How to Change Your Password in Cherwell

October 2018

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*The **IT Help Desk** at **San Diego Unified School District** uses the **Cherwell Service Management (CSM)** 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 first set up, and then use, the **Self-Service, Password Reset** feature in the **Cherwell** CSM system.*

*There are two essential parts to the **Self-Service, Password Reset** feature. First, you must set up this feature to activate the **Self-Service, Password Reset**. Then, you will be able to use the **Self-Service, Password Reset** to change (or reset) your District (DWA) Password at any time without the assistance of the **SDCS Help Desk**.*
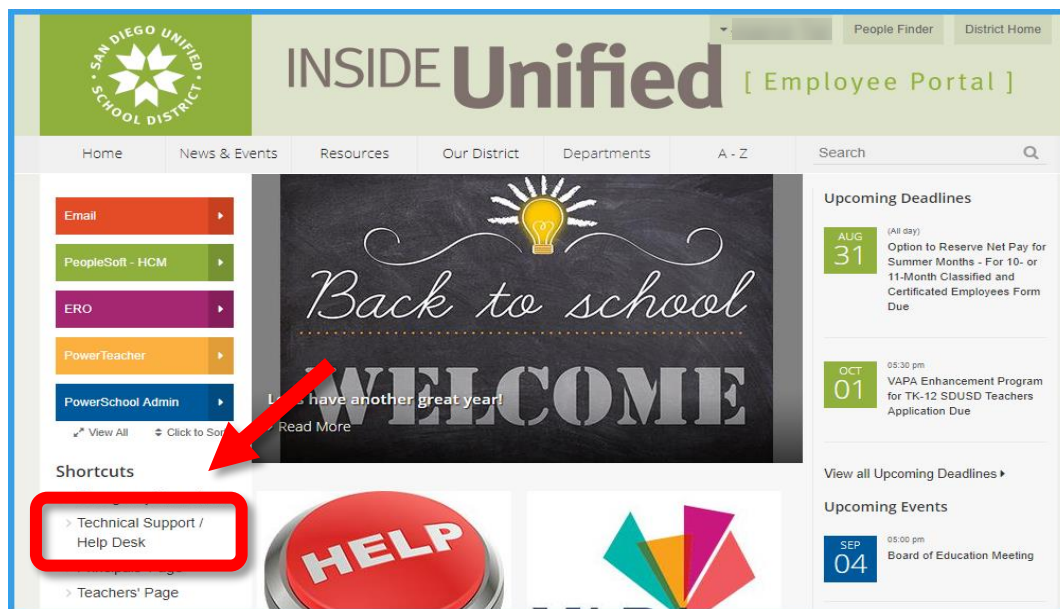
> **Part 1**; provides the necessary steps for you to set up and activate the **Self-Service, Password Reset** feature in the **Cherwell CSM** system (*these steps **must** be completed or you **will not** be able to reset your District (DWA) Password without the assistance of the **SDCS Help Desk**).

> **Part 2**; provides the necessary steps for you to change *(or reset)* your District (DWA) Password at any time using the **Self-Service, Password Reset** feature in the **Cherwell CSM** system.

Part 1: How to Set Up the Self-Service, Password Reset Feature in Cherwell CSM

Follow the steps below to set up and activate the **Self-Service, Password Reset** feature in the **Cherwell Service Management** system.
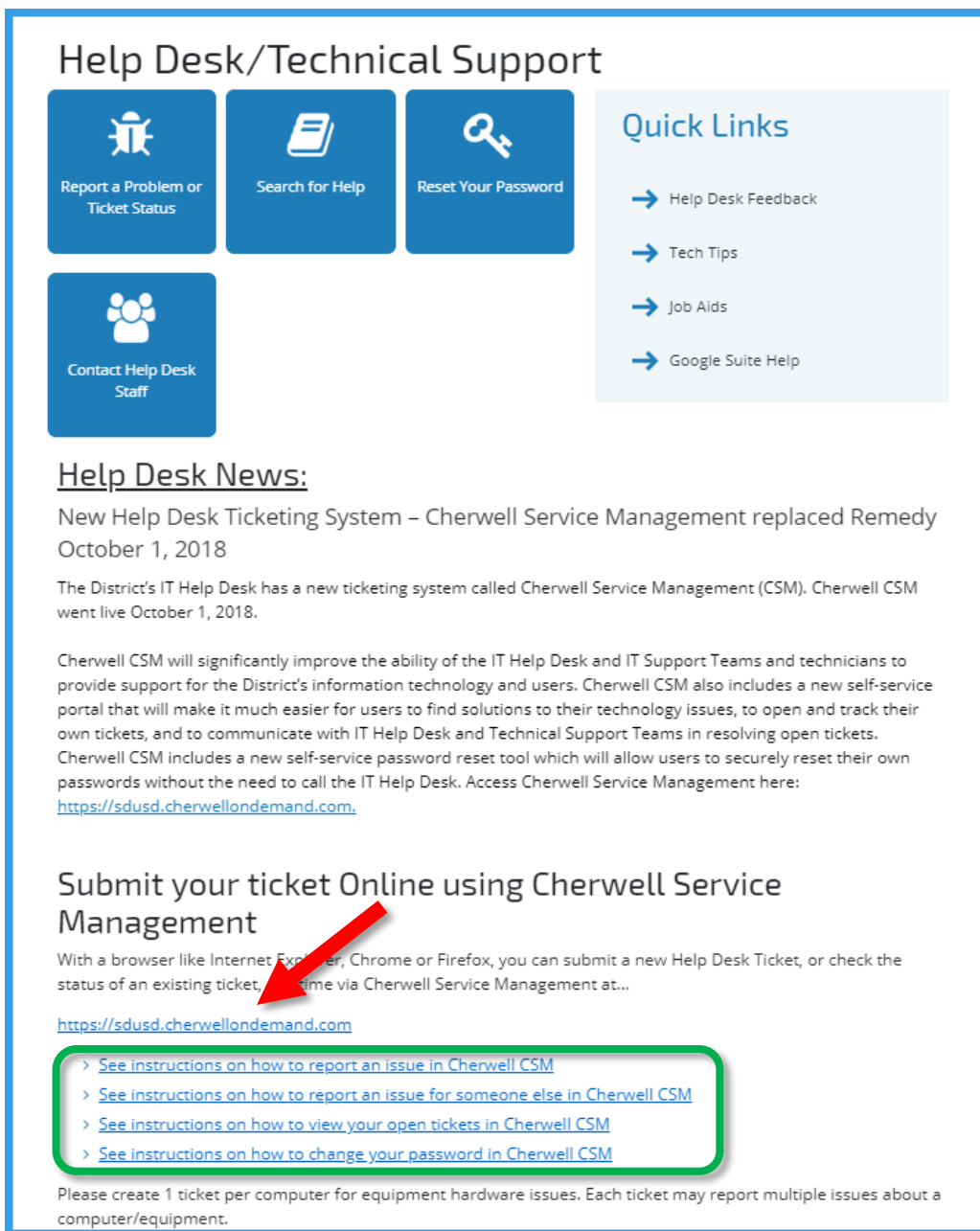
1. On the **San Diego Unified School District** website, click on the **Staff Portal** and sign in. In the bottom, left corner of the page under the heading, **Shortcuts**, click on the link **Technical Support/Help Desk**.

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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).*

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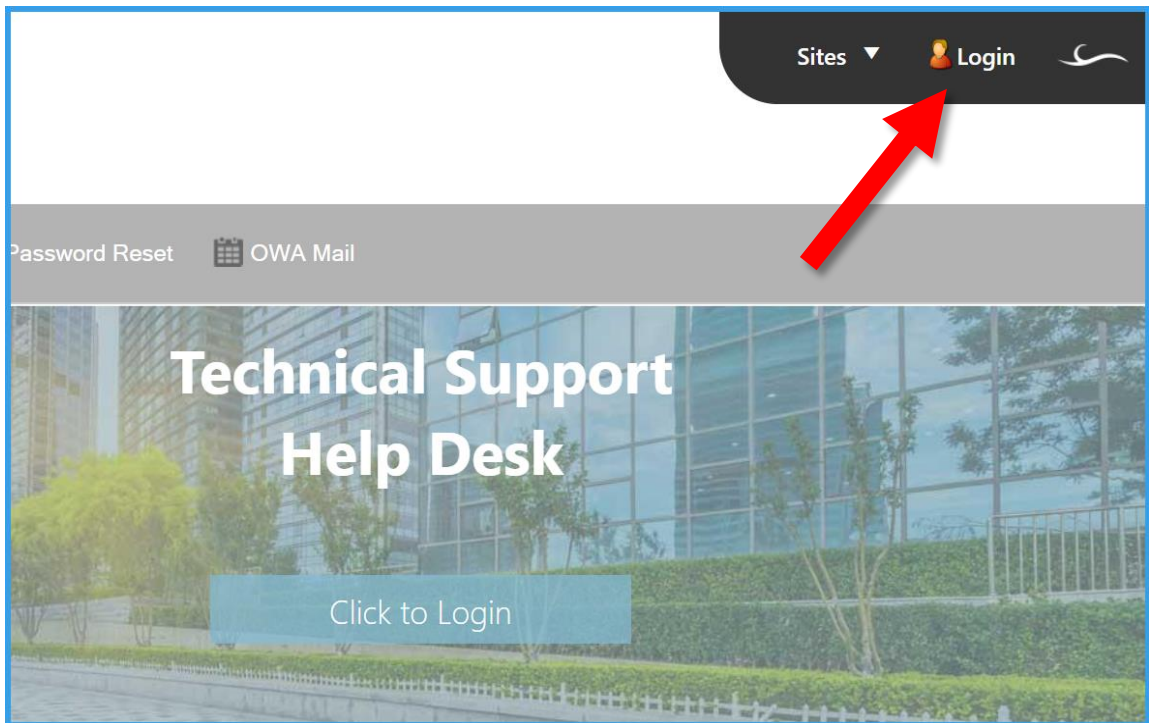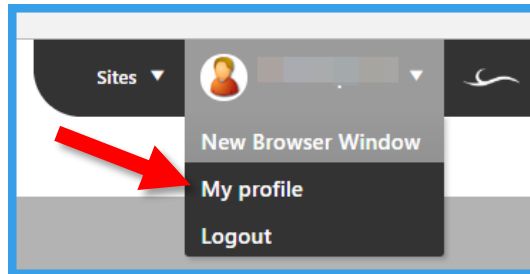

4. The **SDCS** login page will appear. Enter your District (**DWA**) **Employee ID** and **Password,** then click the **Sign in** button below.
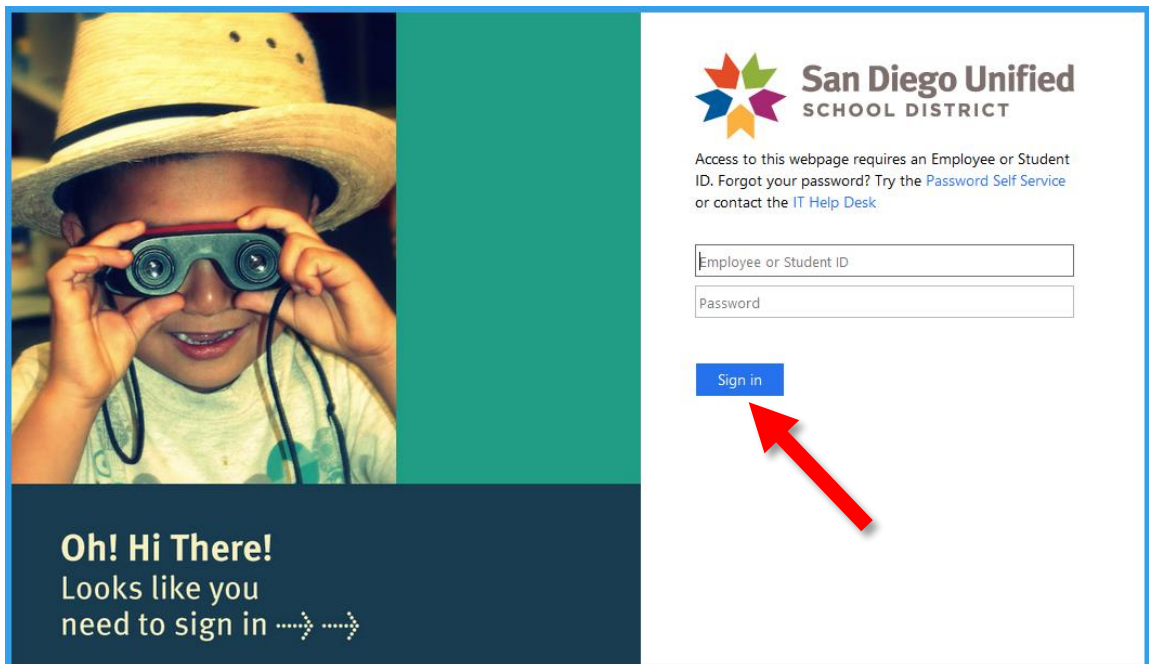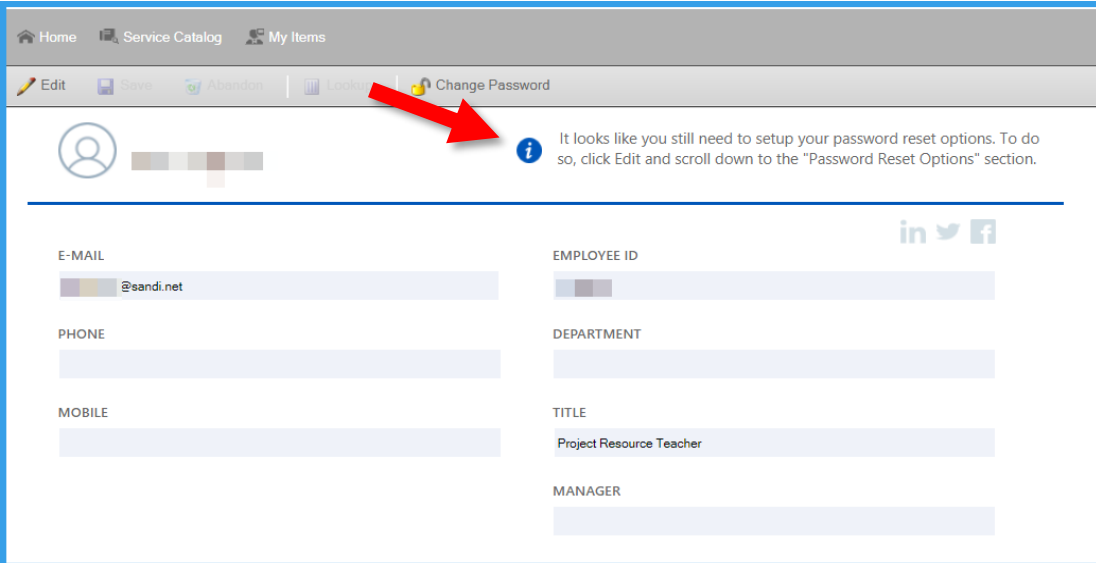
5. Your **Cherwell Service Management** account home page will display. In the top, right corner of the page, click on your name to reveal the drop-down menu. Then, select **My Profile**.


6. Your **My Profile** page will display. Carefully check the information provided in each field for accuracy. If needed, make corrections to these fields.

   Note: You **must** provide your mobile phone number to enable **SMS** (text) **Validation** options *(see **Step 10, Option 2** & **Option 3**, below).*


Important: If you have not previously **set up** the **Self-Service**, **Password Reset** feature in your **Cherwell CSM** account, you will be prompted to do so when you open your **My profile** page. A message will appear in the upper, right section of the page stating that you need to set up your password reset options *(see the **red** arrow above or the enlarged view below).*
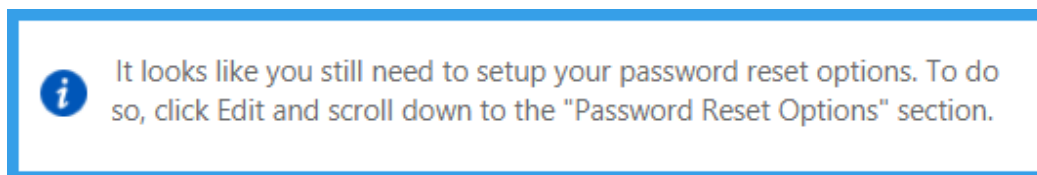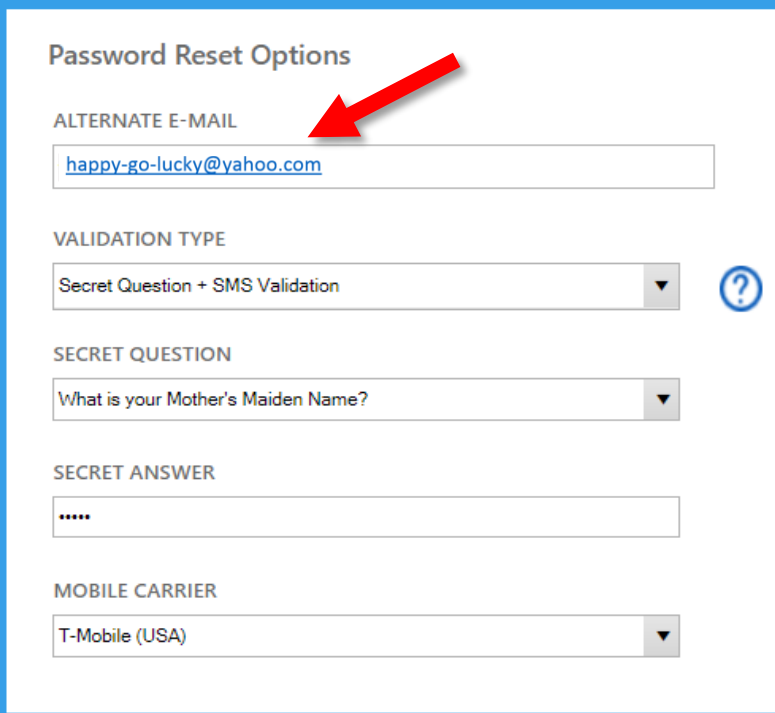
7. Click on the **Edit** button in the top, left corner of your **My profile** page to reveal the **Password Reset Options** section.
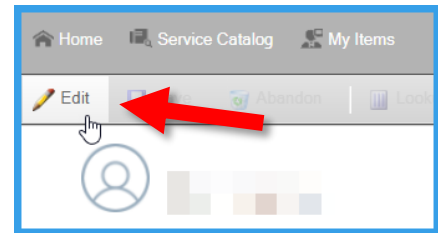
8. The **Password Reset Options** section will display below your **Profile** information. First, enter a **Non-District** email address in the **ALTERNATE E-MAIL** field to enable important update notifications from the **Cherwell Service Management** system.

9. Next, in the **VALIDATION TYPE** field, click on the drop-down arrow to reveal the three available options for secure, password-reset validation.

10. Three password-reset validation options are available within the **Self-Service**, **Password Reset** feature. The **Secret Question**, the **SMS** (text) **Validation**, or the **Secret Question + SMS** (text) **Validation**. You must select on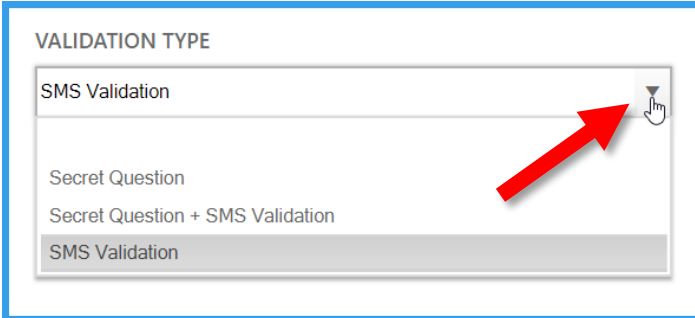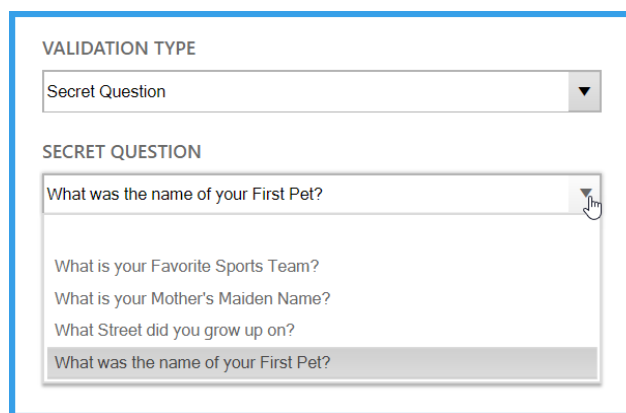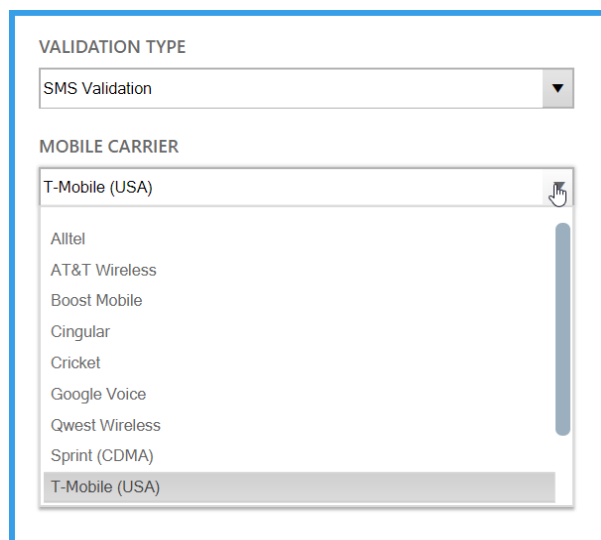e of the three validation options and complete the setup process to activate the **Cherwell CSM** system **Self-Service**, **Password Reset** feature *(see the three validation option descriptions below).*

- Selecting <u>**Option 1**</u>; **Secret Question**, will prompt the user to choose a personal question from a drop-down menu and then enter the answer to that question in the field provided to complete the validation setup. This question and answer will be used by the **Cherwell CSM** system to securely validate the user during the password reset process.

VALIDATION TYPE

Secret Question ▼

SECRET QUESTION

What was the name of your First Pet? ▼

What is your Favorite Sports Team?
What is your Mother's Maiden Name?
What Street did you grow up on?
What was the name of your First Pet?

- Selecting <u>**Option 2**</u>; **SMS** (text) **Validation**, will prompt the user to select their current mobile carrier from the drop-down menu in the **MOBILE CARRIER** field to complete the validation setup. During the password reset process, the **Cherwell CSM** system will send an **SMS** (text) **Validation** code to the user's cell phone to securely validate the user.

VALIDATION TYPE

SMS Validation ▼

MOBILE CARRIER

T-Mobile (USA) ▼

Alltel
AT&T Wireless
Boost Mobile
Cingular
Cricket
Google Voice
Qwest Wireless
Sprint (CDMA)
T-Mobile (USA)

- Selecting **Option 3**; **Secret Question + SMS** (text) **Validation**, will prompt the user to **both**; select a personal question from a drop-down menu and then provide the answer, as well as, prompt the user to select their current mobile carrier to complete the setup process. During the password reset process, the **Cherwell CSM** system will send an **SMS** (text) **Validation** code to the user's cell phone, as well as, require the user to answer the personal question to securely validate the user.

11. Once you have selected one of the three options for secure validation and entered the required information in the corresponding fields, click on the **Save** button in the top, left corner of the page to complete the **Self-Service**, **Password Reset** setup.
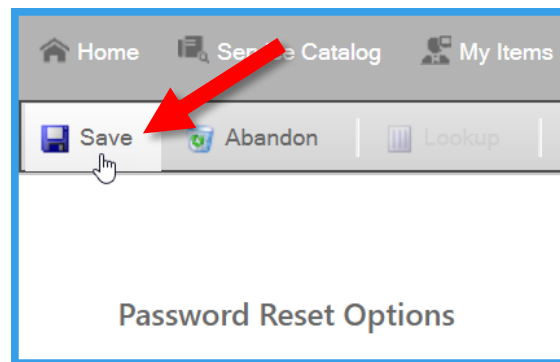
Note: With this **Self-Service**, **Password Reset** feature set up and saved, you may change *(or reset)* your District (DWA) Password at any time without assistance from the **SDCS Help Desk**.

For instructions on how to change or reset your District (DWA) Password, see below, **Part 2**: **How to Change Your District (DWA) Password in Cherwell CSM**.
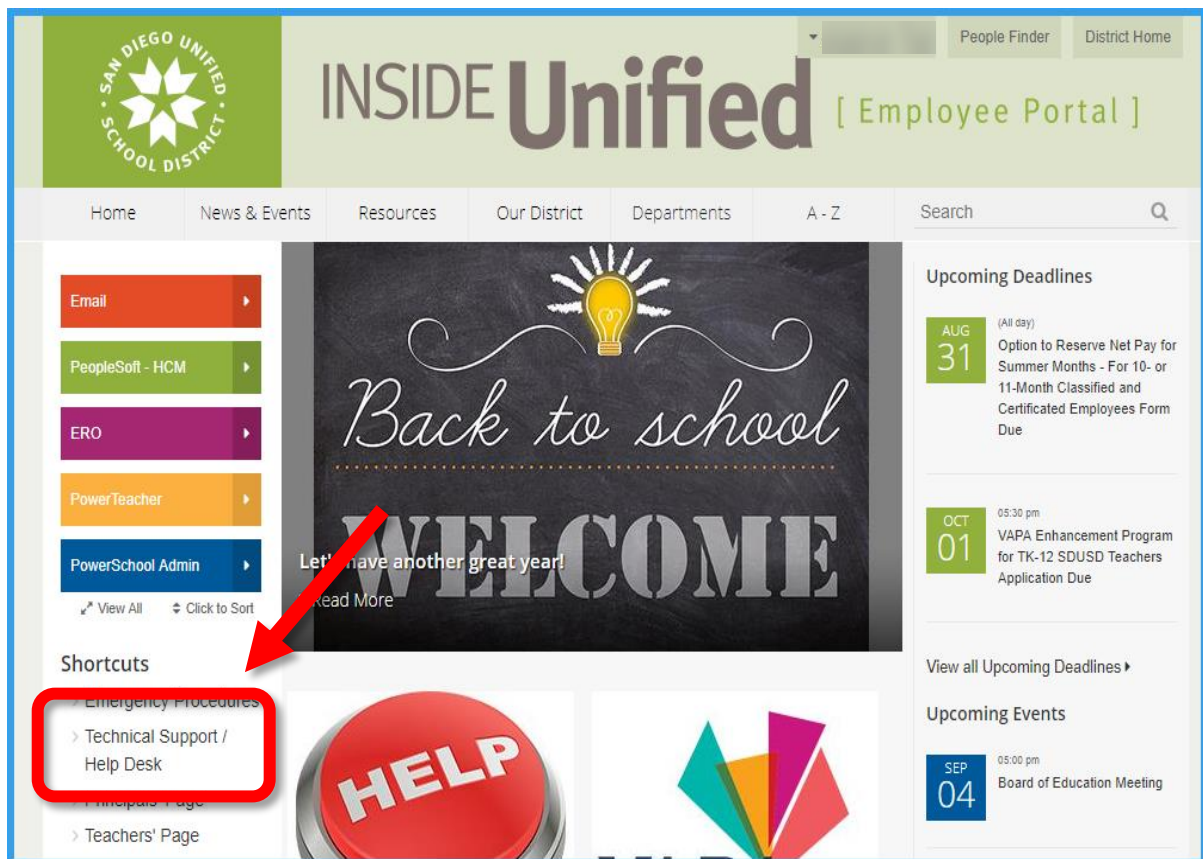

Part 2: How to Change Your District (DWA) Password in Cherwell CSM

IMPORTANT: You _must_ first **set up** the **Self-Service**, **Password Reset** feature in the **Cherwell Service Management** system prior to an attempt to reset your District (DWA) Password (*see above*, **Part 1**: **How to Set Up the Self-Service, Password Reset Feature in Cherwell CSM**).

> **Note**: Unless this initial **setup** process is complete, you will **not** be able to change *(or reset)* your password without the assistance of the **SDCS Help Desk**.

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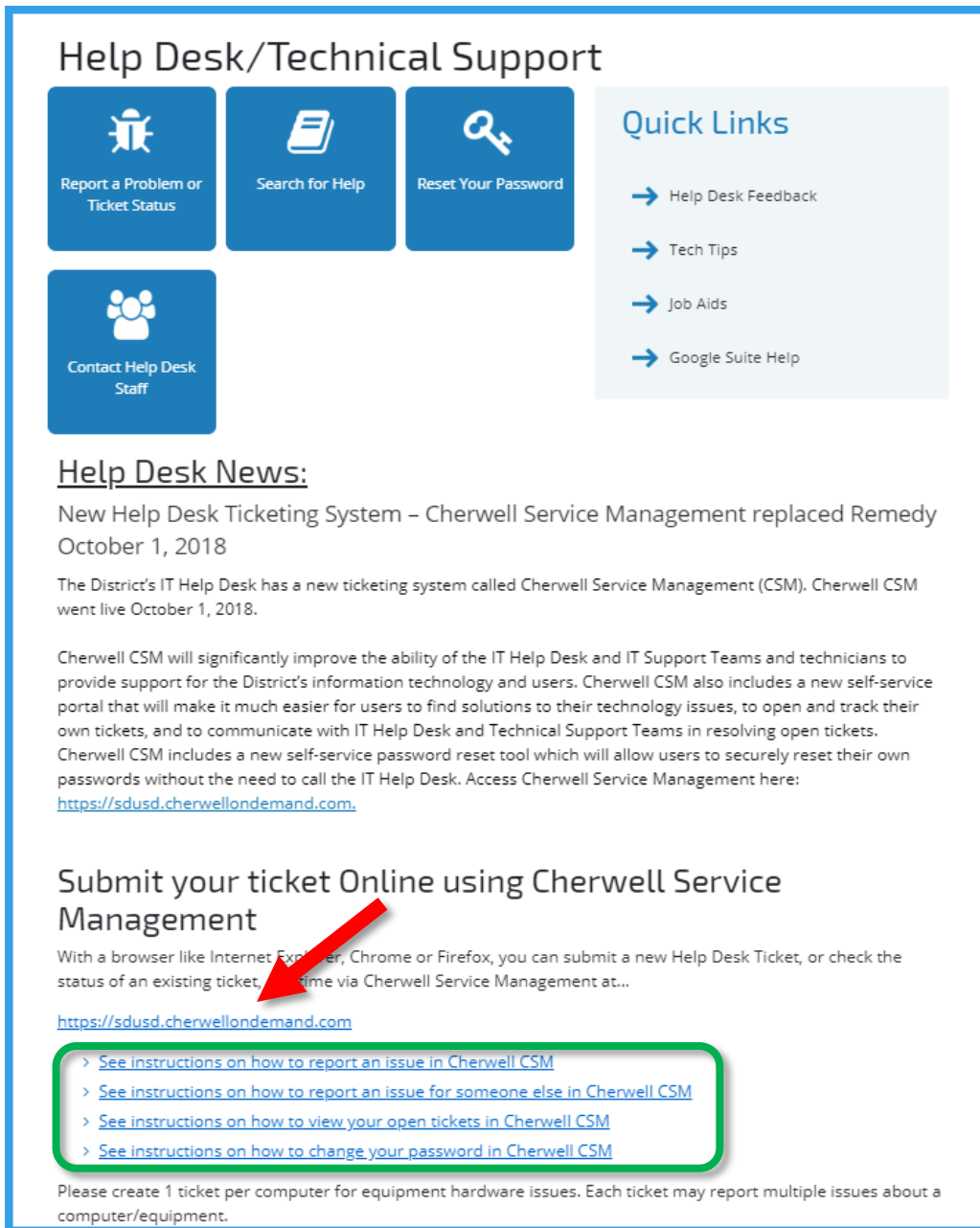
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2. The **Help Desk/Technical Support** home page will display. Under the heading, **Help Desk News**, you will find important information regarding the new **Cherwell Service Management** system. To get to the **Cherwell CSM** home page, simply click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

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. In the upper, left section of the **Cherwell Service Management** system home page, click on the link, **Self-Service**, **Password Reset** to begin the password reset process.
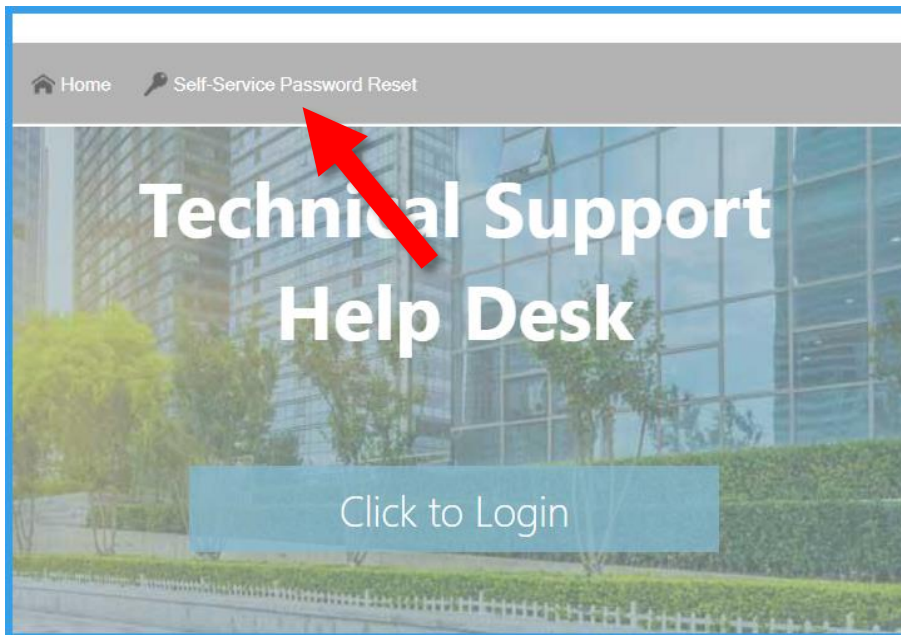
4. The **Password Reset Form** page will display. In the **Enter your User Account** field, enter your SDCS Employee ID number and then press the **Enter** key on your keyboard *(or, click on the binoculars icon to the right of the **Enter your User Account** field)*.

5. The **Password Reset Form** will expand revealing the password-reset validation option you selected previously in the **Self-Service, Password Reset** setup process (*see above,* <u>**Part 1**</u>: **How to Set Up the Self-Service, Password Reset Feature in Cherwell CSM**). In the example below, <u>**Option 3**</u>; **Secret Question + SMS** (text) **Validation**, is displayed to demonstrate both validation types. To reset your District (DWA) Password using this validation option, you would have to ***both***, answer the personal question <u>*and*</u> enter the **SMS** (text) **Verification Code** received on your cell phone. After each field is filled in correctly, you would press the **Enter** key to prepare for the next step. *(A **green** circle with a checkmark will appear to the right indicating that all fields are completed correctly.)*

6. With all fields completed correctly, you would simply click on the **Submit Password Reset Form** button in the top, left section of the page to complete this step of the password reset request.
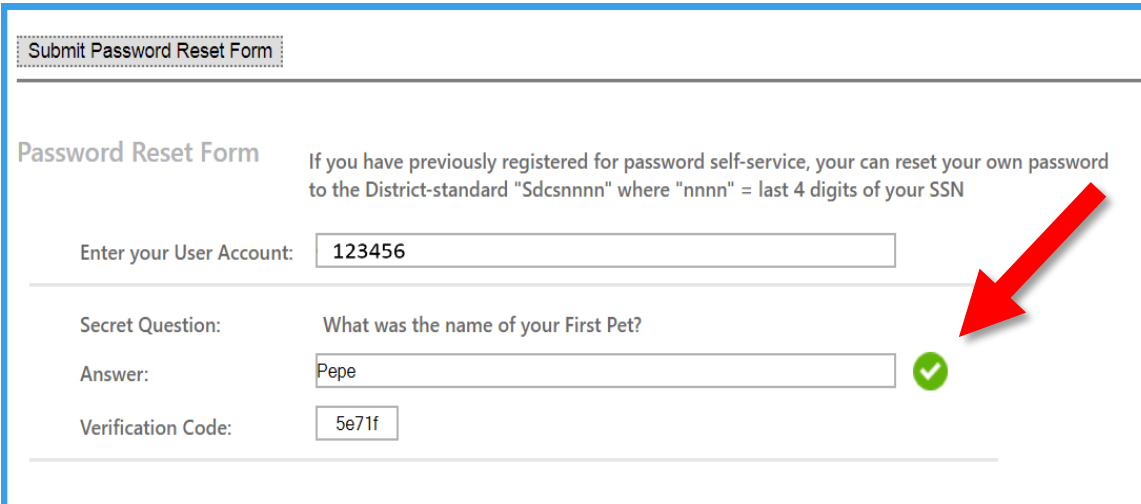

<u>**NOTE:**</u>

If you selected, (<u>**Option 1**</u>) **Secret Question** validation during the **Self-Service, Password Reset** setup, then you would simply need to answer the personal question and then click on the **Submit Password Reset Form** button to complete this step of the password reset request.

If you selected, (<u>**Option 2**</u>) **SMS** (text) **Validation** during the **Self-Service, Password Reset** setup, then you would simply need to enter the **SMS** (text) **Verification Code** received on your cell phone and then click on the **Submit Password Reset Form** button to complete this step of the password reset request.

In the example above, <u>**Option 3**</u>; **Secret Question + SMS** (text) **Validation** was used to demonstrate both validation options 1 & 2, simultaneously.

7. In each of the three password-reset validation options, once the **Submit Password Reset Form** button is selected, a **Password Reset** information page will display indicating that you have successfully submitted your password-reset request.

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You have submitted your password reset request.

Please NOTE that the system will take approximately one minute to complete your password reset.

Once complete, your password will be reset to the District standard password format

"SdcsXXXX" where "XXXX" is the last 4 digits of your social security number (**example: Sdcs1234**).

To complete the process, the system will require you to set a unique password for your account.

Please click the link below to go to the District's email web site where you will enter your default password.

The system will prompt you to change your password to something unique.

https://exchange.sandi.net

Please NOTE - your **unique password** must conform to the following password format rules.

Password Format:

- Cannot contain your first or last name or your DWA/Employee user ID;
- Cannot use any of your previous six (6) passwords;
- Must be a minimum of 8 characters;
- Must contain at least one CAPITAL letter and one lowercase letter;
- Must contain at least one number (0-9);

Note: Your District (DWA) Password has now been reset to the **SDCS** default password; **SdcsXXXX**, with the **XXXX** representing the last four digits of your **Social Security** number. For example, if your **Social Security** number were, **123-45-6789**, then your **SDCS** default password would be, "**Sdcs6789**". You will use your temporary default password to set up a new, unique password after clicking on the link provided in the middle of the page: **https://exchange.sandi.net** .

8. Next, click on the link provided in the middle of this information page: **https://exchange.sandi.net** (see the **red** arrow above).

9. The District's **Outlook Web Application** Sign In page will display. Enter your six digit, **User name** *(SDCS Employee ID)* in the field provided. Then, in the **Password** field below, enter the **SDCS** default password; **SdcsXXXX**, with the **XXXX** representing the last four digits of your **Social Security** number. Then click **Sign In** at the bottom of the page.

10. The **Change Password** dialog box will then appear. In the **Current Password** field, enter your **SDCS** default password; **SdcsXXXX**, with the **XXXX** representing the last four digits of your **Social Security** number.

    (For a complete list of District Password Format rules, see the screenshot on the following page.)

Note: To create a new password, you *must* follow the District's Password Format rules.

> Please NOTE - your **unique password** must conform to the following password format rules.
>
> **Password Format:**
>
> - Cannot contain your first or last name or your DWA/Employee user ID;
> - Cannot use any of your previous six (6) passwords;
> - Must be a minimum of 8 characters;
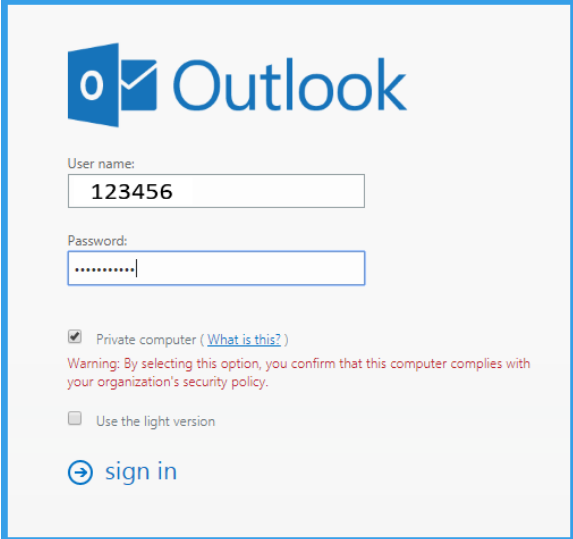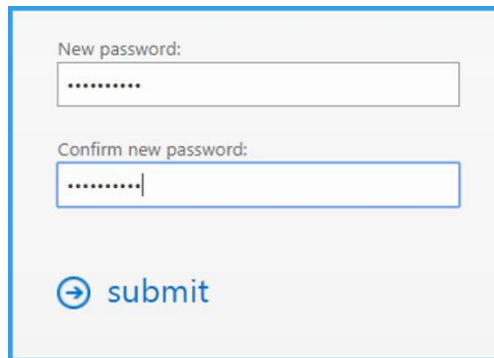> - Must contain at least one CAPITAL letter and one lowercase letter;
> - Must contain at least one number (0-9);

11. In the **New Password** field, enter a unique password that conforms to the District's Password Format rules. Then, confirm the new password by re-entering it in the field below. Finally, click the **Submit** button to reset your District (DWA) Password.

> New password:
> ●●●●●●●●●
>
> Confirm new password:
> ●●●●●●●●●|
>
> ⊕ submit

12. An **Outlook** dialog box will display indicating that your password change was successful. Click, **OK**, to sign in using your new District (DWA) Password.

> **o⊠ Outlook**
>
> Your password has been changed. Click OK to sign in with your new password.
>
> ⊕ OK
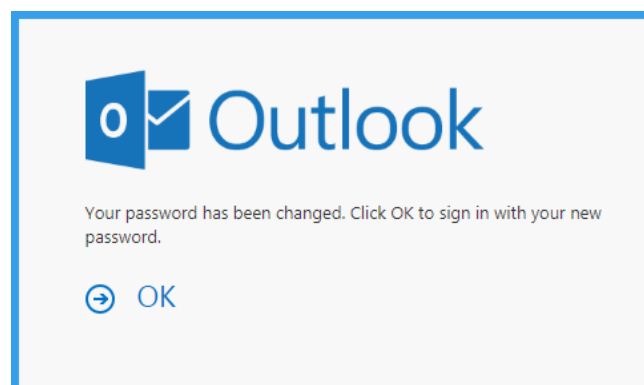
Note: The **Self-Service, Password Reset** process can be repeated as many times as needed. Each time you reset your password, you will have to re-sign in to all of your District applications using your new District (DWA) Password.