

# What's New in CSM 10.0.0?

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The Cherwell Software product suite includes:

- Cherwell Service Management
- Cherwell Asset Management

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## **Overview of What's New in CSM 10.0.0**

Links to community-suggested features on the Cherwell Ideation Station are provided when available. You must create an account and be logged in to view ideas. Additionally, links to "Learn more ..." about the feature are provided at the bottom of most sections.

## Authentication Consolidation for CSM Web Applications

To accommodate the move to modern web technologies and to simplify troubleshooting, user authentication for the CSM Browser Client, CSM Customer Portal, and Service Monitor has been consolidated through the Cherwell REST API. This change also impacts third-party reporting tools, Saved Searches, webhooks, and other CSM features.

#### Unified SAML Authentication

SAML authentication for all CSM clients now flows through a single endpoint on the Cherwell REST API, no longer through the Cherwell Web Service. This change in endpoint is part of an effort to unify authentication of all Cherwell applications and services through the REST API, simplying configuration, maintenance, and troubleshooting.

Due to this change in authentication, the SAML endpoint must be updated in both CSM and the SAML Service Provider. If the URL to the Cherwell REST API is entered during upgrade, the CSM SAML update is performed automatically. Otherwise, you must update the SAML value manually.

#### Learn more ...

#### • Requirement to Set the Base URL for the Cherwell REST API

To support authentication changes, the base REST API URL must be configured in the installer, in the **Security** section of CSM Administrator, or through the Command-Line Configure (CLC) Utility. The URL must be in the following format: https://host.domain/CherwellAPI/api/.

Note the following scenarios for setting the base REST API URL:

 If installing CSM for the first time (not an update or system restore), you are prompted to set the REST API URL during the installation process. If you skip this step, you can still install CSM, but an error that says that the application is not configured to communicate with the Cherwell API Server will display when you attempt to log in.

#### Learn More ...

- If you are upgrading to CSM 10.0.0 from a previous version of CSM, and the base REST API URL was already configured in the previous version, no action is required. You are never prompted to provide the REST API URL, because it carries over to CSM 10.0.0 automatically.
- If you are upgrading to CSM 10.0.0 from a previous version of CSM or performing a system restore, if the REST API URL was not configured in CSM Administrator or through the command line, you are prompted for the URL during the upgrade/restore process. After entering the URL, the system confirms that the URL in the proper format: https://host.domain/ CherwellAPI/api/.

#### Learn More ...

 If you use the CLC Utility to install, upgrade, or restore CSM, if the REST API URL is missing, a caution message is written to your terminal or logging mechanism to alert you about the REST API URL requirement. You can use the CLC Utility to set the URL.

If issues occur when working with CSM features that rely on the Cherwell REST API, you can configure event logging in the Cherwell Server Manager.

Learn more ...

### **Related Item Navigation**

#### Ideation Station Feature

Related Item Navigation is a new way for users to easily view and interact with a Major Business Object's related Business Objects. You can enable Related Item Navigation for any Major Business Object. CSM provides related items for third-party Slack chat, solution search, attachments, and communication, but you can add more related items for any related Business Objects.

Learn more ...

🖸 Save 🖉 Cancel	🅢 Refresh	🛞 Delete 🔒	Unlocked	🖉 Attach (0	, ▲  <	<	Record 2 of	f 19	>	>	🖂 Not queued 🔻	:
(P3)	P3 INCIDENT 102237 IT Service Desk > Report Outage or Error > Submit Incident											
STATUS	RESPO	NSE BREACHED		RESOLVE WITHIN			PENDING R	REASON				
Pending	1/18/	2020 11:31 PM		35 days 2 ho	urs		Need da	ita fron	n Custo	omer		
Next: Remove Pending	<u>s Status</u>						Review:	2/4/20	20			
Overview	Activity	Journals	1	āsks (0)	Related	Change	Re 🕨	•	Solu	ution S	earch	
Customer *				Additiona	al Ques	tions			Cus	tomer	History (1)	
Susan Malach		₹. [	2 <b>2</b> 2	No additional i	nformation	for this re	quest.		Sim	ilar Inc	idents (3)	
Description *			_						Rela	ated CI	s (1)	
PC Will not start									Sus	an's Op	pen Incidents (1)	
				Contin	ue scrollin the	g down to form.	o complet		Rela	ated Pr	oblem	

For example, the new Related Item Navigation **Solution Search** tab in CSM Browser Client allows you to run a search for an existing solution to an issue without leaving the current record. The Search Results display matching Knowledge Sources by relevancy. You can view all matching Sources or filter by selected Sources.

•	Related Items	
	Solution Search	
	computer	Q
	Internal (3)	Saved (0)
		Filter
	Known Errors	
	<u>10223</u>	:
	Misc. Software	
	12/16/2019 2:48 PM	
	<u>10168</u>	:
	Accounting System	
	2/16/2019 10:14 AM	
	Open Incidents	
	No records found.	
	Knowledge Articles	•
	<u>10344</u>	:
	Internet	
/hat's Nev	To resolve this error: A insesmanoan to be establ is now in offline mode, 2007: Note: This error internet or network cor	lished. HTTP://URL in MS Outlook occurs when the

When typing in the **Search** field, the most recent searches that have been run against the current record will display in a list below the field, with the most recent searches at the top of the list. This allows a Technician to easily see what terms have already been searched by any user for the current record.

When a Solution Search is executed, a Journal entry is logged in the Activity pane.

Depending on your configuration, the following actions may be available in the vertical ellipses menu: Open in New Tab, Copy Link, Save Result/Remove Saved Result. When you select **Save Result** or **Remove Saved Result**, it is added to or removed from the **Saved** tab and a Journal entry is logged.

This feature has replaced the Knowledge option previously available in the CSM Browser Client toolbar.

Learn more ...

A new **Solution Search Properties** window allows an Administrator to configure the Knowledge Sources, Fields, and Actions displayed in Solution Search for each Major Business Object.

Ø	Solution Search P	roperties	_ <b>D</b> X
Internal Sources	Solution Search P Internal Sources (Incide Solution Search properties for internal knowled Knowledge Source: Display Fields for Field	nt) ge sources.	<ul> <li>Add</li> <li>Remove</li> <li>Image: Add</li> <li>Remove</li> </ul>
	<ul> <li>☐ Includes Label</li> <li>Select Actions Available to Users:</li> <li>✓ Open in New Tab</li> <li>✓ Copy Link</li> <li>✓ Save Result / Remove Saved Result</li> <li>④ Help</li> <li>Full-Text Indexing must be enabled for the selected Busine</li> </ul>	ess Object for Search Results to display.	Cancel

As a best practice, follow the configuration workflow.

#### **Form Improvements**

#### Custom Error Messages on Required Fields

Ideation Station Feature

Administrators can now add custom error messages to required Fields. You can choose from a most recently used message, a Stored Expression, or a Custom Expression. When a required Field is not entered and a User tries to save the Field, the custom error message displays.

0	Field Properties
General	Properties (Incident_Assigned Team field) Set required, read-only, default value, calculated and save properties for the field. Press on the arrows () for more options
Process & Procedure Help Properties	Image: Required for save   Always required for save   Image: Never required for save   Image: N
Validation/Auto- populate	Read-only   Default value:   Calculated value   Value to set before save:
	<ul> <li>State</li> <li>Required for Closed state</li> <li>Value to set for Closed state:</li> <li>Required for state change' changes based on lifecycle</li> <li>Value to set before state change' changes based on lifecycle</li> </ul>
	OK Cancel

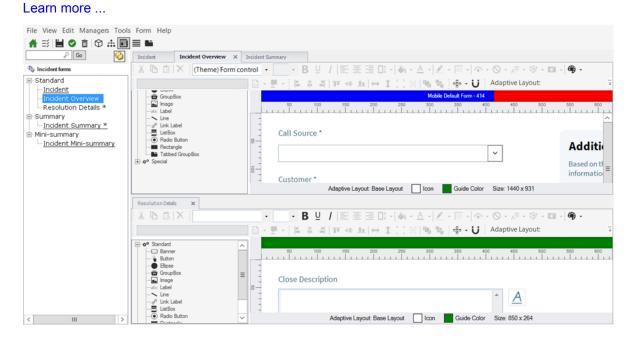
#### Learn more ...

#### Simultaneous Form Editing

Using the Form Editor, you can now edit multiple Forms simultaneously. Forms are now displayed in a new tabbed view that lets you:

- Copy and paste single or multiple Controls between Forms.
- Float/dock tabs to view Forms side by side or in separate windows.

All Forms, of all Form types, for the selected Business Object are displayed in a Forms list.



## **Expanded Integration Capabilities**

#### • External Tools Integrations Using Webhooks and One-Step™ Actions Ideation Station Feature

#### Ideation Station Feature

You can now integrate with external tools using HTTP POST methods to send data to a CSM webhook endpoint. A One-Step Action assigned to each endpoint determines how the data is consumed by CSM. For example, use a webhook to update a CSM Incident with information from a Jira issue based on a defined event in Jira. Once the Jira event is triggered, data is sent to the new System Event Processing Service, which fires a One-Step Action to update mapped fields in the CSM Incident.



The System Event Processing Service is disabled by default and must be manually enabled before webhooks can be processed. In addition, a new security right controls access to the Webhooks Manager. Users can be granted rights to view, add, edit and delete rights to the Manager.

#### Learn More ...

• Slack Chat Integrations Ideation Station Feature Two methods of integrating Slack with CSM are now available:

Webhooks Integration

Configure webhooks to run One-Step Actions based on commands sent from Slack. For example, users can create, withdraw, or check the status of Incidents from a Slack channel.

Learn more ...

Learn more ...

#### • Related Item Navigation Integration

Create Slack channels from the CSM Related Items pane for any Major Business Object record. This enables users to view and participate in discussions in Slack without leaving CSM.

Þ	Attachments	Communication	Chat	
	Channel Name:	incident-102196		ø
	Are you still having	the printer issues?		
	C			

Learn more ...

Learn more ...

The Slack integrations can be used on their own or together to seamlessly manage communications with CSM.

## **Cherwell Virtual Agent (CVA) Support**

#### Ideation Station Feature

Several new features pave the way for future increased support for artificial intelligence, third-party connections, and natural language interaction between users and CSM. These new features can be used standalone or with the Cherwell Virtual Agent (CVA). For more information about CVA, contact your account representative.

#### Enhanced Browser Widget

The Browser Widget was enhanced to allow you to define a URL, POST URL, and POST Body including the use of tokens (Stored Values, System Functions, or Expressions). You can store a response from a POST request as a Stored Value, with the most recently used Stored Values available for selection in the Store Response drop-down list.

3	Widget	X
<u>N</u> ame: Browser	Type: Browser	
Browser		
Browser Settings		
O HTML page		
Web Site		
URL:		
http://www	/.cherwell.com	
Refresh every	5 Minute(s) -	
Execute POST	before widget load	
POST URL:		
POST <u>B</u> ody:		
Store Result		
Info	Save As	Cancel

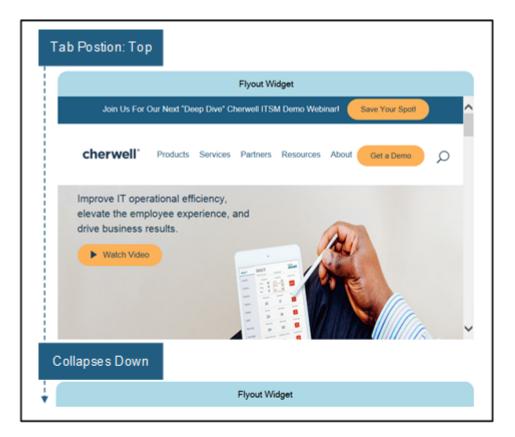
## • Flyout Widget Ideation Station Feature

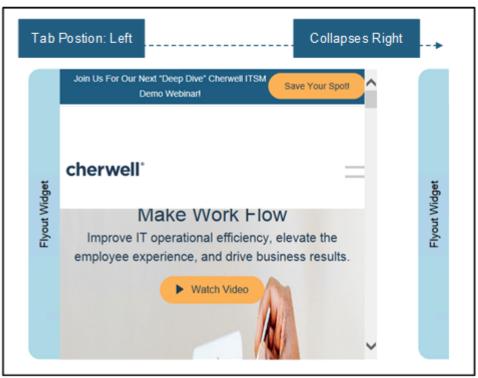
You can now create a Flyout Widget, which is similar to the Browser Widget, but it also collapses to a tab and expands to display an HTML Page or website. You can define a Flyout Widget's URL, POST URL and POST Body including the use of tokens (Stored Values, System Functions, or

<b>∧</b>	Widget X
Name: Flyout	Type: Flyout
Flyout	
Tab Settings       Tab Text       Flyout Widget       Tab Size       40       px	Tab Position Top • Left O Right
Tab Color LightBlue	O Bottom
Browser Settings O HTML page  Web Site	
URL:	
http://www.cherwell.com	Browse
Refresh every 5 Minute(s) -	
Execute POST before widget load	
POST URL:	
POST <u>B</u> ody:	
Store Result	· · · ·
Info	Save Save As Cancel

Expressions). You can store a response from a POST request as a Stored Value, with the most recently used Stored Values available for selection in the Store Response drop-down list.

You can also define the tab's text, size, color, and position.





#### System Functions

Three new System Functions are available to be used with the Browser Widget or Flyout Widget when defining the POST Body.

- **CurrentUserAccessToken()** is defined for the current user on login to the CSM Browser Client or CSM Customer Portal.
- **CurrentUserAccessTokenExpiryUTC()** is the date of the current user's access token expiry UTC.
- **CurrentUserRefreshToken()** is the current user's refresh token defined on refresh in the CSM Browser Client or CSM Customer Portal.

Learn more ...

## **Sentiment Expression**

You can now create a Sentiment Expression to determine the sentiment of text that returns a numerical value you can use to perform calculations. For example, a technician can review the sentiment of messages sent back and forth to customers and evaluate the frustration a specific customer experiences over time.

O	Expression
<u>N</u> ame:	
Description:	
Editor:	Sentiment  Aggregate Case
Expression:	Counter Date/Time Duration
1	Logical  Number Sentiment
	User/Customer Data Save Save As Cancel

Learn more ...

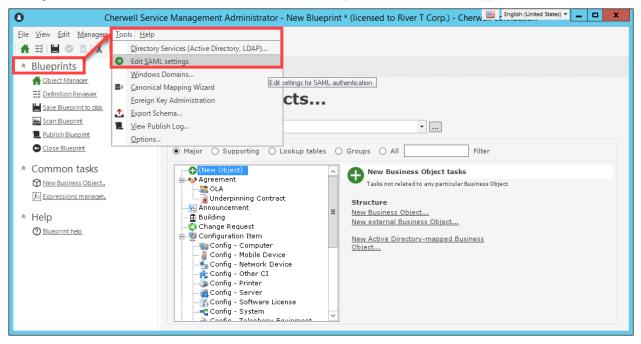
## Automatic User Imports From SAML

Ideation Station Feature

You can now configure automatic user account creation and updates in CSM when users log in using SAML. Control the user data and group membership passed to CSM by mapping ADFS attributes to Business Object fields and Active Directory security groups to CSM Security Groups.

This feature is only supported when SAML is configured with Microsoft ADFS and when Windows Login IDs are used to identify users in SAML.

To support Business Object field mapping required for automatic user imports, SAML configuration settings have been moved to the Tools menu for the Blueprint Editor and the mApp Editor.



Learn more ...

## Approvals Operations added to Cherwell® REST API

Four new operations for Approvals have been added:

- Action an Approval.
- Get an Approval.
- · Get all waiting Approvals for the current user.
- · Get all waiting Approvals that were created by the current user.

These new operations mean that workloads for Approvals can be managed efficiently within CSM.

Approval : Perform operations on Approval Objects	Show/Hide List Operations Expand Operations
POST /api/V1/approval/{approvalRecId}/{approvalAction}	Action an Approval
GET /api/V1/approval/{approvalRecId}	Get Approval
GET /api/V1/getmyapprovals	Get all waiting Approvals for the current user
GET /api/V1/getmypendingapprovals	Get all waiting approvals that were created by the current user

#### **Miscellaneous Improvements**

#### Record Limit Changes for Grids in the Browser Client

All Grids in the Browser Client, except those in Form Arrangements, now display a maximum of 20,000 rows of data even if there is more data available. If there are more than 20,000 rows of data available for a Grid, the Grid will list the total number of records available. When you export a Grid as a .csv file, all rows of data are included in the exported file. You can export .xlsx (Excel) files from Grids, but the exported file reflects the displayed Grid and is limited to a maximum of 20,000 rows of data.

#### Use Save As to Create an Edited Copy of an Item

Item Managers in CSM include the Business Hours Manager, Dashboard Manager and Search Manager. Many Item Manager dialogs now have a Save As button. This means you can make changes to an existing item displayed in a Manager dialog box and be able to save these changes for an entirely new Item without having to create anything from scratch.

<i>∽</i>	Widget ×
Name:	Type: 🛃 Chart 🔹
Chart Default title: Refresh every 5  Minute • Exclude from filters	70 60 50 40 30 20 10 12/15/2015 12/17/2015 12/18/2015 12/19/2015 12/20/2015
Series   Series   ▲   × axis   ★   Y axes   Legend	
Note: Only 2D chart series a	
Info	Save Save As Cancel

## View One-Step<sup>™</sup> Actions by the Sub-Actions They Contain

You can now view One-Step Actions by the Sub-Actions they contain. A One-Step Action will appear in all Sub-Action folders that it contains, so a One-Step Action could be listed in multiple Sub-Action folders.

$H_{\rm eff}$	One-Step Action Ma	anager	Englis	h (United States) •		x
<u>F</u> ile <u>E</u> dit <u>V</u> iev	v <u>H</u> elp	_	Sear	ch	•	Go
0 🖊 🗹	<u>l</u> con			<b>~</b>		
🕈 🖸 One-Ste	<u>L</u> ist Details				11	
. Elue	Show One-Step Actions for all my Roles	ord plates	Service Requ	Workflow Actions	Clone Current Incident	
<ul> <li></li></ul>	Show One-Step Actions for all Roles					
🕀 💼 One	Show One-Step Actions for all Users Show One-Step Actions for all Teams	ate a	Filter SCTs	Follow-up	Go to Record	
	Show One-Step Actions for Customer Workgroups	al No		E-mail		
	Show One-Step Actions by Sub-Action	lved	Set Incident	Set Incident to		
	<u>F</u> ind dependencies	mation	Status to	Priority One		
Items in this fold	er are available to all users of the system.					
					Close	

## Administrative Improvements

#### Trusted Agent Compatibility Check

CSM now logs when a Trusted Agent running on a different version of Cherwell is attempting to communicate with the Trusted Agent Hub. These log messages are ERROR level and appear in the Trusted Agent Hub logs. The log messages will alert you if you need to upgrade an older version of the Trusted Agent after you've upgraded the Trusted Agent Hub.

#### Runtime Performance Warnings added to Health Check Tool

A new rule called Runtime Performance Warnings has been added to the Health Check Tool. This means that any performance messages that occur during runtime over the previous week are now captured and made accessible when you run the tool.

	untime Performance Warnings Shows all performance warnings occuring in the system since the last time HealthCheck was run.							
First 20 Performance Warnings By Category: Relationship								
MessageCategory	MessageDetail	CreatedDateTime						
Relationship	Relationship 'Incident Owns Journals' on SusinessObject 'Incident' retrieved 1030		10/16/2019 2:32:07 PM					
Report								
MessageCategory	MessageDetail		CreatedDateTime					
Report	Report 'Incidents by Source of Call' is set to retrieve RichText fields. This will	\$	10/24/2019 2:57:41 PM					

## **Documentation Changes for System Reliance**

As part of an ongoing effort to improve technical documentation related to system configuration, performance, monitoring, security, information for the following subjects is now available:

• Improved Guidance for Running Performance Health Checks Learn about monitoring and optimizing system configurations that impact performance. Find and fix performance issues.

Learn more ...

Improved Guidance for Analyzing RabbitMQ Logs and Dashboards

Learn about monitoring queues, analyzing messages, and monitoring metrics generated by the Cherwell Message Queue Service.

Learn more ...

Performance Impacts of Blueprint Changes

Learn about the changes to Business Objects that may cause database tables to be rebuilt during the publish process. This can extend the amount of time it takes to complete the publish process, especially for Business Objects that contain a large number of records. This may impact system performance and cause some Business Objects to be unavailable.

Learn more ...

#### CSM Integration Options

Learn about built-in integration tools that help you import, export, or link information between two systems. Options for performing actions that are triggered by an external tool or by CSM are also provided.

Learn more ...

MSP Deployment and Configuration Options

Learn about CSM deployment options for managed service providers. Choose between simple access deployment or segregated tenants, depending on the level of access and customization required by the tenants weighed against the cost of configuring and maintaining the system.

## Updated Branding and Corporate Identity

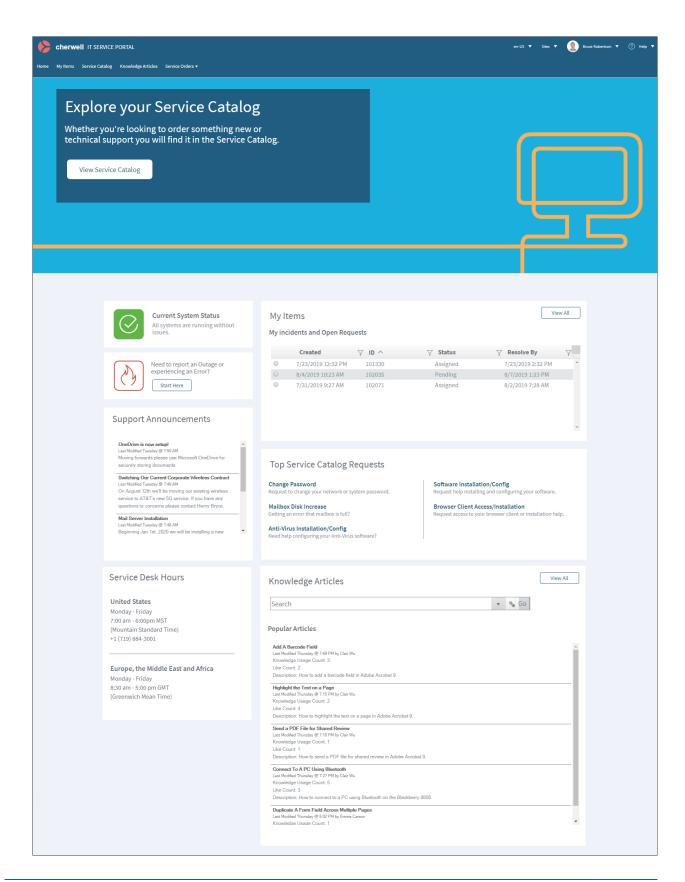
The Cherwell Service Management branding and corporate identity has been updated throughout the CSM Suite.

Name	Locations	Images
CSM Customer Portal Login	CSM Customer Portal	Cherwell Web Portal         User ID
CSM Browser Client Login	CSM Browser Client	Cherwell Browser Client         User ID

# **Overview of New OOTB Content for CSM 10.0.0**

## **OOTB Portal Home Page Redesign**

The OOTB Portal Home page was enhanced with a new look and feel. The new Portal Home page has a consistent design similar to the rest of the CSM platform.



## **Change Management Updates**

The updated Change Request Business Object and associated Change Management features introduce a streamlined Change Request form, ITIL-aligned Change Request lifecycle, advanced risk assessment, updated Approvals, and an updated Change Management Dashboard.

STATUS	PROPOSED START DATE	PROPOSED END I	TATE	PEOL	ESTED BY	Last modified by	y Henri Bryce on 1/15/20 ASSIGNED TO	J20
Approval	2020-01-15T00:00:00	2020-01-16T			d Vargas		Gina Mehra	
Next: Scheduled				Davi	d.Vargas@Riv	erTCorp.com	IT Management	
Normal Change	Activity Services	Affected (1)	Journals Tasks (0)	Current Approvals (5 Waiting)	Appr	oval History	Problems (1)	
Classification						Stage		
Requester *			Title *			<ul> <li>Classify</li> </ul>		
David Vargas		ā 🖸	Update hard drive space on the file s	erver		<ul> <li>Assessment</li> </ul>	nt	
Change Type *			Description *			> Authorizat		
Normal		•	Users are reporting they cannot access th	e X drive	A	Implemen Review	tation	
Change Model						Closed		
		5 FZ				Approval	Status (Assess	sm
Classify Normal Change *						💮 5 Pendir		
Minor						O Appro     O Appro     O Denied		
			Reason *			<ul> <li>O Abstai</li> </ul>		
Primary Configuration Ite			Incident/Problem Resolution	V		Actions		
File Server	=	ā 🖸 🖁	Proposed Start Date			Assign to me		
Assigned Team *		-	1/15/2020 12:00 AM	±€.	(!)	Link to an exis	ting Problem	
IT Management		•	Proposed End Date		-	Link to an exis		
Assigned To			1/16/2020 12:00 AM			Create a Chan	ge Model	
Gina Mehra		•						
Impact		ority *	for this CI or Service!	not in the normal maintenance w	indow			
Individual 🔻 +	Support Service = P3		Would you like to propose r Emergency Change?	new dates or create an				
Service Affected *			Clear Proposed Dates					
Account Management	=	ā 🖸	Create Emergency Change					
Service Importance			CI Calendar					
Support			View Change Calendar View Collision Detection					
			Review Date					
			2/25/2020 12:00 AM					
Risk and Plannin	σ							
	Б		lustification *					
Implementation Plan			Justification * Ran out of Space					
Acceptance Criteria			Validation Plan					
Implementation Notes			Backout Plan					
<ul> <li>Outage Required</li> </ul>			Impact Assesment					
Outage Start Date *								
s New in CSM 1	0.0.0?							
Outage End Date *								
outage chu Date								

## **Redesigned Supporting Business Object and Lookup Table Forms**

Numerous Supporting Business Object and Lookup Table forms were updated in this release. The redesigned forms offer the same modern interface that was introduced in recent releases. The following example is the updated Approval form:

Approval 11058	Status
Approver	Waiting
Gina Mehra 🔻	
Approval Team	
•	
Due Date	
M/d/yyyy h:mm tt	
Details	
Assessment Approval	
Users are reporting they cannot access the X drive	
Approver Notes	
Abstain Deny Approve	I

A partial list of updated forms is listed below:

- Agreement Status
- Approval
- Change Reason

- Change Request Final Disposition
- Change Request Risk Text
- Change Status
- Change Status List
- Change Type
- CI Downstream Relationship
- CI Upstream Relationship
- Completion Code
- Customer Internal Employee Status
- Customer Management
- Customer Status
- Event Status
- Product Area
- Request Type
- SCT WU Category
- Service Cart Status
- Service Classification
- Service Impact Category
- Service Impact Subcategory
- · Service Importance
- Service Type
- Service Service Type
- Service Page Display
- Service Status
- Site Status
- Specifics Email Connection Type
- Specifics Email Type of Connection
- Specifics Presentation Hours
- Specifics Presentation Minutes
- State Province Territory
- Supplier Category
- Supplier Status
- Task Hold Reason
- Task Status List

- Task Type
- Team Info Type
- User Testing User Testing Disposition
- UserInfo
- Validation Type
- Virtualization Software Type

## **Knowledge Article Enhancements**

#### Ideation Station Feature

The following enhancements were made to Knowledge Articles:

- Added the ability to schedule Knowledge Articles to publish on a future date.
- Added the ability for Administrators and Knowledge Managers to skip the Knowledge Article Workflow and publish immediately.
- The Knowledge Article Source field now reflects the Business Object the article originated from (example: Incident or Problem) when Submit to Knowledge Base is used from the Business Object.
- Added tiered security levels related to Knowledge Articles, including Security Groups and Teams.
- Knowledge Article is now a Group Object containing the Knowledge-IT Business Object.

Learn More...