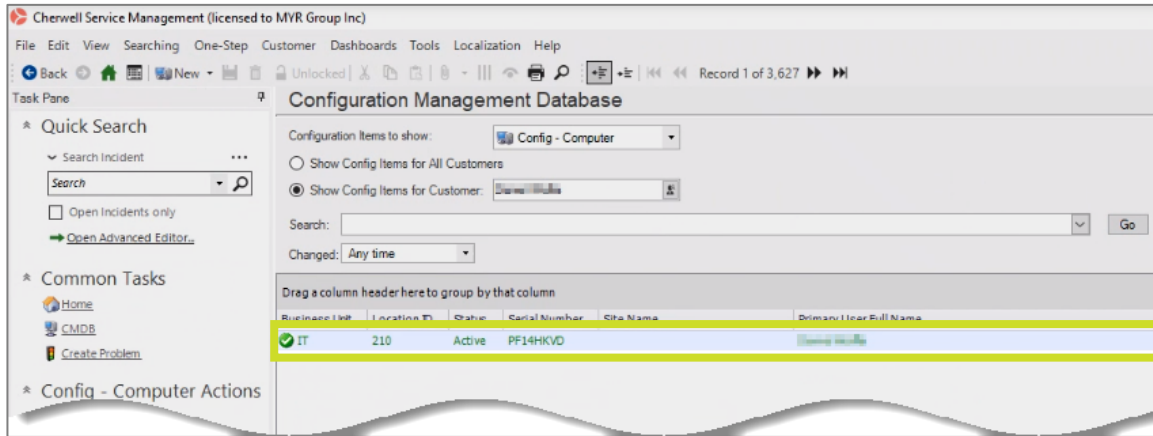
3. Enter the former employee's username in the **Search** field, then click **Go**.



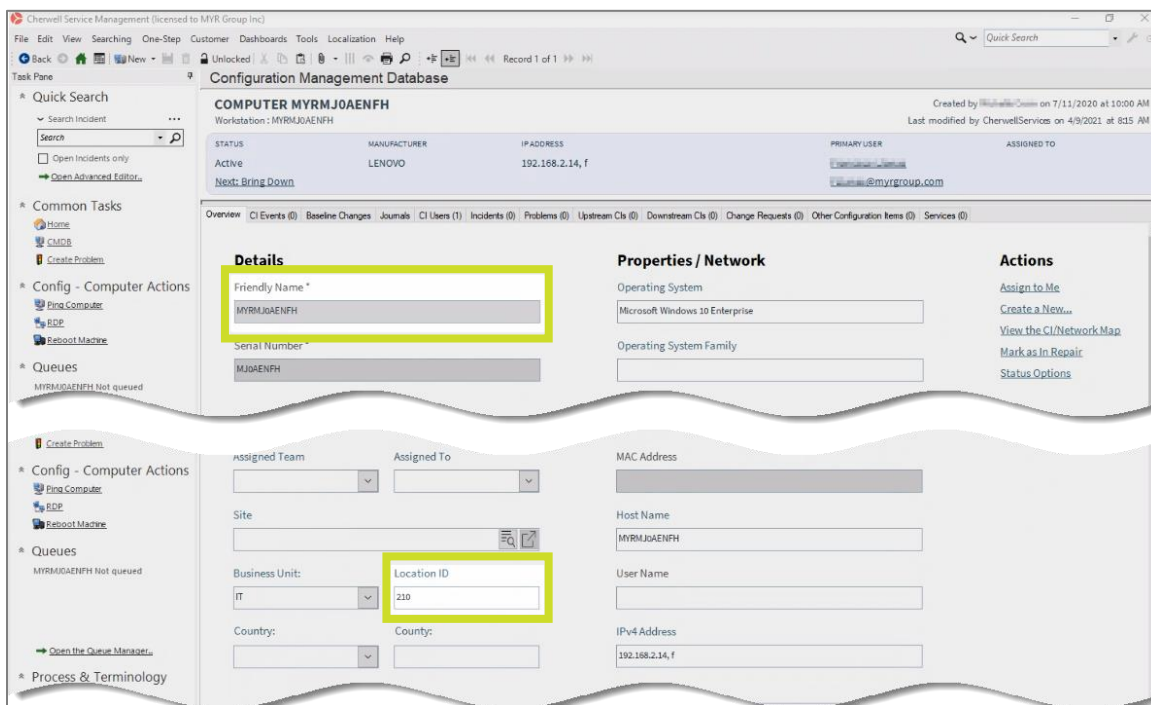


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4. Select the username from the list of results.



5. Make note of the computer's friendly name and the former employee's business unit's location ID.



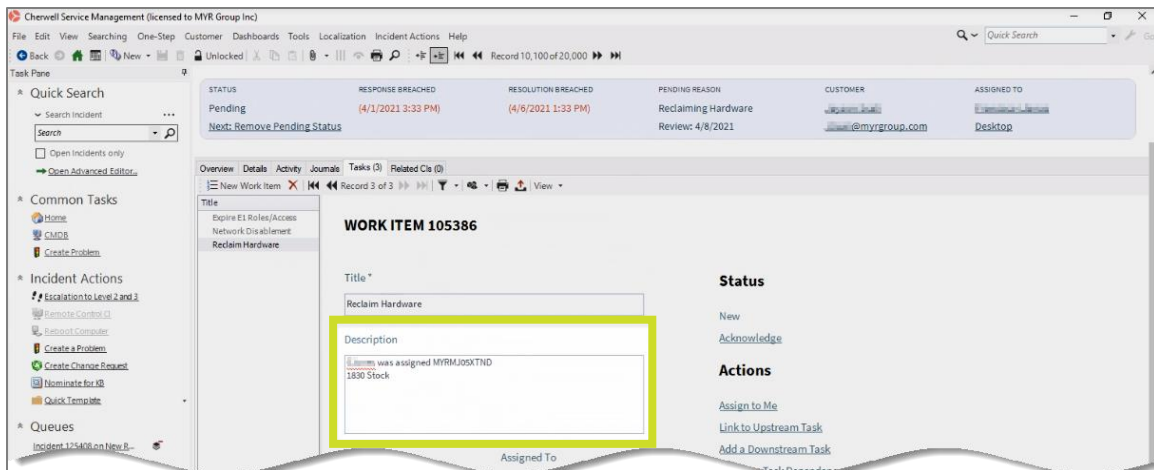


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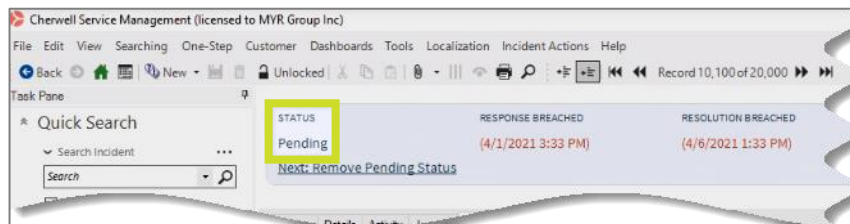
6. Click **Back** to return to the Overview tab in the work item.



7. Add the computer's friendly name and the former employee's business unit's location ID to the **Description** field.

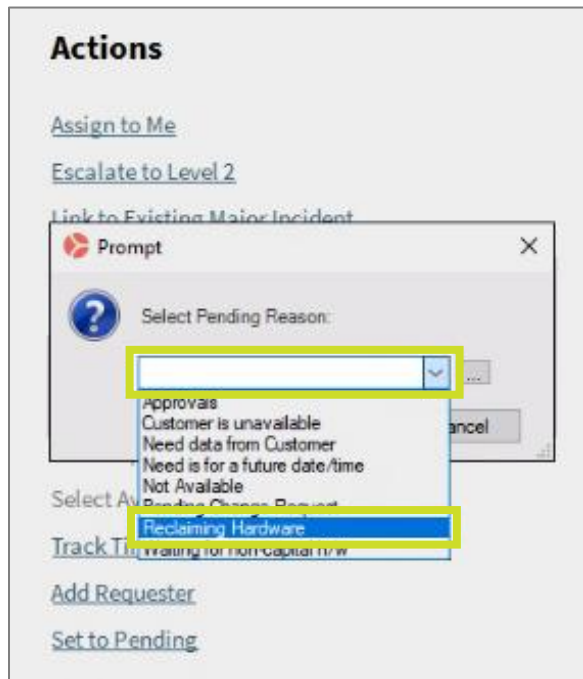


8. Change the work item's status to **Pending**.





- When you are prompted to select a reason for the pending status, select **Reclaiming Hardware**. Then, click **OK**.



- When you receive the computer, label it with its friendly name and the business unit's location ID on a piece of tape.
- Close the work item. See [Close the Work Item](#) for information about this step.



Complete the Network Disablement Work Item

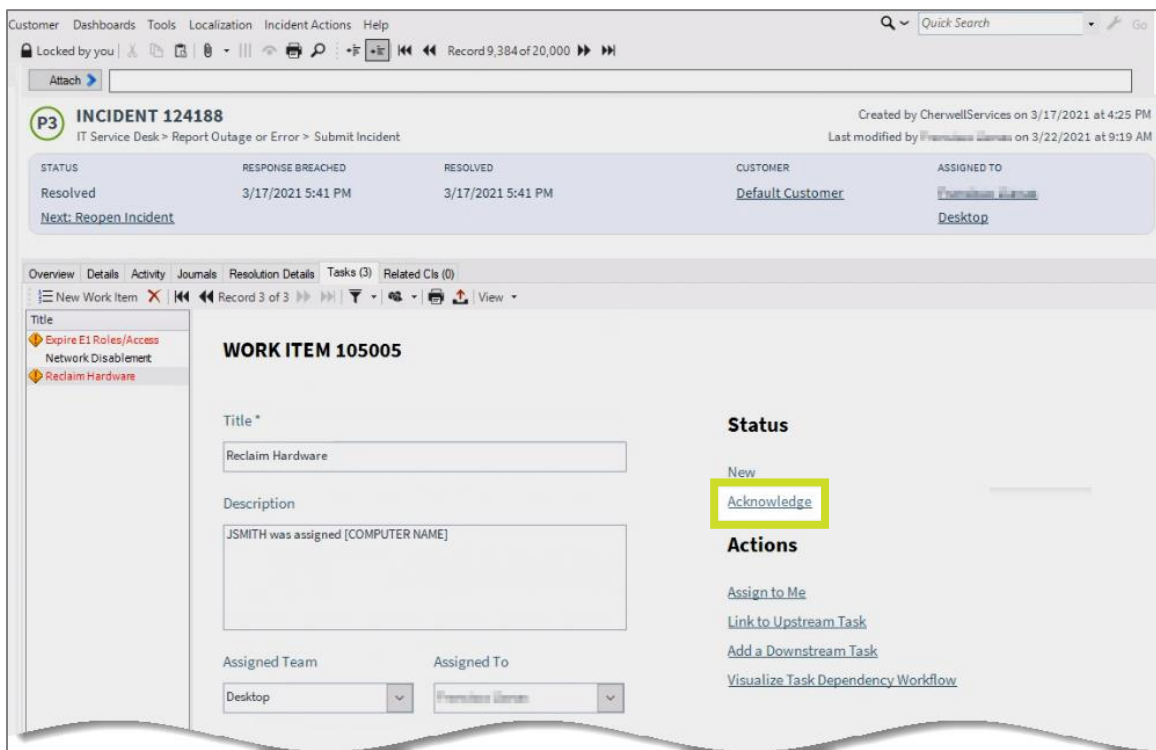
To disable the former user’s network, disable the user’s AD account, and find and archive any of the user’s folders that contain data. Delete empty folders.

Remember to track your progress in Cherwell.

Disable the Former User’s AD Account

Before making changes to the user’s account, update the ticket’s status in Cherwell. Disabling a user’s account involves changing the user’s password, moving their account to the Disabled organizational unit (OU), deleting any mobile numbers, and updating the account’s description.

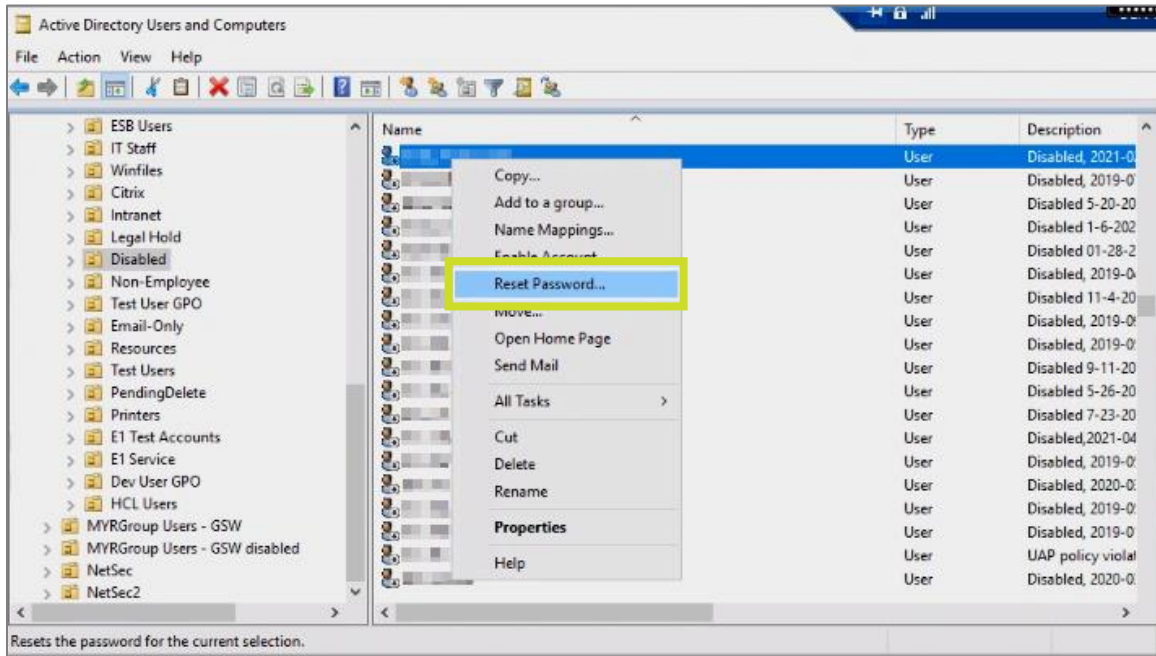
1. In the work item in Cherwell, click **Acknowledge**. The status changes to **In Progress**.



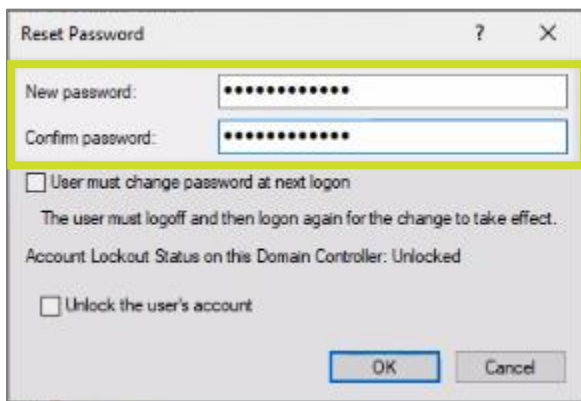
2. Find the user’s AD account. Make sure it matches the employee’s name. If you find a discrepancy, check with the Security Team to determine the correct account name, and to make sure there are not duplicate names.



- 3. In the Active Directory Users and Computers window, begin resetting the former user's password by finding the user, right-clicking the user's name, then selecting **Reset Password**.



- 4. In the Reset Password box, change the **New password** and **Confirm password** fields to **EmpowerHH:MM!**, where HH:MM is in military time.

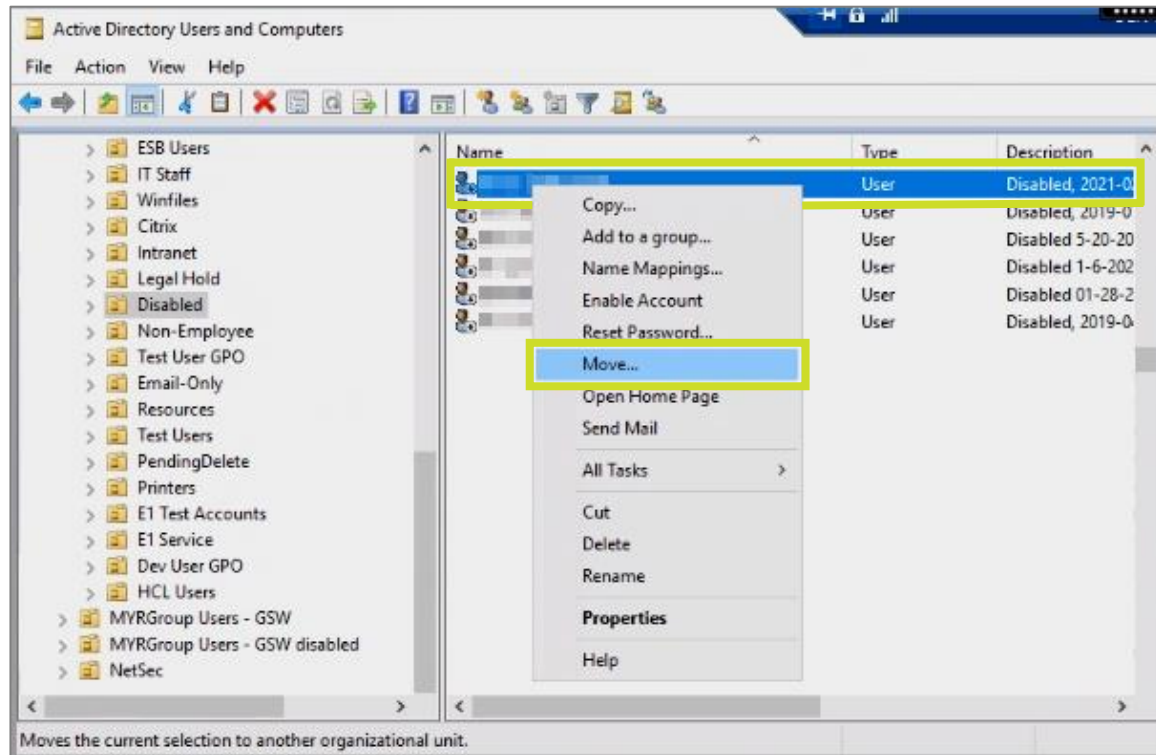




- 5. Clear the **User must change password at next logon** checkbox, then click **OK**.

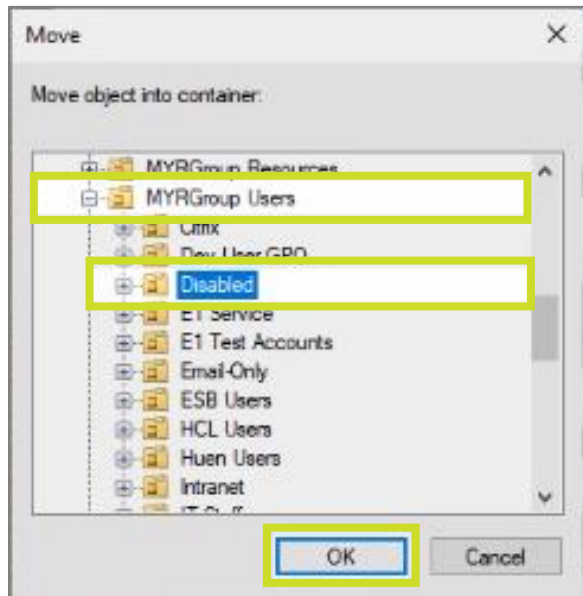


- 6. In the Active Directory Users and Computers window, begin moving the former user's account to the Disabled OU by right-clicking the user's name, then selecting **Move**.





7. In the Move box, select **MYRGroup Users > Disabled**. Then, click **OK**.

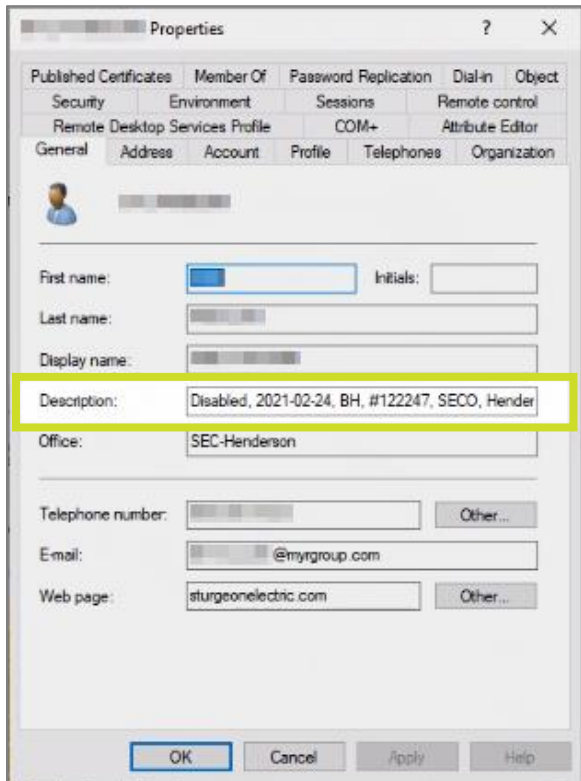


8. In the Active Directory Users and Computers window, click the former user's name to open the Properties window.



9. In the Properties window, update the former user’s account description to: **Disabled, Date [YYYY-MM-DD format], [Tech’s Initials], [Cherwell Ticket #]**.

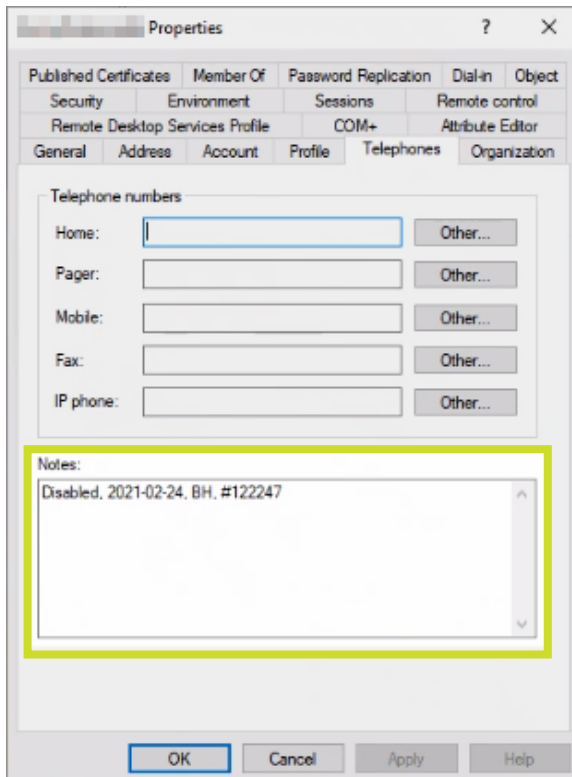
For example: Disabled, 2021-01-01, DA, #123456



10. Copy the text that you just entered in the **Description** field before you click **OK**.
11. Go to the **Telephones** tab.

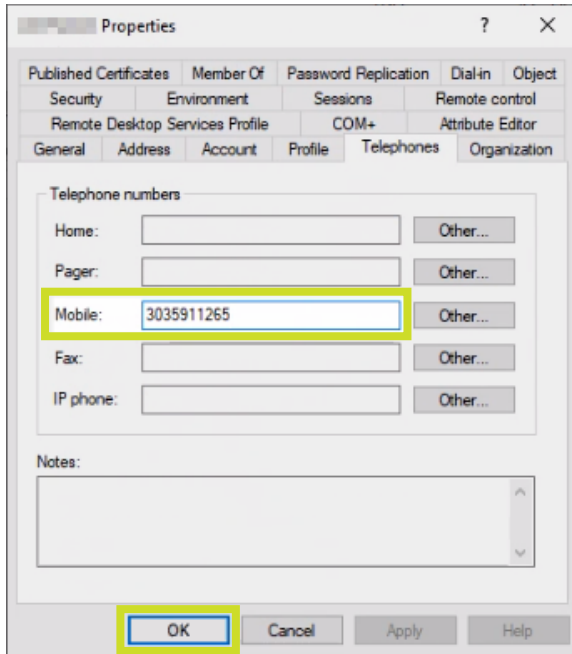


12. Paste the text from the Description field in the Properties window into the **Notes** field in the Telephones tab of the former user's account.





13. Remove any mobile number listed in the terminated user’s profile by deleting the phone number in the **Mobile** field; then click **OK**.



Search for and Archive the Former User’s Folders

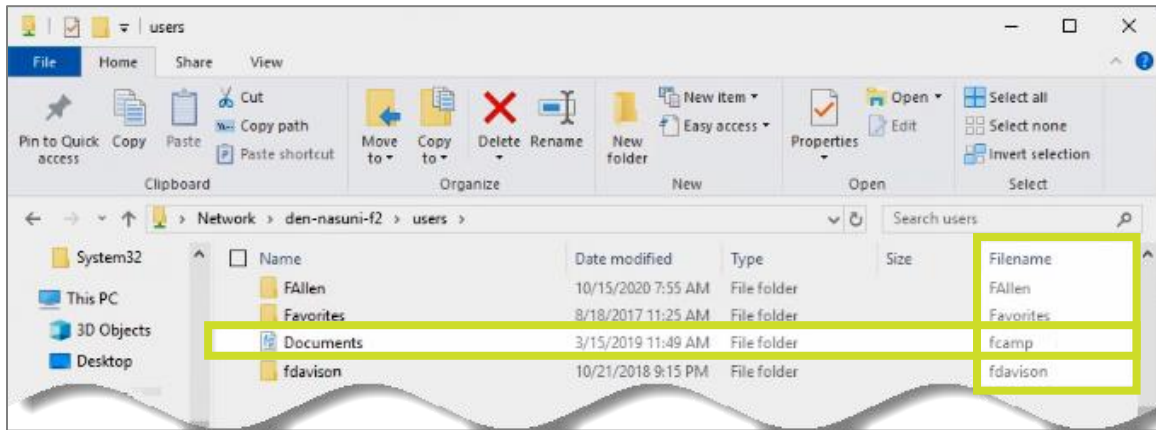
You need to reclaim the former user’s hardware only if the user is entirely terminated. You do not need to take any action if you are soft disabling the user.

1. Using your elevated credentials account, locate the former user’s H: drive folders in File Explorer. The user could have had more than one, so check the following folders:
 - \\den-san1a\Users
 - \\den-san1a\RM_Users
 - \\den-nasuni-f2\Users

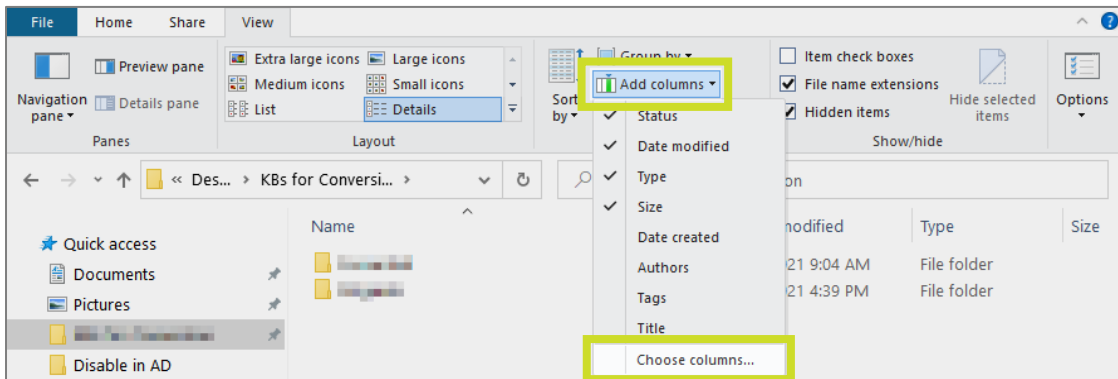
Note: Watch for duplicate folders, or folders named “Documents,” in Nasuni.



- 2. Some folders are called “Documents,” instead of a user’s name. To view the names of users associated with the Documents folders in the Filename column—as shown in the following example—complete the steps below.

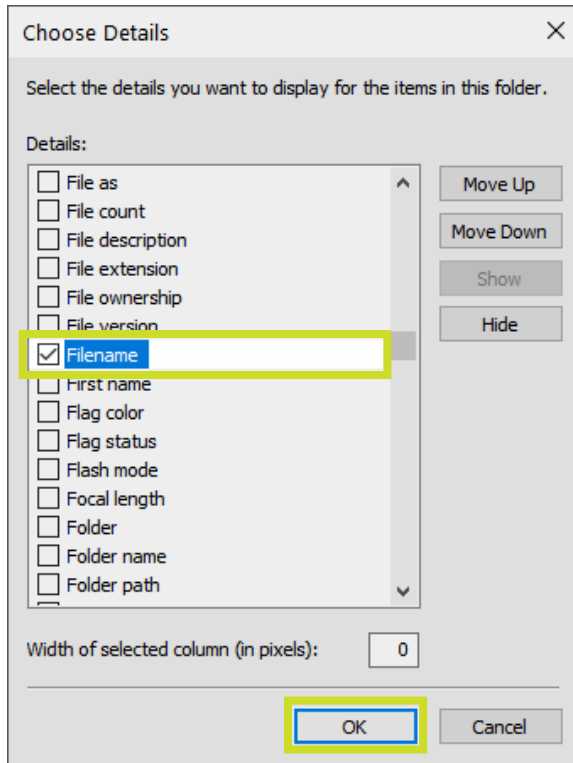


- a. In File Explorer, go to the **View** tab.
- b. In the **Current view** group, click the **Add columns** list, and select **Choose columns** to open the Choose Details window.





- c. Locate and select the **Filename** checkbox; then click **OK**.

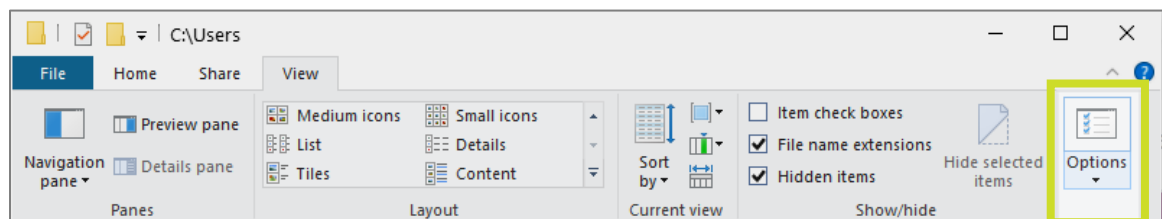


The Filename column now displays in File Explorer, and it lists users' names. It is helpful to sort by the Filename column.

- 3. If the user's folder appears as "Documents," remove the desktop.ini file from the folder to change it to the user's name. If deleting the file doesn't change the name, you'll need to change it manually.

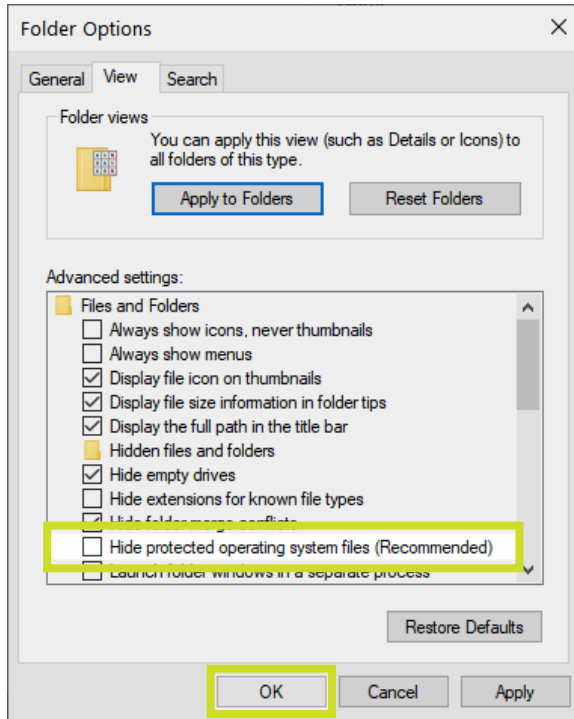
Note: If you can't see the desktop.ini file, complete the steps below.

- a. In File Explorer, click **Options**.





- b. In the Folder Options window, in the View tab, locate and clear the **Hide protected operating system files (Recommended)** checkbox; then click **OK**.



- 4. If the former user’s folders are empty, delete them. Otherwise, rename the folders according to their original location—for example, jsmith.nasuni. If the user had more than one folder in Nasuni, enumerate the folders (for example, jsmith.nasuni1, jsmith.nasuni2, etc.).
- 5. Cut and paste the user’s folders to move them into the corresponding archive folder outlined below, based the user’s geographic location.
 - In the Western US: [\\den-san1a\GroupShares\ ArchiveDEN\ TERM-USERS](#)
 - In the Eastern US: [\\den-san1a\RM_GroupShares\ ArchiveRM\ TERM-USERS](#)

Note: If the user has multiple folders, add one of the following notations to indicate its original location:

- .Nasuni
- .DEN-SAN (for the Users folder on den-san1a)
- .RM-SAN (for the RM_Users folder on den-san1a)



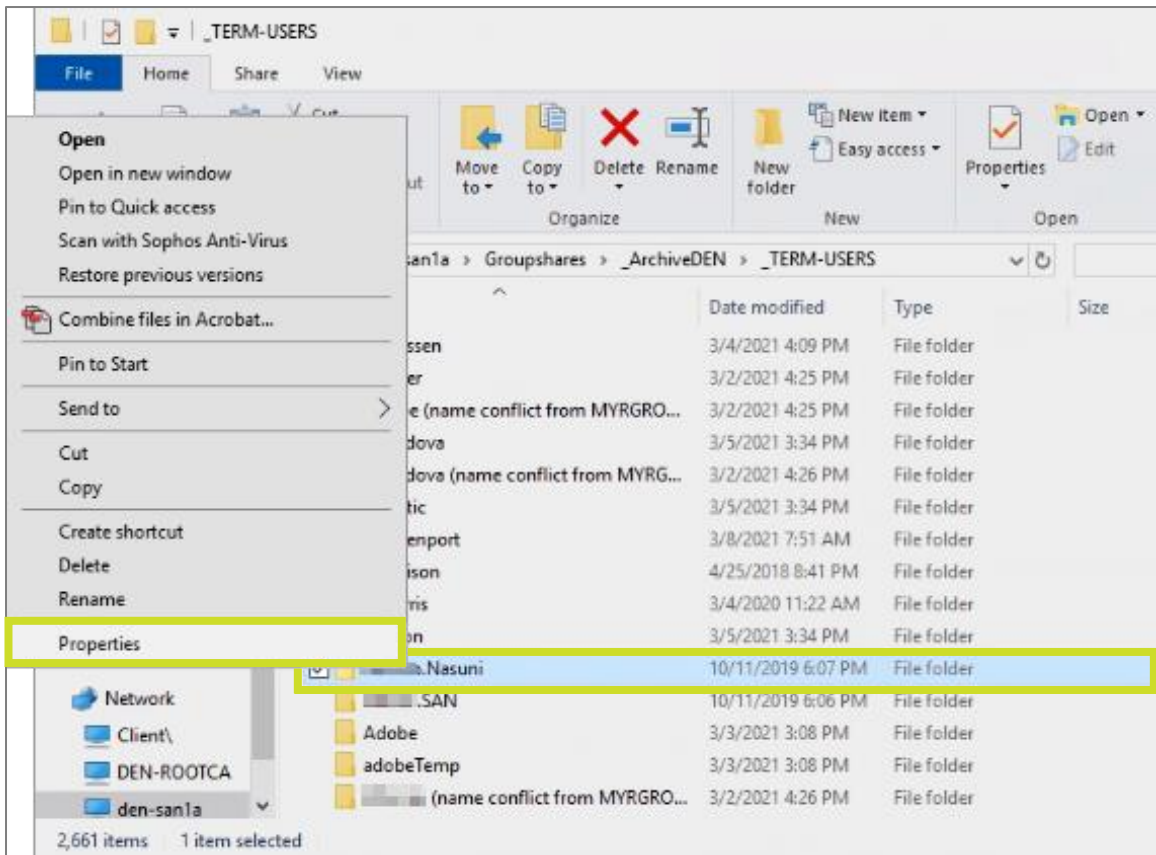
Provide Proxy Users Access to the Former User's Folders

1. If the user's manager asked for access to the former user's folders, or delegates another user, modify the terminated user's folder's permissions to provide the proxy user with read-only access. Complete the following steps:

a. In File Explorer, find the user's folder in its archive location:

- <\\den-san1a\GroupShares\ ArchiveDEN\ TERM-USERS>
- <\\den-san1a\RM GroupShares\ ArchiveRM\ TERM-USERS>

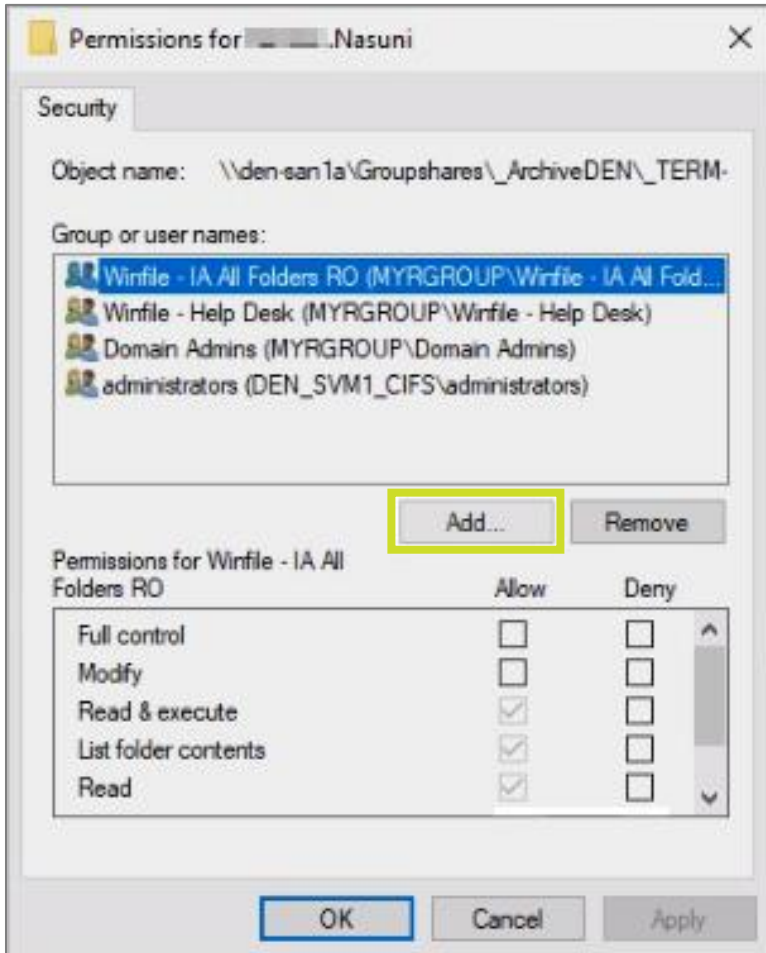
b. Right-click the folder, then select **Properties**.



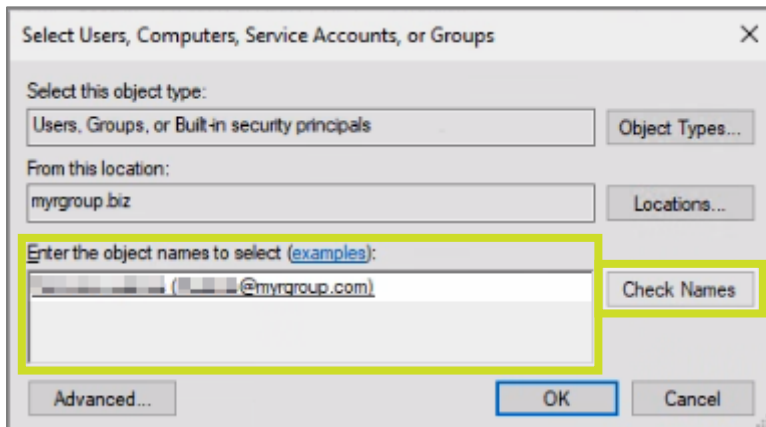
c. In the [Object Name] Properties window, go to the Security tab, and click **Edit**.



d. In the Permissions for [Object Name] window, click **Add**.

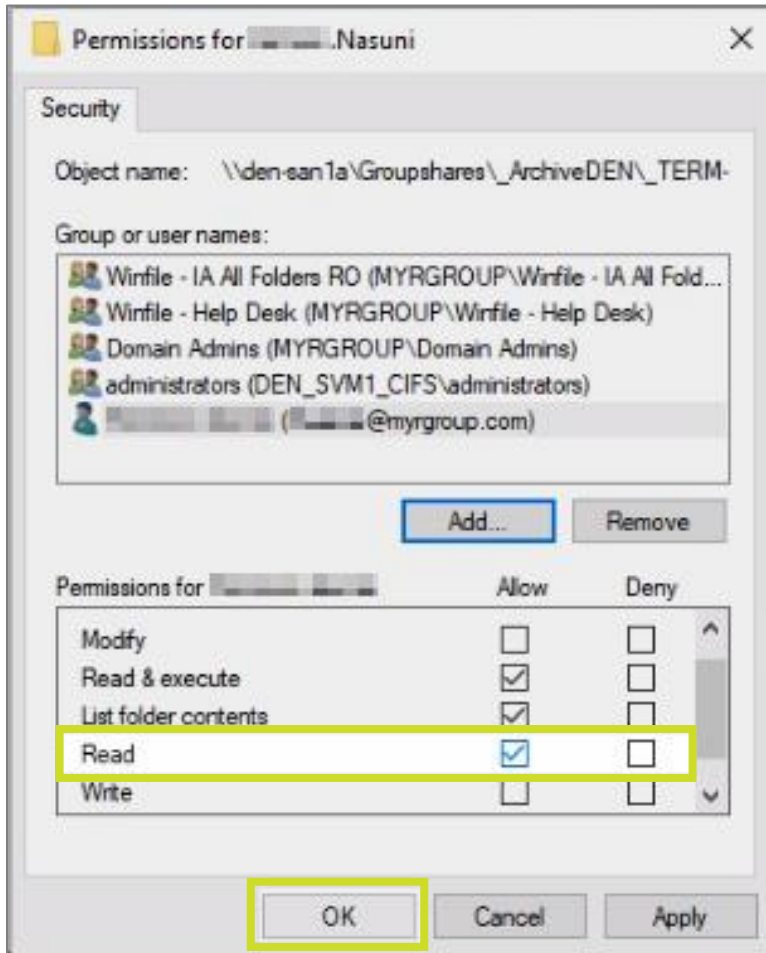


2. Search for the proxy user by entering the proxy user's full name, then clicking **Check Names**.





3. In the Permissions for [Object name] window, make sure the proxy user is selected; then give the proxy user **Read** access, and click **OK**.

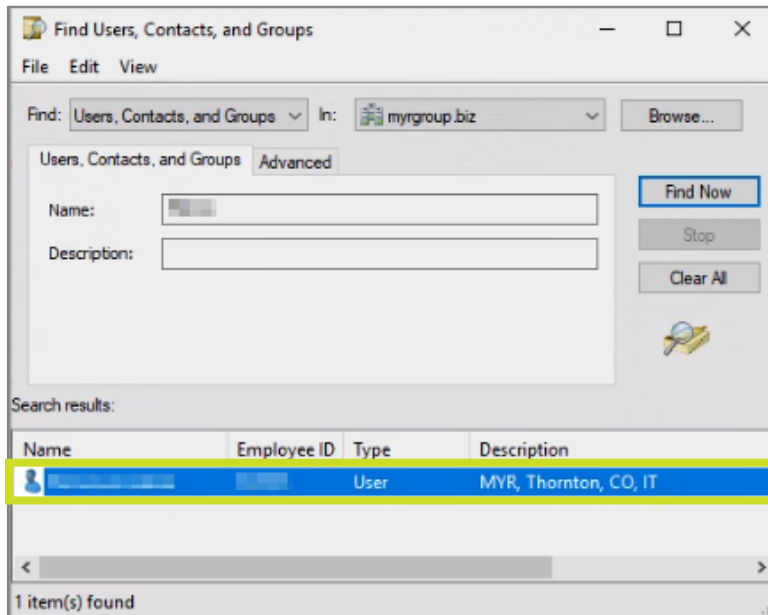


4. Check the proxy user's AD profile to confirm they are a member of one of the following winfile groups—based on the former user's location—to ensure they can access the former user's folders:
 - Winfile - _ArchiveDEN _TERM-USERS
 - Winfile - _ArchiveRM _TERM-USERS



Complete the following steps:

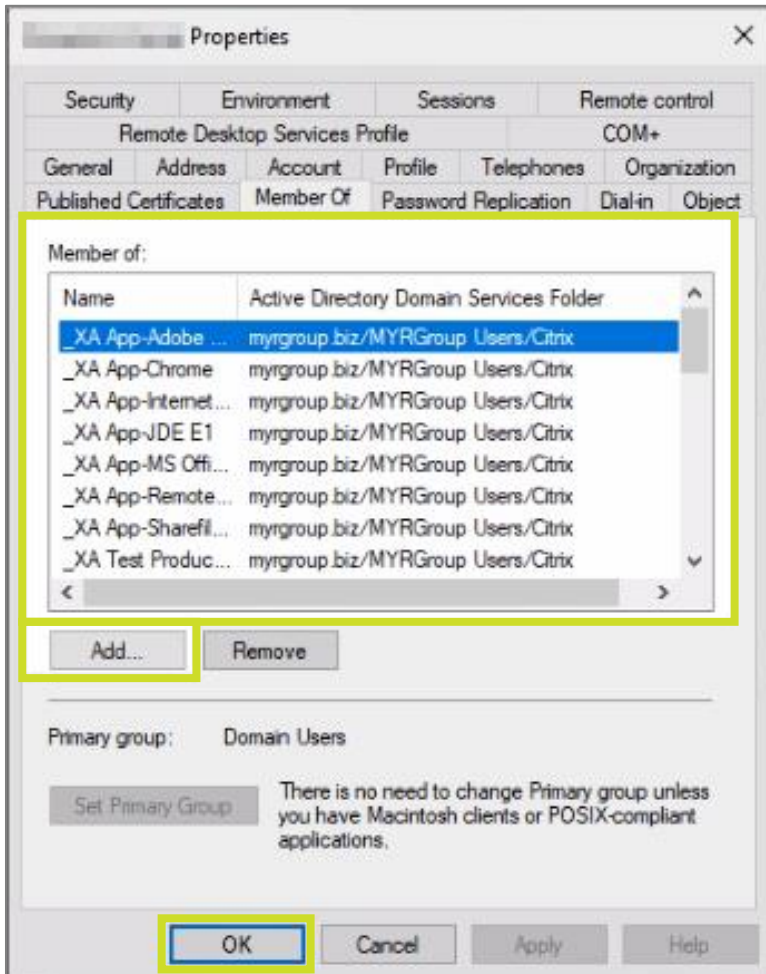
- a. In AD, search for the proxy user. The search results display in the Find Users, Contacts and Groups box.
- b. Click the proxy's name to go to the user's Properties window.





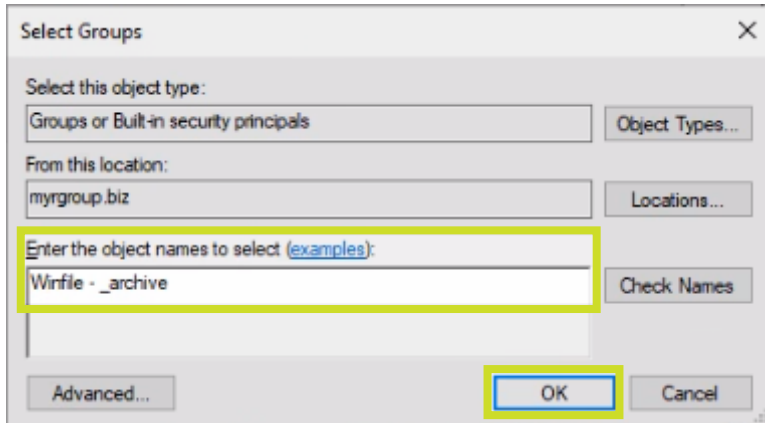
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- c. In the Member Of tab, make sure the proxy user is a member of the appropriate winfile – Archive group (Winfile - _ArchiveDEN_TERM-USERS or Winfile - _ArchiveRM_TERM-USERS). Click **OK** if the user is a member to return to the Permissions for [Object name] window, and proceed to [Step 5](#). Click **Add** if the user is not.

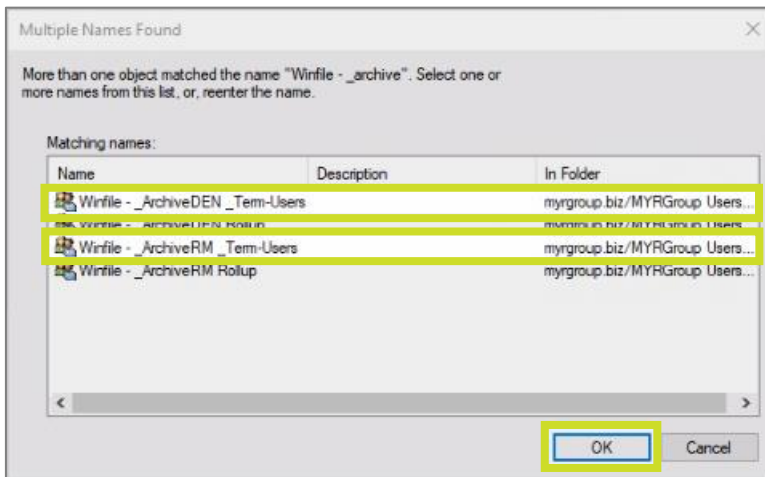




- d. In the Select Groups window, in the **Enter the object names to select** field, type **winfile - _archive**, then click **OK**.



- e. Select the appropriate archive folder in the results; then click **OK** to return to the [Object Name] Properties window.

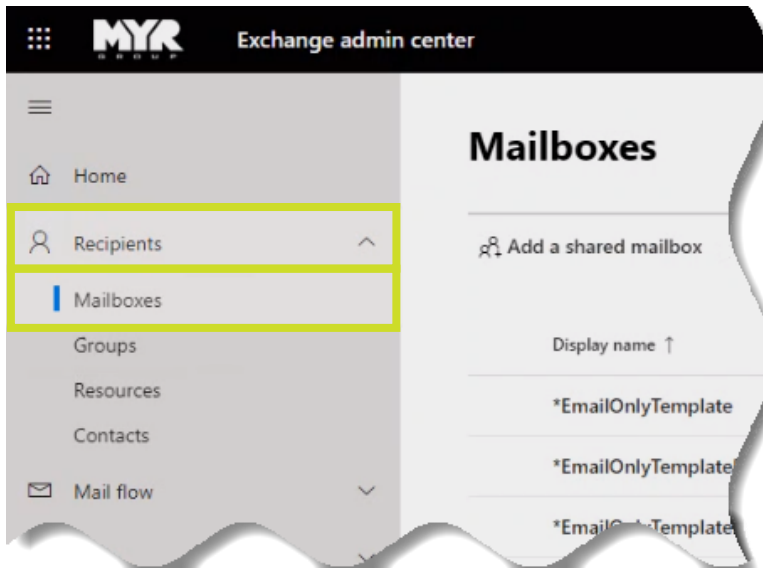


- f. In the [Object Name] Properties window, click **OK**.
5. If the former user’s manager or admin assistant requested access to the user’s OneDrive, create an additional work item in the termination ticket, and assign the work item to Desktop Engineering.



Provide Proxy Users Access to the Former User's Email

1. Go to www.admin.exchange.microsoft.com/#/mailboxes, and log in with your elevated credentials.
2. In the Exchange admin center, go to **Recipients > Mailboxes**.



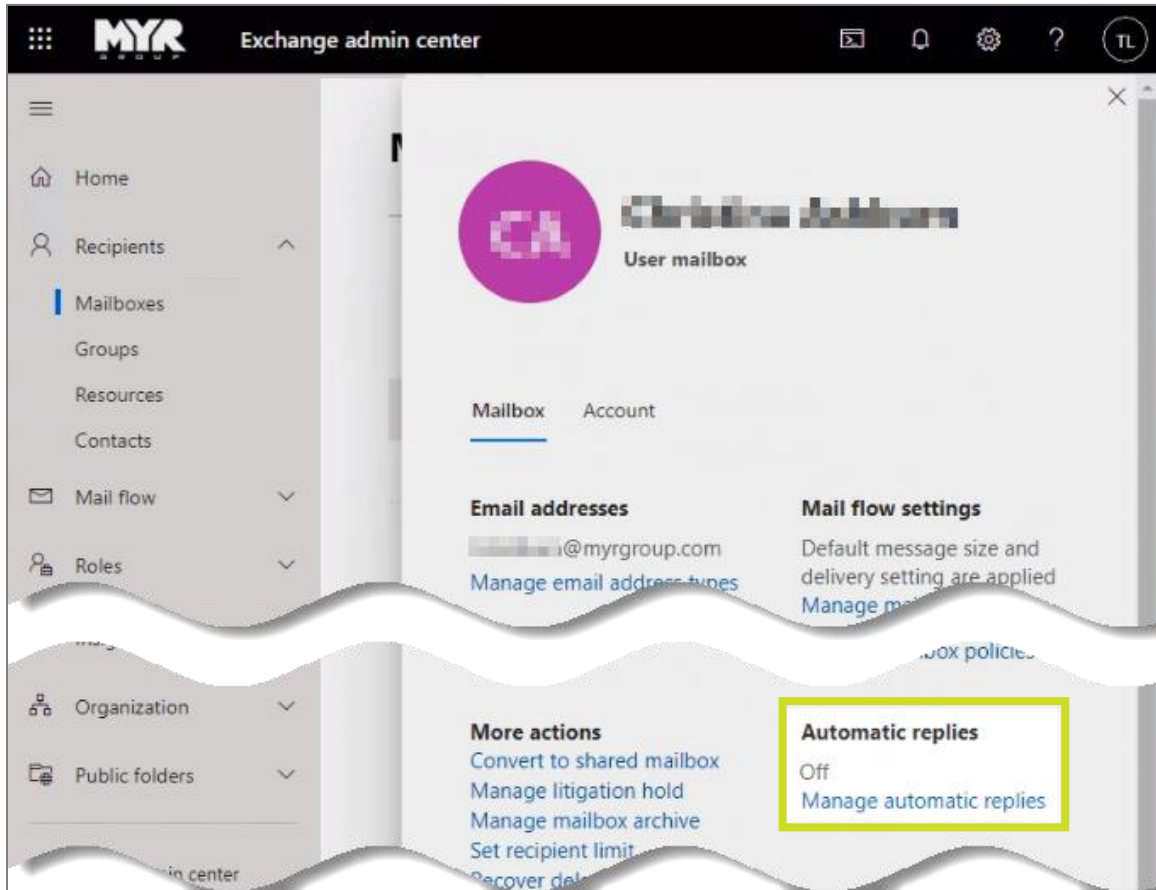
3. Search for the former user by entering the user's name in the **Search** field.



4. Click the user's display name in the search results to display a flyout menu with options for working with the user's mailbox and account.



- 5. On the flyout menu, click **Manage automatic replies**.



- 6. In the Manage Automatic Replies window, complete the following steps:
 - a. Select the following options and checkboxes:
 - i. **Automatic replies**
 - ii. **Send automatic replies to senders outside this organization**
 - iii. **Reply to all senders**

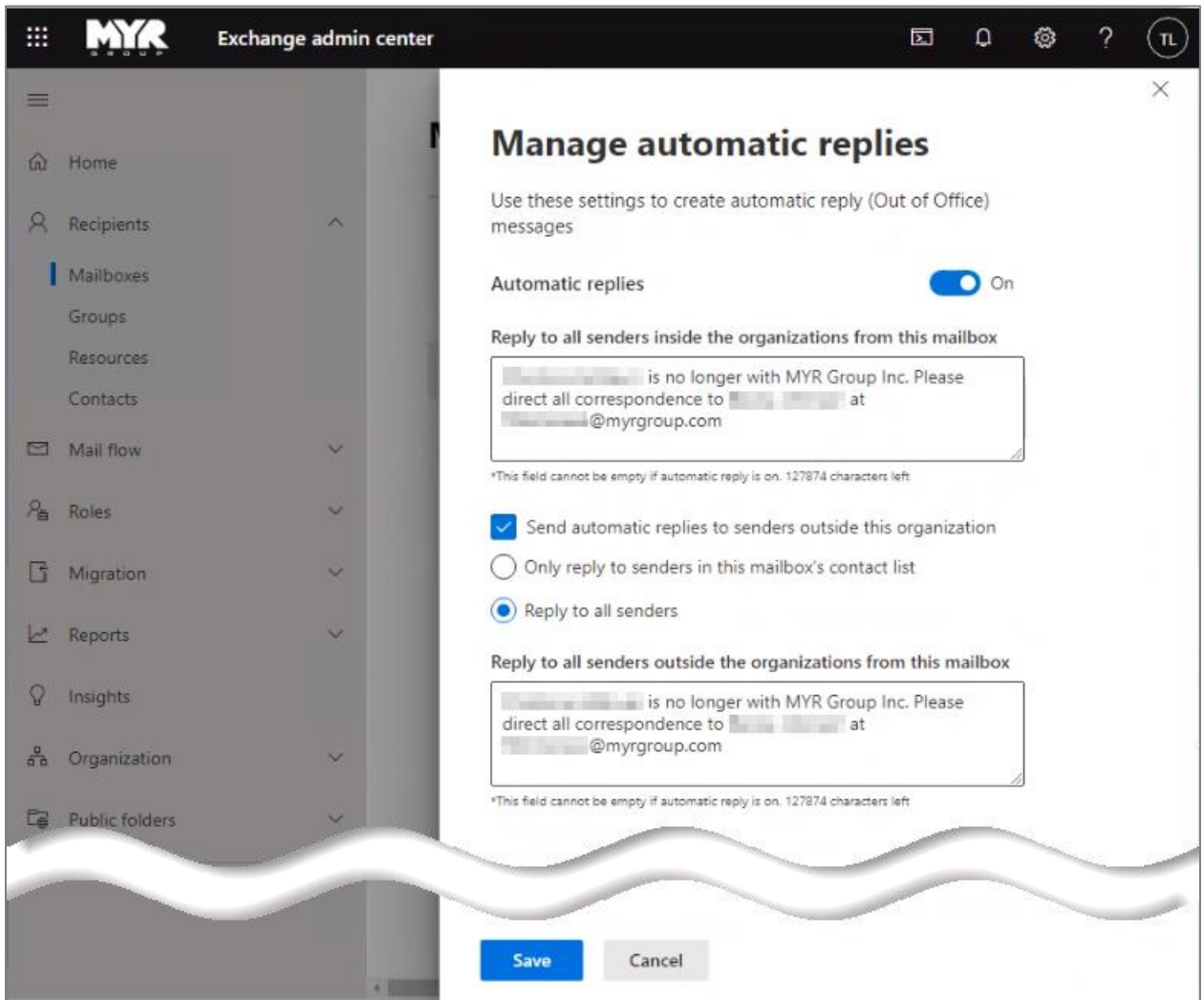


- b. Set both internal and external replies to the following:

“[Term user] is no longer with MYR Group. Please direct all correspondence to [Proxy User] at proxyuser@myrgroup.com”

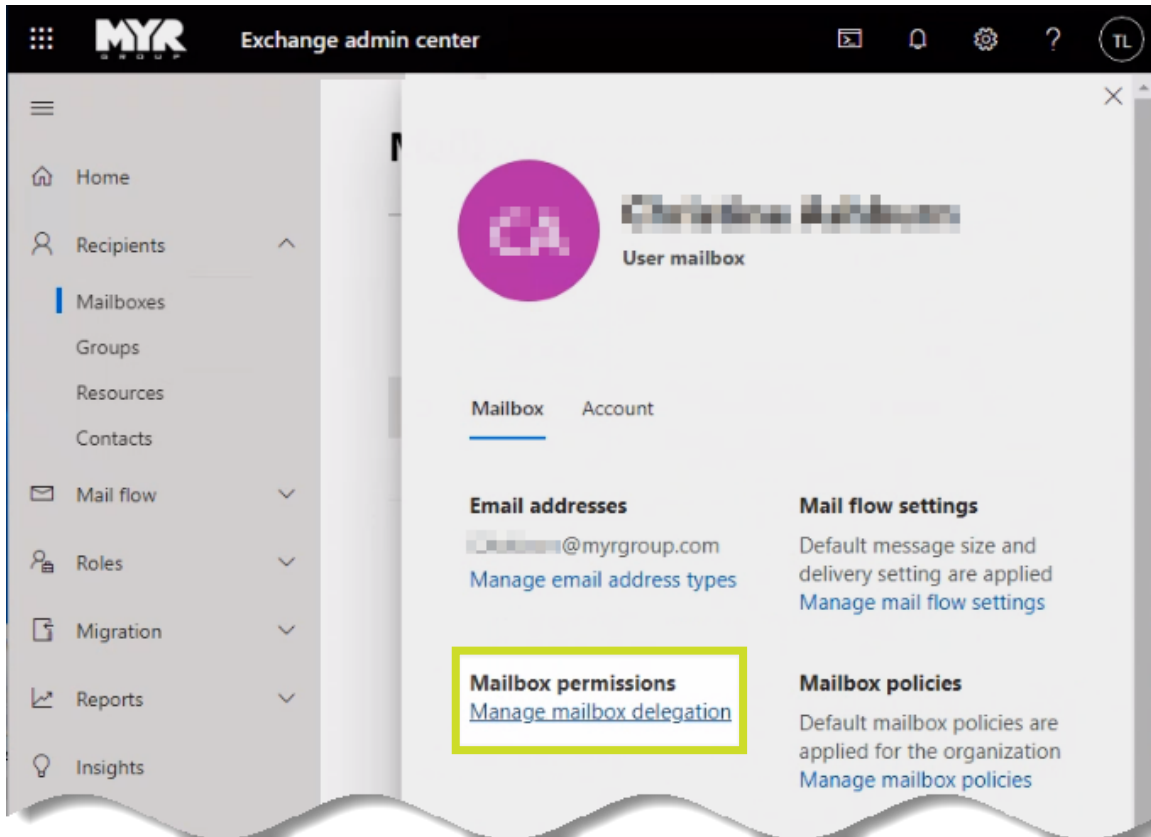
Note: If no proxy is specified, omit the second sentence.

- c. Click **Save**.



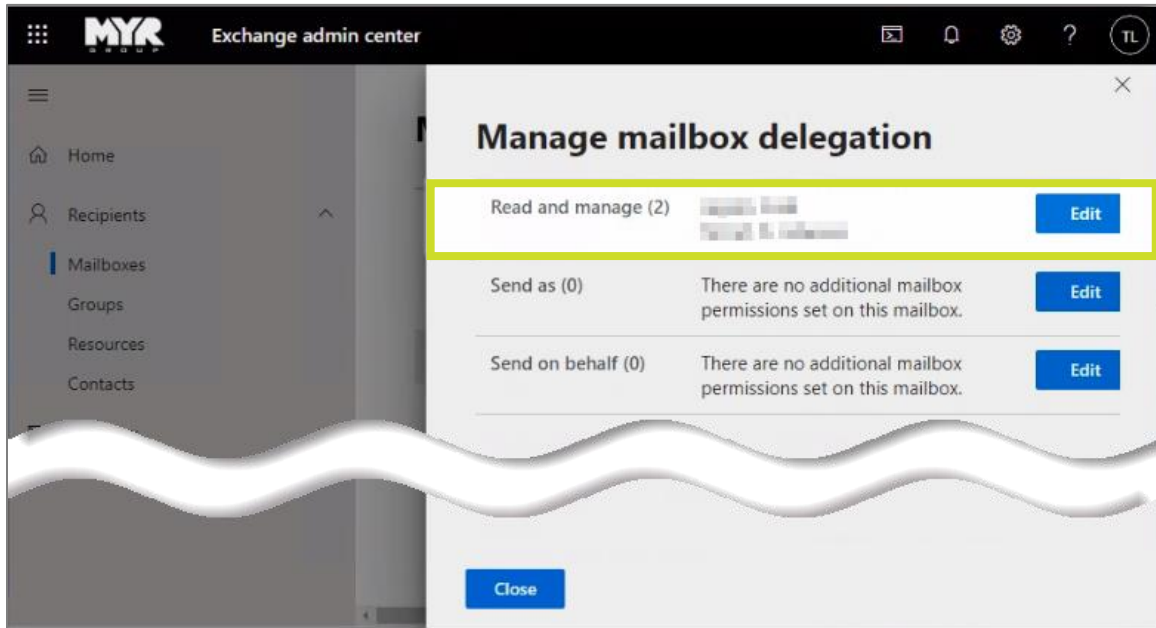


- 7. If a point of contact (POC) is specified, click **Manage mailbox delegation** on the flyout menu.

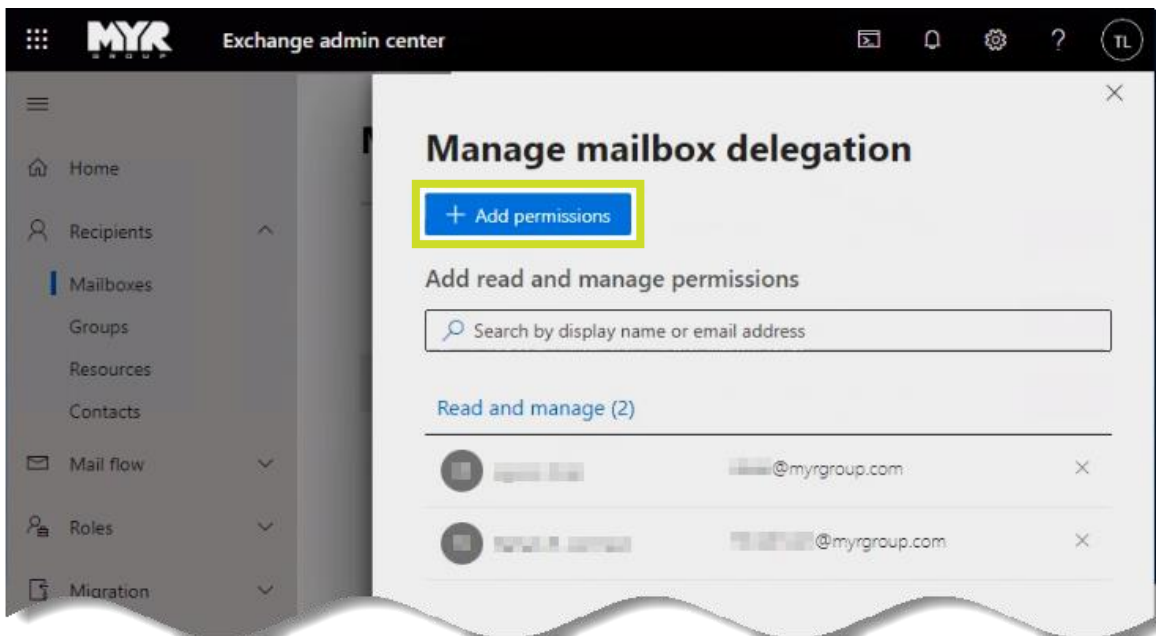




- 8. For the **Read and manage** option, click **Edit**.

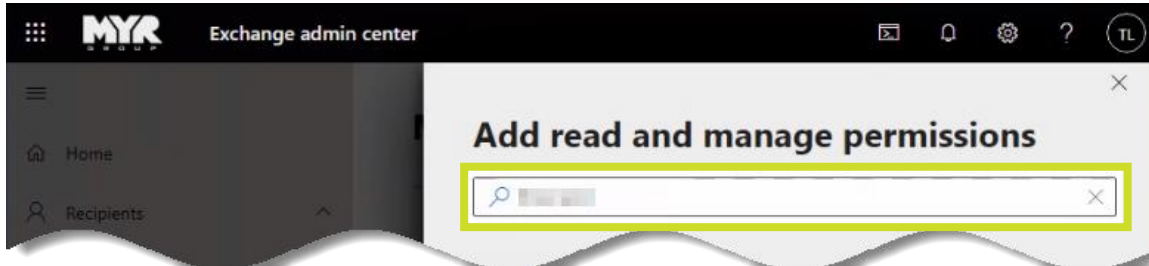


- 9. Click **+ Add permissions** and search for the designated POC.

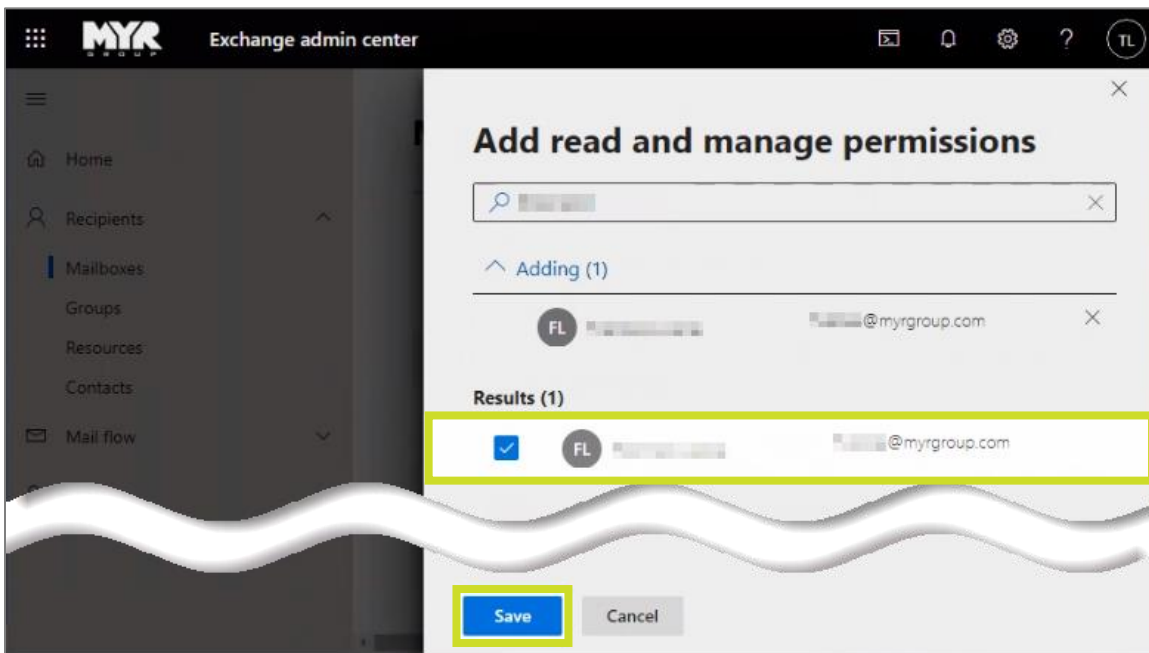




10. Search for the designated POC by entering the POC's name in the **Search** field.



11. In the search results, select the user's checkbox, then click **Save**.



12. When you are notified that mailbox permissions are added window, click **Close**.

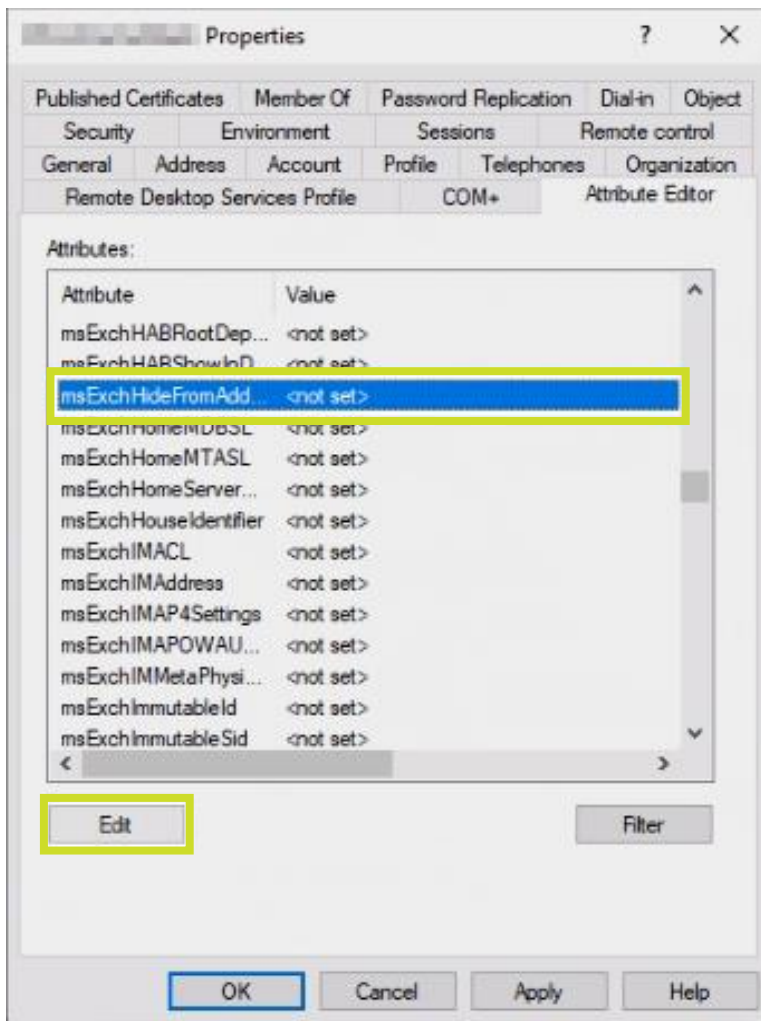


Remove the Former User from Outlook Lists and Software Groups

1. Find the former user's account in AD by locating the user in the appropriate OU.

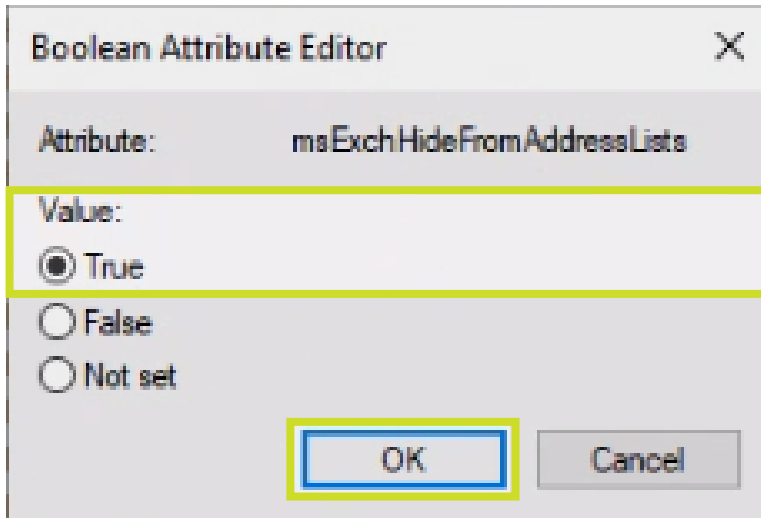
Note: If you look for the user by searching for the user's name, the windows that are needed to hide the user's name will not display.

2. In the Attribute Editor tab, locate and click the **msExchHideFromAddressLists** attribute. Then, click **Edit**.





3. In the Boolean Attribute Editor, change the **Value** to **True**. Then, click **OK**.

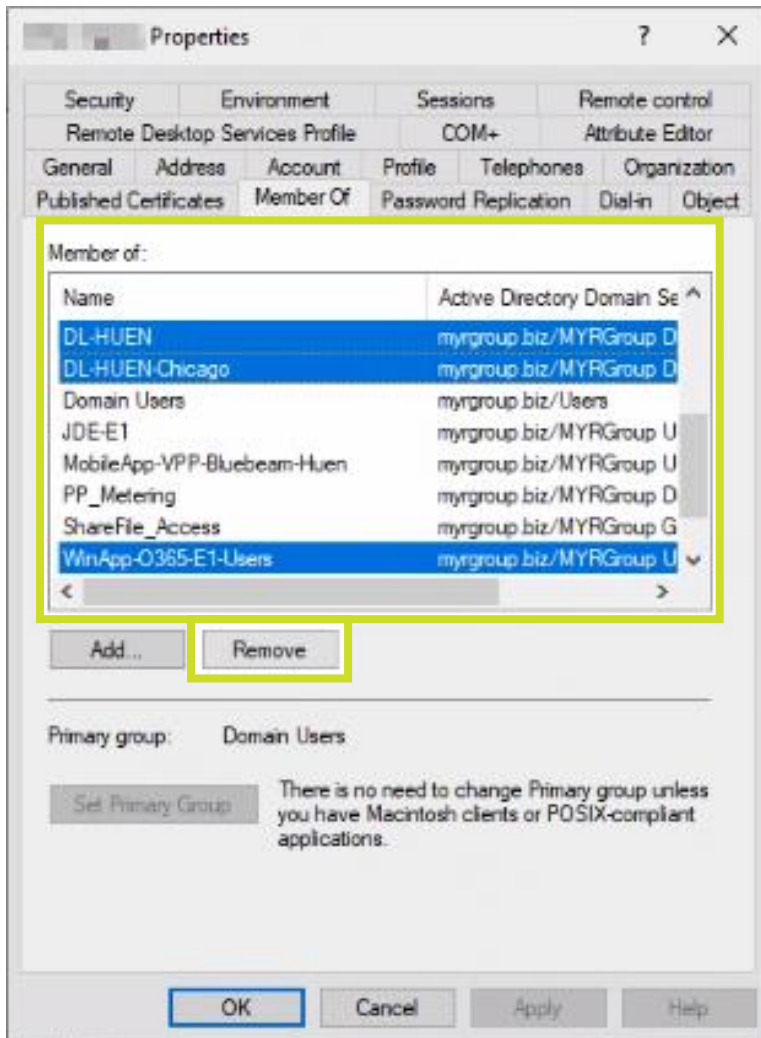


The image shows a dialog box titled "Boolean Attribute Editor" with a close button (X) in the top right corner. The dialog box has a light gray background and contains the following elements:

- Attribute:** msExchHideFromAddressLists
- Value:** A section containing three radio button options:
 - True
 - False
 - Not set
- Buttons:** Two buttons are located at the bottom of the dialog box: "OK" and "Cancel". The "OK" button is highlighted with a blue border, and the "True" radio button is highlighted with a yellow border.



- 4. In the Member Of tab, select all **DL** (distribution lists) and **WinApp** groups to which the user belongs, then click **Remove**. A message will ask you to confirm your changes; click **Yes**.

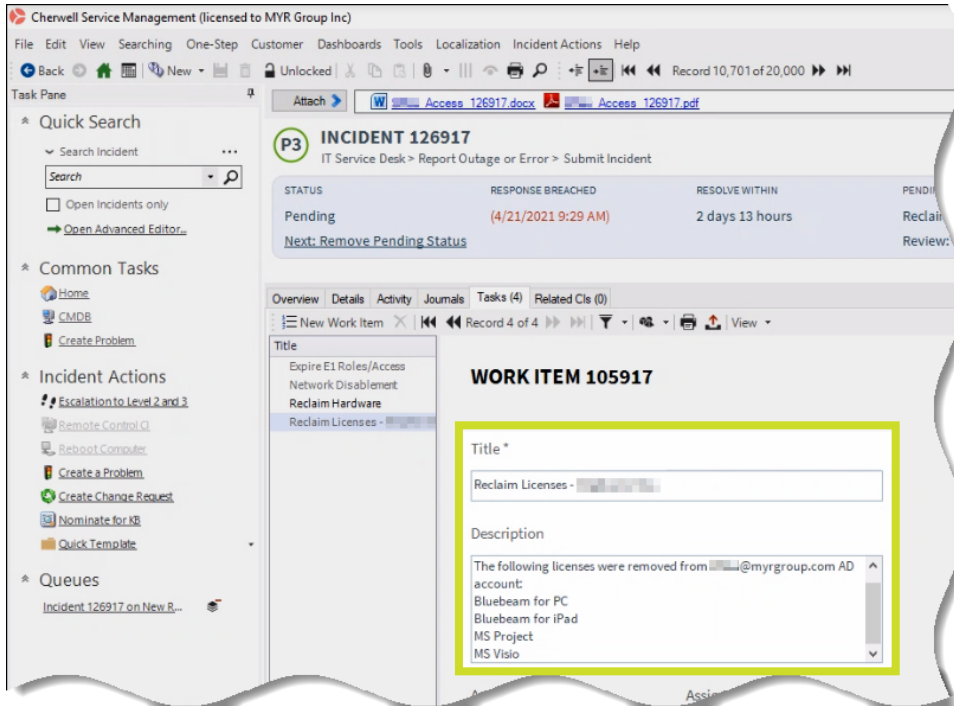


- 5. Document the lists and groups from which you removed the user in the **Completion Details** field of ticket in Cherwell.



Using Cherwell for a Terminated Employee

- If you removed the user from WinApp groups, create a work item in Cherwell, and in the **Title** field, enter **Reclaim Licenses [User Name]**. Then, list the removed WinApps in the **Description** field.



Use the table below to enter the common name of the software, instead of the software's object name.

Object Name	App Name
WinApp-Adobe-Acrobat Pro DC	Adobe Acrobat Pro DC
WinApp-Acrobat-All Apps Plan	Adobe All Apps Plan
WinApp-Adobe-Captivate	Adobe Captivate
WinApp-Adobe-CC	Adobe Creative Cloud
WinApp-Acrobat-Illustrator	Acrobat Illustrator
WinApp-Acrobat-InDesign	Acrobat InDesign
WinApp-Blackline	BlackLine
WinApp-Bluebeam	Bluebeam for PC
WinApp-Cherwell	Cherwell



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Object Name	App Name
WinApp-Const-Monkey	Construction Monkey
WinApp-O365-E3-Audio Conf	Teams Audio Conference License
WinApp-O365-Power BI Pro	MS Power BI Pro
WinApp-O365-Project OL Premium	MS Project OL Premium (Plan 5 license)
WinApp-O365-Project OL Pro	MS Project OL Pro (Plan 3 license)
WinApp-O365-Visio OL P2	MS Visio
MobileApp-VPP-Bluebeam	Bluebeam for iPad License
MobileApp-VPP-Bluebeam-Huen	Bluebeam for iPad License (Huen Only)

7. Assign the work item to the IT Administrative Lead. If the Administrative Lead is not available, assign it to the Service Desk Supervisor.

The screenshot displays the Cherwell Service Management interface. The top navigation bar includes 'File', 'Edit', 'View', 'Searching', 'One-Step', 'Customer', 'Dashboards', 'Tools', 'Localization', 'Incident Actions', and 'Help'. The main content area shows an incident titled 'INCIDENT 126917' with a status of 'Pending' and a response breach of '(4/21/2021 9:29 AM)'. Below the incident details, there is a 'WORK ITEM 105917' form. The form includes fields for 'Title' (Reclaim Licenses - [redacted]), 'Description' (The following licenses were removed from [redacted]@myrgroup.com AD account: Bluebeam for PC, Bluebeam for iPad, MS Project, MS Visio), and 'Assigned Team' (Desktop). The 'Assigned To' field is currently empty. A yellow box highlights the 'Assigned Team' and 'Assigned To' fields.

At that point, the person who was notified can reclaim the license for the software.



Using Cherwell for a Terminated Employee

8. If the former user is a member of the WinApp-Const-Monkey group, send an email to Construction Monkey at admin@constructionmonkey.com to remove the user's access. It is recommended that you send this email from Cherwell, so that all the IT information for the user's termination is in one location. From the termination ticket in Cherwell, complete the following steps:
 - a. Click the **Journals** tab.
 - b. Find a **Journal-Mail History** item, and click it to open it.

The screenshot displays the Cherwell Service Management interface for incident 126917. The interface includes a top navigation bar with options like File, Edit, View, Searching, One-Step, Customer, Dashboards, Tools, Localization, Incident Actions, and Help. Below this is a task pane with a 'Quick Search' section and 'Common Tasks' such as Home, CMDB, and Create Problem. The main content area shows the incident details for 'INCIDENT 126917' with a status of 'Resolved' and a resolution date of 4/27/2021 3:57 PM. The 'Journals' tab is selected, showing a list of journal items. The 'Journal - Mail History' item is highlighted with a yellow box. The details of this journal item are shown on the right, including the subject 'Termination Notification to IT - Q', the sender 'myr@myrgroup.com', and the recipient 'IT-HelpDesk@myrgroup.com'. The email body contains a termination notice for an employee at Sturgeon Electric Co.



Using Cherwell for a Terminated Employee

c. Click **E-mail**, and select **Forward**.

The screenshot displays the Cherwell Service Management interface for incident 126917. The interface includes a top navigation bar, a left-hand task pane, and a main content area. The incident details show a resolved status with response and resolution times. The 'Journal - Mail History' section is active, showing a list of journal entries. A context menu is open over the 'Journal - Mail History' entry, with the 'Forward' option highlighted. The email content in the journal entry discusses the termination of an employee.

Cherwell Service Management (licensed to MYR Group Inc)

File Edit View Searching One-Step Customer Dashboards Tools Localization Incident Actions Help

Back Home New Unlocked Record 10,875 of 20,000

Task Pane

Quick Search

Search Incident

Search

Open Incidents only

Open Advanced Editor...

Common Tasks

- Home
- CMDB
- Create Problem

Incident Actions

- Escalation to Level 2 and 3
- Remote Control CI
- Reboot Computer
- Create a Problem
- Create Change Request
- Nominate for KB
- Quick Template

Queues

Incident 126917 on New R...

Open the Queue Manager...

Process & Terminology

Incident - Any event that causes or interruption to service individual or

INCIDENT 126917

IT Service Desk > Report Outage or Error > Submit Incident

STATUS	RESPONDED	RESOLVED
Resolved	4/27/2021 3:56 PM	4/27/2021 3:57 PM

Next: Reopen Incident

Overview Details Activity Journals Resolution Details Tasks (4) Related Cls (0)

New Journal - Note Record 11 of 12

E-mail View e-mail Reply Reply to all Forward

Journal - Mail History

Created by CherwellServices on 4/21/2021 9:27:35 AM

Mark as Read

Details

Subject: Termination Notification to IT - Q

From: (myr@myrgroup.com) myr@myrgroup.com

To: (IT-HelpDesk) IT-HelpDesk@myrgroup.com

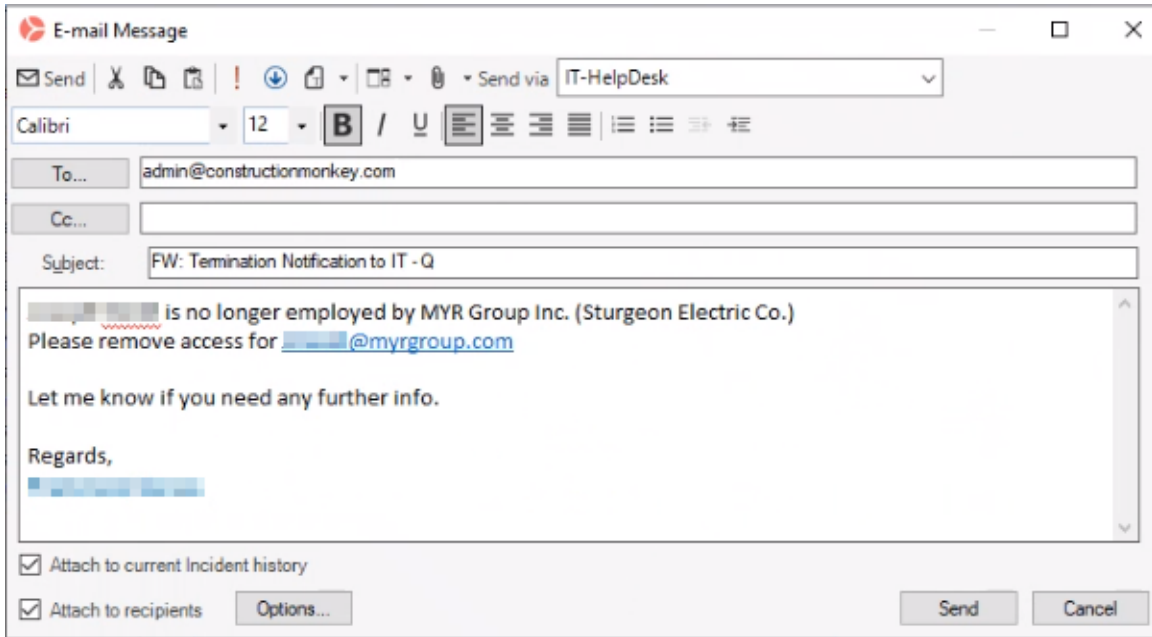
Date: 4/21/2021 9:27:35 AM

Please be advised that [REDACTED] is being terminated. Please take whatever actions necessary to terminate IT services as of 04/19/21. [REDACTED] is located at:

- COC Security Cost Center
- Sturgeon Electric Co.
- Q
- E1-HTML11
- LCOOPER



- d. In the email form, inform Construction Monkey that the former user is no longer an employee at MYR Group, and ask that it removes the user’s access. Then, click **Send**.

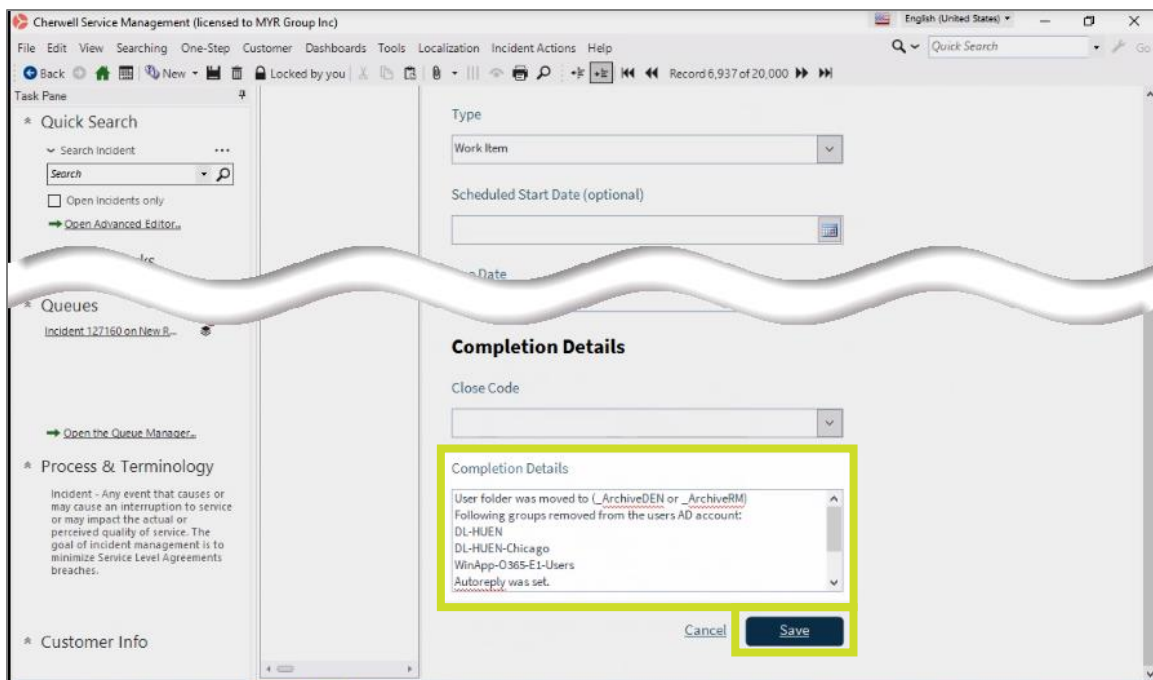


- e. Construction Monkey will email you to notify you when your request is complete. If it replies to the email you sent, the response will be in the ticket. Otherwise, copy and paste the response from the email to the ticket.
9. Send an e-mail to the proxy user, notifying the user of access to the terminated user’s mailbox and H: drive files (if applicable).



Close the Work Item

1. In Cherwell, document your work in the work item as appropriate, then click **Save**.
2. When you receive the user's hardware, enter in the **Completion Details** field something similar to the following: **Hardware was returned [MM/DD]. Placing in BU [business unit] stock.**
3. If the user had an AD account, enter the following in the **Completion Details** field, as appropriate:
 - Indicate where you moved the user's folder (_ArchiveDEN or _ArchiveRM).
 - Name the groups from which you removed the user's AD account.
 - Indicate that you set autoreply.
 - Indicate that you hid the mailbox from address lists.
 - Name who received proxy access (if applicable).





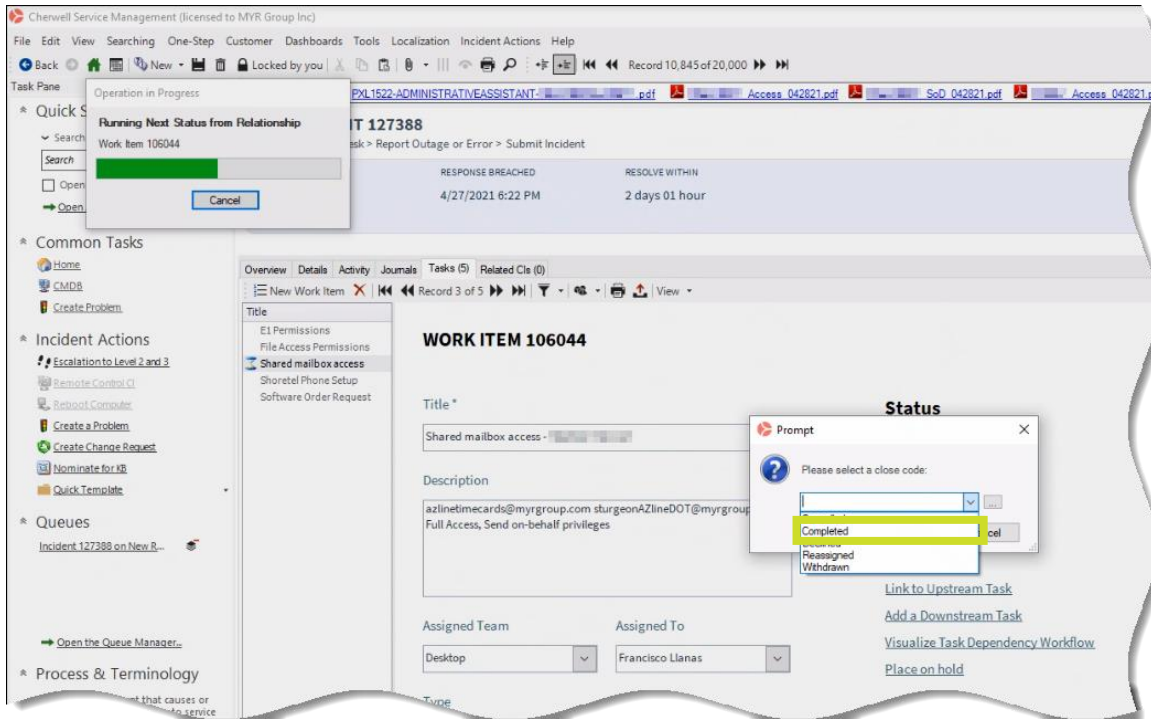
- 4. When the work item is complete, click **Close**.

The screenshot displays the Cherwell Service Management interface. At the top, the menu bar includes File, Edit, View, Searching, One-Step, Customer, Dashboards, Tools, Localization, Incident Actions, and Help. The left sidebar contains sections for Quick Search, Common Tasks, Incident Actions, Queues, and Process & Terminology. The main content area shows Incident 127388 with a status of 'In Progress' and a 'Next: Resolve' action. Below this, a 'WORK ITEM 106044' is displayed with a title of 'Shared mailbox access - [redacted]', a description field, and an assigned team of 'Desktop'. The 'Status' section shows 'In Progress' and a 'Close' button highlighted with a yellow box. The 'Actions' section includes links for 'Assign to Me', 'Link to Upstream Task', 'Add a Downstream Task', 'Visualize Task Dependency Workflow', and 'Place on hold'.



Using Cherwell for a Terminated Employee

- When prompted, select **Completed** as the close reason.



Revision History

Version	Date	Description	Approver	Reference ID
1.0	9-Feb-2021	Initial version.		None