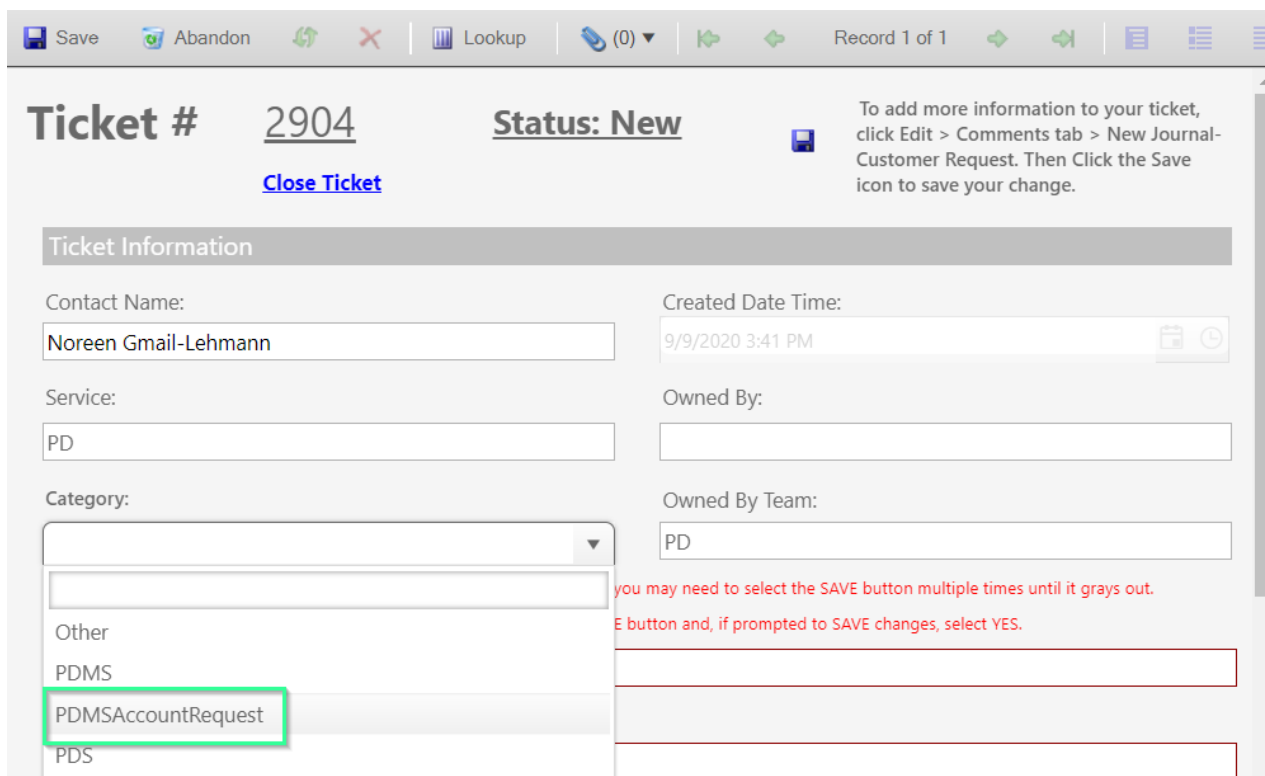


For requests related to new PDMS/PDS accounts, the ticket must be created via the Cherwell **Customer Portal** as opposed to sending an email to create the Cherwell ticket: <https://helpdesk.ohconnect.org/cherwellportal/itc>

It is recommended that you also review the general Cherwell Customer guide for other information on utilizing the portal: http://ohconnect.org/files/cher-connect_customer_guide.pdf

1. Create a new ticket in the Cherwell **PDMS/PDS Services** Area.
2. In the **Summary** (required field), enter the topic of your request, similar to an email subject line.
3. In the **Description** (required field), enter a brief note and provide pertinent details not covered in the account request 'form' area.
4. Modify the **Category** and select *PDMS AccountRequest*.



The screenshot shows the Cherwell Customer Portal interface for creating a ticket. At the top, there is a toolbar with buttons for Save, Abandon, Lookup, and other actions. The ticket number is 2904 and the status is New. A "Close Ticket" link is visible. The form fields include Contact Name (Noreen Gmail-Lehmann), Created Date Time (9/9/2020 3:41 PM), Service (PD), Owned By, and Owned By Team (PD). The Category dropdown menu is open, showing options: Other, PDMS, PDMSAccountRequest (highlighted with a green box), and PDS. A red text warning states: "you may need to select the SAVE button multiple times until it grays out. E button and, if prompted to SAVE changes, select YES."

Continued on next page →

5. Once the PDMSAccountRequest category has been selected, scroll down for the form questions; illustrations below. Be sure to answer all questions. If questions are unclear, please contact pd-cherwell@ohconnect.org.
- For the *Employee Name*, enter the name of the **account holder**, not the name of the individual inputting the account request.
 - Be sure to select the appropriate *Access Level* as the access level will determine what options display when that individual logs in:
 - **Educator** - for staff who need access only to maintain a plan/activities
 - **LPDC Member** – for regular members of the LPDC who need to review and approve plans and activities
 - **LPDC Chair** – for the LPDC Chair who needs the same level of access as a committee member, **plus** additional administrator-level options
6. **Be sure to select the Save button to save the request. You may need to select it more than once to activate it.**

IMPORTANT: After entering your ticket details, you may need to select the SAVE button multiple times until it grays out.

Summary: Alternatively, select the HOME button and, if prompted to SAVE changes, select YES.

IPDP Account request for Scooby Doo

Description:

See below. District username is: sdoo

Employee Name:	<input type="text" value="Scooby Doo"/>
District:	<input type="text" value="Hanna Barbera School District"/>
Email Address:	<input type="text" value="morescoobysnacks@hbsd.org"/>
Access Level:	<input type="text" value="Educator"/>
State Certification Number:	<input type="text" value="OH123456"/>
Building:	<input type="text" value="HB ES"/>
Title/Position:	<input type="text" value="Teacher"/>