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CSM 10.5.0 Essentials

Legal Notices

The Cherwell Software product suite includes:

- Cherwell Service Management
- Cherwell Asset Management

Contact Cherwell Software

Contents

Essentials

When getting started with CSM, it is important to understand its main components: applications, features, processes, and records.

Related concepts

CSM Features

Client Suite

System Administration

Release Notes

What is Cherwell Service Management?

Cherwell Service Management (CSM) helps teams implement, automate, and upgrade service and support processes. CSM includes the Cherwell Core platform and OOTB content that provides predefined functionality and designs.

CSM supports process customization that allows departments to tailor the solution according to their native workflow processes. CSM provides users with multiple ITIL-verified methods such as incident, problem, request, and event management. It also enables users to leverage ITIL service transition processes including change, configuration, and release management.

Cherwell Core is a purpose-built no-code development and delivery platform that serves as the logical foundation for Cherwell's ITSM solution; ESM (enterprise service management) solutions such as HR and Facilities; and custom-built workflow applications. The platform is designed to support any combination of pre-built and custom-built applications to meet an organization's service management requirements.

You can request a demo of CSM to find out more.

- **Engagement Services**: In addition to client applications (CSM Desktop Client and CSM Browser Client), CSM provides multiple avenues for customer engagement. Customers can call or visit a service desk, access the portal via laptop or mobile device, send an email, tell the optional Cherwell Virtual Agent (CVA) what's happening, or open an incident in Slack.
- **Automation Engine**: Automating workflows is the heart of the Cherwell Core. Cherwell provides process workflows and supporting capabilities for ITSM, HR, Facilities, PPM, Security and other solutions that run on the common platform.
- **Integration Services**: CSM provides several ways to import data or perform actions based on events in an external tool or CSM. Options range from lightweight with no programming experience required to more complex, such as the Cherwell REST API.
- **Dashboard Analytics**: Dashboards enable users to spot trends, eliminate bottlenecks, and comply with service delivery guidelines. Comprehensive reports help highlight key accomplishments, quantify outcomes, and identify areas for improvement.
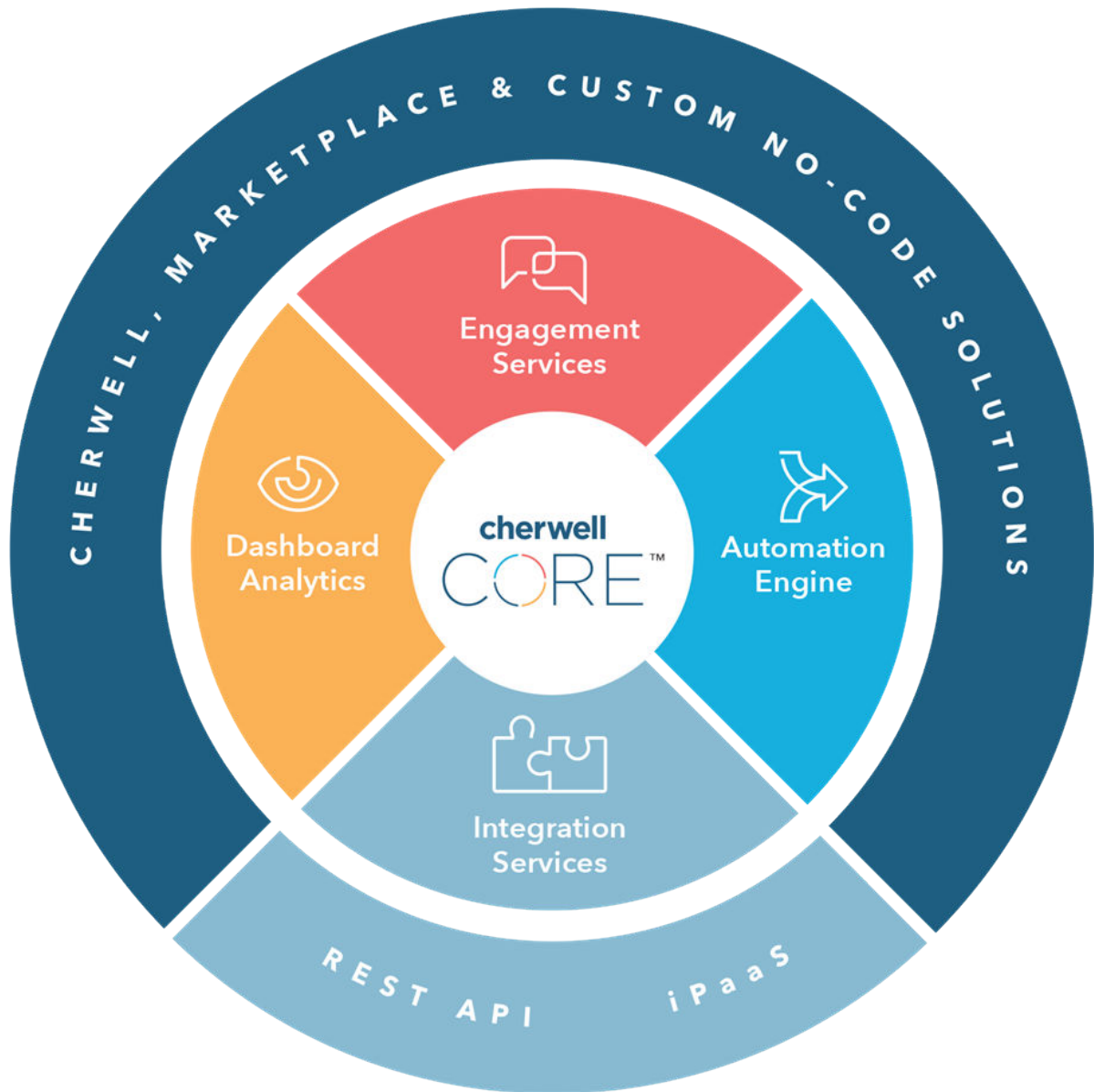
Related concepts

CSM Clients and Applications

CSM Features

ITSM Processes

The Relationship between CSM and ITIL

The Relationship between CSM and SIAM

The Relationship between CSM and ITIL

CSM supports multiple industry-certified ITIL® processes.

• **Incident and Service Request Management**

Incident Management is the process that ensures that Services are restored as quickly as possible. The key aim of Incident Management is to restore something that is broken or disrupted for users as quickly as possible. This troubleshooting process is designed on a three-stage basis, as first, second, and third level.

Service Request Management fulfills requests for information or access to a Service. Examples include resetting a password, granting access to a printer, or providing standard setup services for a new employee.

• **Problem Management**

Problem Management proactively prevents incidents from happening and minimizes the impact of incidents that cannot be prevented. Problem Management ensures that the root cause of multiple incidents is resolved as quickly as possible.

• **Change Request Management**

Change Management is the process responsible for controlling the lifecycle of all changes, enabling beneficial changes to be made with minimum disruption to IT services. Change Management ensures that changes are recorded, classified, scheduled, implemented, and reviewed to minimize service disruption to the company.

• **Service Asset and Configuration Management**

Service Asset and Configuration Management ensures that the assets required to deliver services are properly controlled, and that accurate and reliable information about those assets is available when and where it is needed. This information includes details of how the assets have been configured and the relationships between assets. A Configuration Management Database (CMDB) process ensures that all Configuration Items are effectively managed and stored in the Configuration Management Database (CMDB).

• **Service Management**

IT Service Management (ITSM) refers to the implementation and management of quality IT services that meet the needs of the business. ITSM helps you capitalize on the ability of your IT Department to provide quality Services that are cost-effective and meet the expectations and needs of the business, such as reducing cost of operations, improving service quality, improving user satisfaction, and improving compliance.

• **Service Level Management**

Service level management negotiates achievable service level agreements and ensuring that these are met. It is responsible for ensuring that all IT service management processes, operational level agreements, and underpinning contracts are appropriate for the agreed service level targets.

Service level management monitors and reports on service levels, holds regular service reviews with customers, and identifies required improvements. Service Level Management ensures that Service Level Agreements (SLAs) are carried out appropriately.

- **Knowledge Management**

  Knowledge Management shares perspectives, ideas, experience, and information, and ensures that these are available in the right place and at the right time. Knowledge Management enables informed decisions and improves efficiency by reducing the need to rediscover Knowledge. Knowledge Management ensures that all Knowledge in your CSM Knowledge Base is efficiently gathered, approved, stored, and shared with Users and Customers. In CSM, Knowledge is stored mainly in Knowledge Articles (KAs) but can come from other Knowledge Sources as well, including Business Object records, attachments, and web sources (example: Google or YouTube).

- **Release Management**

  Release Management is the process responsible for planning, scheduling, and controlling the build, test, and deployment of releases, and for delivering new functionality required by the business while protecting the integrity of existing services. Release Management ensures that builds are created, tested, and deployed without affecting the stability of existing Services.

- **Project Management**

  An IT Project is a temporary organization, with people and other assets, that is required to achieve an objective or other outcome. Each project has a lifecycle that typically includes initiation, planning, execution, and close. IT Project Management ensures that Projects are completed on time using the appropriate resources.

For more information on ITIL, see the Explaining ITIL free Video Learning Library course.

Related concepts
ITSM Processes

The Relationship between CSM and SIAM

Multi-Sourcing Service Integration (MSI) and Service Integration and Management (SIAM) are approaches used to manage the delivery of services using multiple suppliers.

Using these approaches, IT managers can coordinate multiple suppliers (internal and external), available services, and potential risks, while hiding the complexity of the process from customers by providing a streamlined experience.

CSM supports multiple processes related to MSI/SIAM, including:
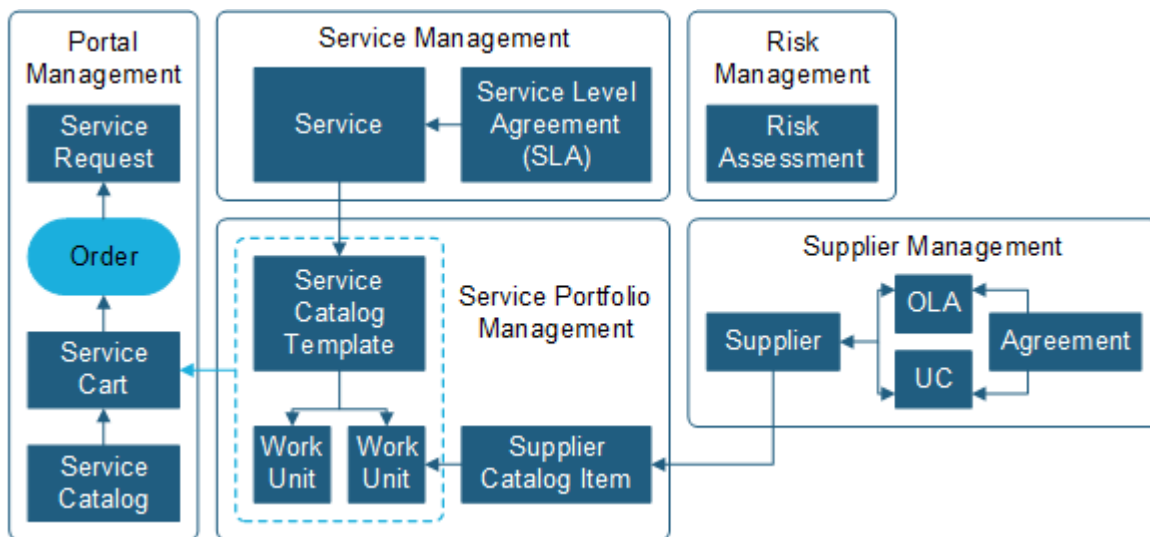
- **Supplier Management**

  Supplier management is the process responsible for obtaining value for money from suppliers, ensuring that all contracts and agreements with suppliers support the needs of the business, and that all suppliers meet their contractual commitments. Supplier Management allows users to onboard and offboard multiple suppliers (internal and/or external) and manage their individual lifecycles, which includes defining information, creating agreements, and assessing performance. Business Objects that support Supplier Management include Scorecard, Supplier, and Agreement.

- **Risk Management**

  Risk Management identifies, assesses, and controls risks. Risk Management allows organizations to minimize risks associated with suppliers by defining and tracking factors that could affect the delivery of a service. The Business Object that supports Risk Management includes Risk Assessment.

- **Service Management**

  IT service management (ITSM) refers to the implementation and management of quality IT services that meet the needs of the business. ITSM helps you capitalize on the ability of your IT department to provide quality services that are cost-effective and meet the expectations and needs of the

business, such as reducing cost of operations, improving service quality, improving user satisfaction, and improving compliance. Business Objects that support Service Management include Service and SLA.

• **Service Portfolio Management**

Service portfolio management manages the service portfolio and ensures that the service provider has the right mix of services to meet required business outcomes at an appropriate level of investment. Service portfolio management considers services in terms of the business value that they provide. Service Portfolio Management allows organizations to create and manage a comprehensive set of service offerings for customers. Business Objects that support Service Portfolio Management include Service Catalog Template, Supplier Catalog Item, and Work Unit.

The Difference between Cherwell Core and Out-of-the-Box Content

CSM provides two layers of data: Cherwell Core, which is the platform on which CSM runs, and out-of-the-box (OOTB) content, which is provided as a starting point for all installations.

- **Cherwell Core Platform**

  The underlying layer of CSM that sits on top of the SQL server and provides the tools used to create and customize the functionality and design of your CSM system. Use the System Upgrade tool to upgrade Cherwell Core without affecting data.

- **Out-of-the-Box (OOTB) Content**

  Predefined functionality and design that is applied with new installations on top of the platform. Typically, system administrators modify the OOTB content to fit the needs of their organization. OOTB content cannot be upgraded without overwriting existing data, but system administrators can apply new functionality to their system either manually or using mApp Solutions.
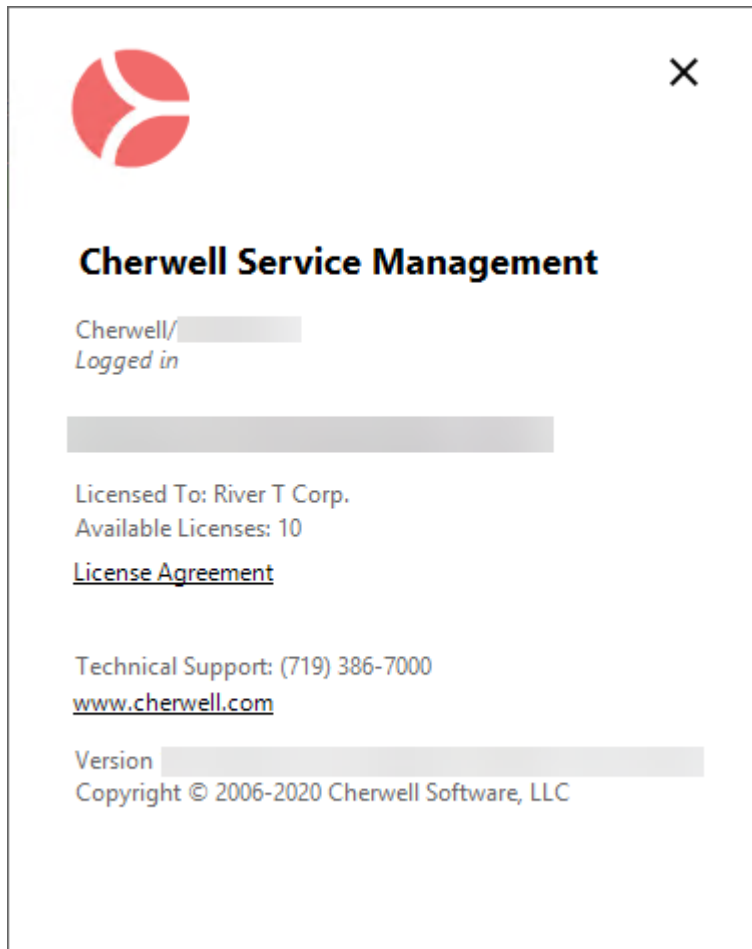
The following figure shows the three layers of CSM: content, Cherwell Core, and SQL Server.
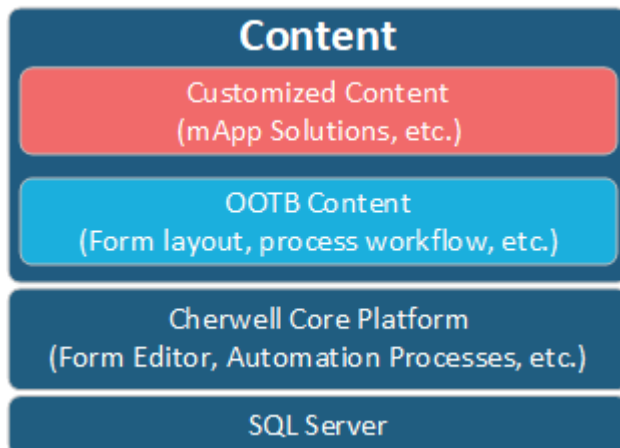
Find the CSM Platform Version

To determine which platform version you are using:
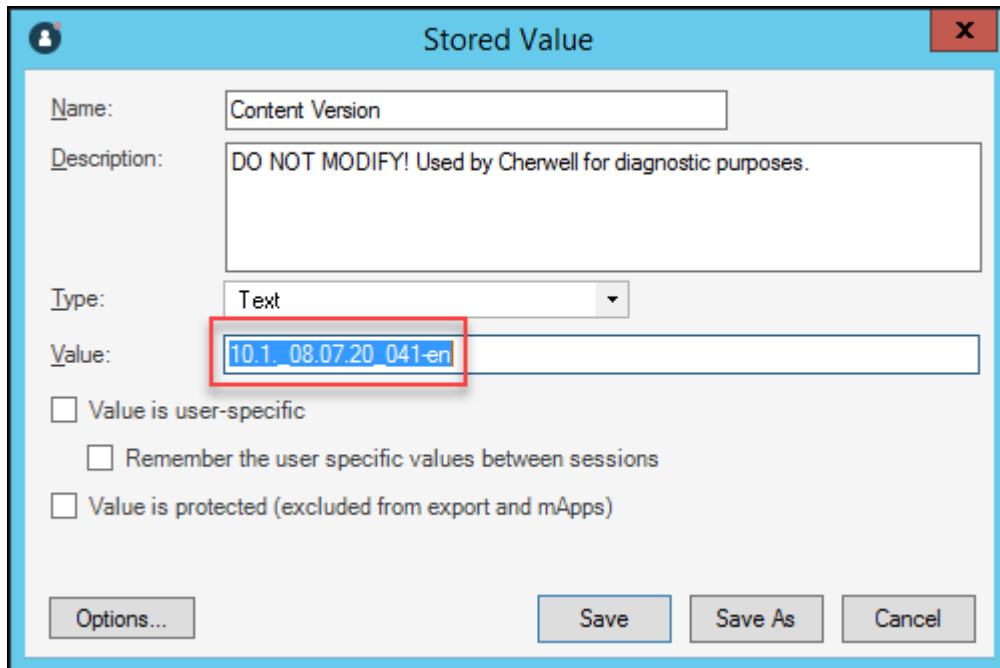
1. On the CSM Desktop Client or CSM Administrator menu bar, select **Help > About**.
   The version number displays in the window.

Find the OOTB Content Version

To determine which OOTB content version you are using:

1. In CSM Administrator, create a Blueprint.

2. On the menu bar, select **Managers > Stored Values**.

3. Select the **Blueprint** scope.

4. Right-click the **Content Version** Stored Value, and then select **Edit**.
   The version number displays in the Value field.

Note: Do not edit the **Value** field.

CSM Features

CSM provides a variety of configurable features, including Business Objects, dashboards, One-Step™ Actions, searching, reporting, and knowledge management.

Make CSM work for your organization through record management, supporting functionality, automation, security, and business intelligence.

Data Building Blocks

Business Objects are definition-powered business entities that store data to help organizations manage their various workflows and business processes. For example, the Incident Business Object embodies everything about an Incident (who initiated it, how it is categorized, to whom it is assigned, etc.). Use Business Objects as-is, or customize or create your own by building fields, forms, relationships and more.

Leverage Supporting Functionality

Cherwell knowledge management captures, federates, reconciles, and translates real-time IT infrastructure information to create a single trusted knowledge base of actionable intelligence that lets you and your business users solve problems quickly and efficiently.

A Blueprint is a working copy of changes to your CSM system definitions (Business Objects, fields, forms, grids, etc.) that allows you to make offline changes and then publish them to your live system later.

Use mApp® Solutions to create, share, and install bundles of functionality (Business Objects/fields, forms, grids, relationships, Actions/One-Step Actions, saved searches, etc.) across databases.

CSM provides a mighty search engine and a host of search tools to help you efficiently and thoroughly search and filter your data to locate a specific record or a set of files.

Simplify via the Automation Engine

One-Step Actions, built into CSM, allow you to create simple or complex workflows without coding or scripting. With One-Step Actions, you can initiate one or more defined actions, such as sending email notifications, prompting knowledge article review, changing the status of records, warning staff of untouched tickets, and more. By utilizing One-Step Actions, you can automate processes without relying on costly development resources, allowing your team to deliver services more quickly and cost-effectively and freeing up staff to focus on more strategic initiatives. Action Blocks are reusable sets of Actions you can use in One-Step Actions across your Business Objects.

Use Adaptive Layouts to design forms and dashboards that adapt to different dimensions, providing optimal user experiences across a range of devices.

⊕	New form...		
✕	Delete this form...		
✓	Make this the default standard form...		
▣	Form properties...		
⬪	Change theme...		
⫶	Form wizard...		
	Adaptive Layouts ▸		Smartphone (414)
		✓	Tablet (750)
⬛	View/set tab order		Base Layout (1150)
✓	Auto-select labels with controls	⊕	Add layout...
✓	Auto-move contained controls	✎	Edit layout...
✓	New control label placement, horizontal	✕	Delete layout...
	New control label placement, vertical		Manage Presets...
✓	Show Rulers		

Tokens are dynamic values that control the interpretation of information and display throughout the system. Use these defined values when designing forms, dashboards, Automation Processes, One-Step Actions, and fields.

Secure CSM

CSM security is robust, granular, and set in layers to secure people, functionality, data, environment, and sharing. Use security groups, roles, and workgroups to tailor access to your data.

Analyze Business Intelligence

A dashboard is a configurable, interactive, and insightful console capable of initiating commands and Actions. Dashboards provide real-time, at-a-glance information through the use of filterable, configurable widgets (Action Catalogs, web sites, buttons and links, and Twitter feeds). Use a dashboard to monitor critical metrics, analyze and predict trends, drill down into data, initiate commands and actions, or display information that might be relevant to a group of users/customers.

Use reports to format and export large amounts of data in the system at a particular point in time. Some of the criteria used to select data can be entered each time a report is run, so you can reuse the report to generate data for different time intervals. You can also schedule reports to run at specific times automatically.

Related concepts

CSM Features

Business Objects

One-Step Actions

Adaptive Layouts

Tokens

About Records

A CSM record is a collection of Business Object data represented as a form and grid. Records are used to track and relay information.

Examples of records include:

- Incident/Service Request
- Problem
- Change Request
- Service
- Knowledge Article

Tour a Record

The layout of most major records is similar, but the data in each record is unique.

Generally, CSM records are made up of four main areas:

1. **Default Form:** Displays important at-a-glance information, such as ID, status bar (current and next status), record ownership, and common operations.
2. **Form Arrangement:** Displays related information organized by tabs. Tabs display content from relationships and additional forms.
3. **Form Area:** Displays the main form fields.
4. **Actions list:** Dynamically displays a list of actions that are available for the current record.

   The following is an example Incident Business Object (represented by a form):

Related concepts

Record Ownership

Record Features and Capabilities

CSM records have numerous features and capabilities such as searching, security, and forms.

All CSM Records

- **Searching**: Quickly locate all records by running a quick search, or search for a particular record or set of records by refining the search criteria to a word/phrase, timeframe, or customer. Use saved search to save/run commonly-run searches. For more information, see About Quick Search and About Saved Searches.

- **Saved Searches**: Use saved searches to quickly locate/filter records, or to automate searching in reports or on dashboards.

- **Security**: Secure records by controlling who can view, create, and edit them. See About Security Groups.

- **Business Object**: Use a Business Object to track records; configure the Business Object to capture/track only what you want.

- **Form:** Use forms to create, edit, and track records. The forms provide important at-a-glance information: ID, status (current and next status), priority indicator, requester, record owner, SLA respond/resolve target times, common operations, and an arrangement area to dynamically display linked records (child records) that are in a relationship with the parent record. See Record Ownership.

- **Workflow**: Use the streamlined workflow to move records from new to closed.

- **Ownership**: Assign each record to a record owner to ensure accountability.

- **Linked Records:** Link child records to a parent record to keep supporting information at your fingertips and to ensure data relationships. Linked child records are visible in the arrangement.

- **Tasks:**: Use linked Tasks to distribute and track individual pieces of work assigned to teams or users.

- **History and Revision tracking**: Use linked Journals to track important status and field changes. For more information, see Incident Journals, Problem Journals, and Change Journals.

- **Rich Text**: Use rich text to complement your descriptions by adding formatting and images/screenshots.

- **Actions/One-Step™ Actions**: Use powerful Actions and One-Step Actions to move records through their workflow, initiate common operations (example: Assign ownership), initiate scenario-specific Actions, and run reports. For more information, see About Actions and About One-Step Actions. Actions/One-Step Actions are available on the record forms (including from the CSM Desktop Client Task Pane and CSM Desktop Client menu bar), and on the dashboards.

- **Dashboards**: Use dashboards to view your critical metrics/data in a single, real-time, control panel. For example, the dashboards display the number of open, reopened, pending, and overdue records; the number of open records affecting VIP customers; the average number of records resolved in a month; the percentage/number of records in each status of the workflow (new, assigned, classify, assess); and the number of records by category.

- **Reports**: Run reports to show up-to-date statistics on most common records, user and team workloads, closure rates, service trends, potential SLA breaches, and more. For more information, see About Reporting.

- **Automation Processes**: Use Automation Processes to automatically close records and to send emails. See Automation Processes.

CSM Clients and Applications

CSM provides a suite of applications to allow you to efficiently configure, manage, secure, integrate, automate, and run your CSM system from any location.

Applications include:

- **Windows Clients**

  CSM Desktop Client and CSM Administrator. See CSM Desktop Client and CSM Administrator.

- **Web Applications**

  CSM Browser Client, CSM Portal, Cherwell REST API, and Auto-Deploy. See CSM Web Applications.

- **Supporting applications**

  Dashboard Viewer, Report Runner, Auto-Deploy, System Restore, System Upgrade, and Test Lightweight Directory Access Protocol (LDAP). See CSM Supporting Applications

- **Services**

  The Cherwell Application Server and the Cherwell Service Host, which serves as a container host for the following microservices: Automation Processes, Email and Event Monitor Service, Mail Delivery, Scheduling Service, and System Event Processing Service. See CSM Services.

The following figure shows how the applications interact at a high level.
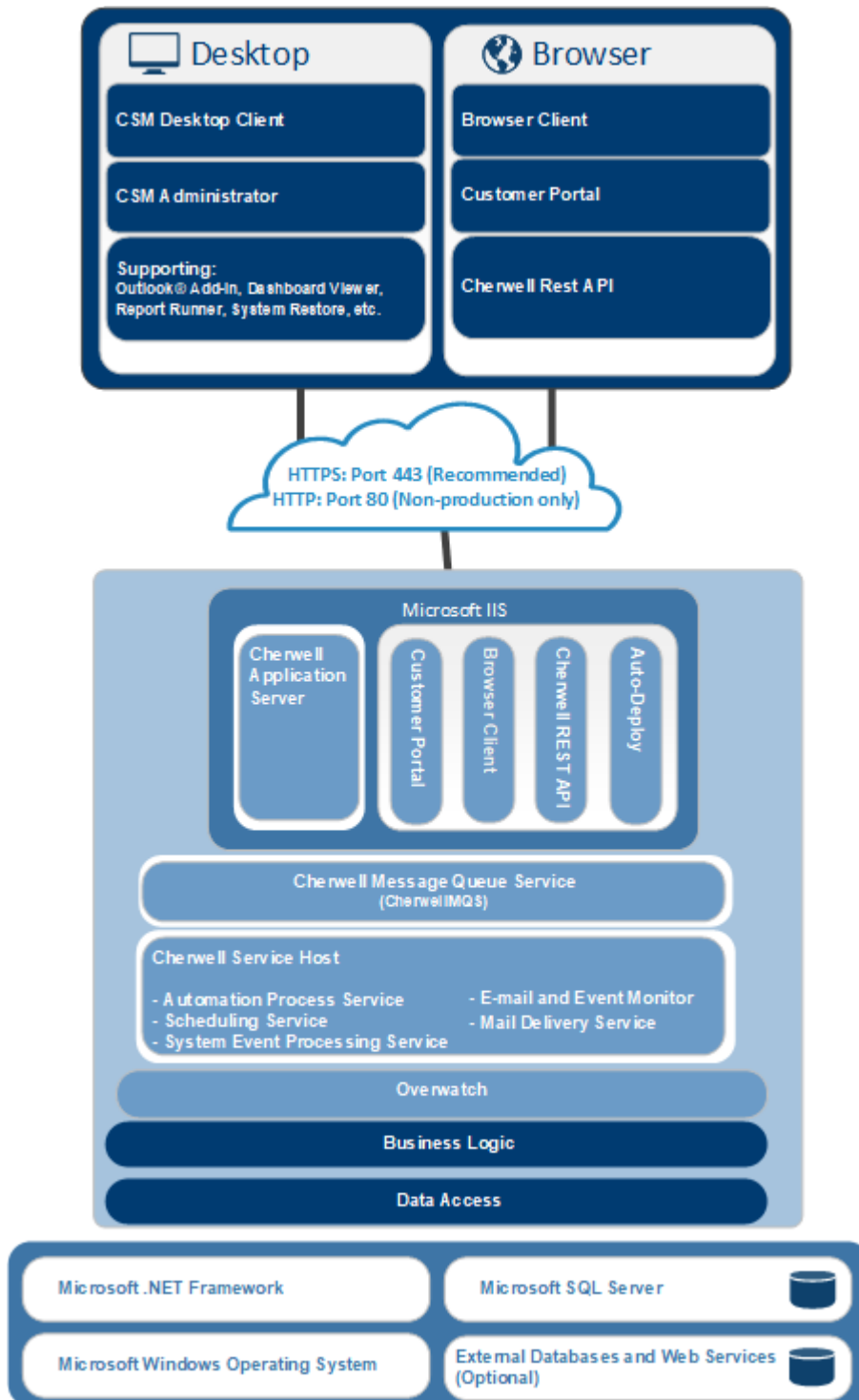
Related concepts

Client Suite

Server Tools
CSM Supporting Applications
About Cherwell REST APIs

ITSM Processes

To enable quick deployment and ensure industry best practices, CSM provides OOTB solutions to support the a variety of service desk processes.

OOTB processes include:

- **Incident/Service Request**: Ensures that Services are restored and requests for information/advice or access a Service are fulfilled as quickly as possible.
- **Problem**: Ensures that the root cause of multiple Incidents is resolved as quickly as possible.
- **Service Portfolio/ Service Catalog**: Allows organizations to create and manage a comprehensive set of Service offerings for customers.
- **Service Asset and Configuration**: Ensures that all Configuration Items are effectively managed and stored in the Configuration Management Database (CMDB).
- **Change Request**: Ensures that Changes are recorded, classified, scheduled, implemented, and reviewed to minimize Service disruption to the company.
- **Knowledge**: Ensures that all Knowledge in your CSM Knowledge Base is efficiently gathered, approved, stored, and shared with users and customers.
- **Supplier**: Allows Users to onboard and offboard multiple suppliers (internal and/or external) and manage their individual lifecycles, which includes defining information, creating Agreements, and assessing performance.
- **Agreement**: Allows users to manage individual Operational Level Agreements (OLAs) and Underpinning Contracts (UCs).
- **Service Catalog Template**: Allows users to manage deliverables that are comprised on Work Units and available to customers from the Service Catalog in the CSM Portal.
- **Work Unit**: Allows users to manage generic tasks that are required to fulfill a Service Request.

Because every organization is different, CSM offers the ability to create, tailor, or delete processes. CSM also offers the ability to quickly merge and integrate additional processes (example: ITPT, Release, etc.).

CSM Core Platform Security

Cherwell uses industry-standard tools, processes, and testing by third-party vendors to ensure security hardening for CSM.

Cherwell performs application testing on a regular basis.

- Web application penetration testing.
- Application code testing and certification with Veracode. Review our certification status at https://www.veracode.com/verified/directory/cherwell.

Verification includes the following release gates:

- Assessment of all open source components.
- Released software does not include very high or high known vulnerabilities.
- Sixty-day remediation deadline for very high and high known vulnerabilities discovered in the latest version of released software. Remediation occurs in next released version of the software.
- Cherwell security champions ensure security coding practices are used across the development life cycle.
- Open Web Application Security Project (OWASP) developer certification.

Cherwell also performs automated vulnerability management and third-party environmental penetration testing of all Cherwell-hosted environments.

Documents explaining our security processes, along with SOC2 and ISO 27001 certification verification, are available on request. Contact your account representative for assistance.

Related concepts
Securing Your CSM Environment
Application Security

CSM Integration Options

CSM provides built-in integration tools to help you import, export, or link information between two systems. There are also options for performing actions that are triggered by an external tool or by CSM.

The integration option you use depends on:

- Where the data you need to import to CSM is stored.
- Whether you need access to real-time data or if a one-time static import will suffice.
- How imports or events are triggered. Do these originate in CSM or an external tool?
- Your programming experience with REST APIs.

Import Static Data

If you do not need to import real-time data into your CSM system, you can import data from a .csv file as needed or schedule periodic imports. You can import Business Object or user data from .csv files.

For example:

- To import data from a legacy Service Management tool, export that data to a .csv file, and then run a one-time import. For more information, see Run a One-time Import of Business Object Data.
- To periodically import new and updated user information from LDAP or another data store, export data to a .csv file on a scheduled basis and use a Stored Import Definition to schedule imports into CSM. For more information, see Importing Users with .csv Files.

Effort level: This is the simplest way to get data into CSM since it does not require ongoing access to an external database or programming experience.

Import Real-time Data

To access real-time data in an external database to import or update Business Object records, use external database connections. This mapping between two database creates a one-to-one relationship with the external data and a CSM Business Object.

You can use this method to import data into existing Business Objects or to link new Business Objects to an external database.

Note: The option to link new Business Objects to an external database is only available for Cherwell on-premises customers.

For example:

- To import physical assets, such as computers or vehicles, consider using the import process since the data may not change often. For more information, see Import External Data in an Existing Business Object and Import External Data into a New External Business Object.
- For more fluid assets, such as software assigned to physical assets, create a new Business Object and link it to your external database. This ensures that real-time data is consistent in CSM and the external database. For more information, see Link External Data to a New External Business Object.

Both approaches have pros and cons that you should consider. For more information, see About Imported Data and Linked Data.

Effort level: This method is more complex that .csv imports because it requires access to an external database, but you do not need programming experience. If you choose to import data rather than link databases, you may need to schedule periodic imports to refresh data.

Trigger External Events from One-Step™ Actions

One-Step Actions provide a powerful mechanism for automating tasks in external tools based on events that occur in CSM.

Use the following Actions to integrate with external tools:

- Run a Program
- Write to a File
- Excel Merge
- Call a Web Service

You can use these Actions with Trusted Agents to perform tasks across different networks or in a Cherwell SaaS environment.

Effort level: This method can be simple or complex depending on the One-Step Action you create. For most Actions, you do not need programming experience.

Trigger CSM Actions from an External Tool

Use one of these two methods for triggering actions in CSM based on events that occur in an external tool:

- **Webhooks**: Use HTTP POST methods to send data to a CSM webhook endpoint. Assign a One-Step Action 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 CSM, which fires a One-Step Action to update mapped fields in the Incident.

  For more information, see About Webhooks.

  Effort level: This method can be simple or complex depending on the requirements of the external tool and the One-Step Action you create. Some programming experience may be required.

- **Cherwell® REST API**
  The Cherwell REST API provides programmatic access to many CSM functions, such as finding, creating, and updating Business Objects, finding and running Search queries, and running existing One-Step Actions.

  The Cherwell REST API is more powerful and performs faster than other integration options, but is more complex and requires programming experience.

  For more information, see About Cherwell REST APIs.

Effort level: This is the most complex integration option because programming experience is required. If you do not have this experience, consider using one of the alternative methods described in this topic.

Related concepts

Import Data from External Databases

About Webhooks in CSM

About Cherwell REST APIs

Related tasks

Import Business Object Data with .csv Files

CSM User Role Scenario

Documentation for CSM is divided into relevant user roles: administrator, user, and developer. Add user role constraints to your documentation searches by selecting the Filters button and the desired user role radio button prior to running a search.

The CSM documentation user roles are:

- **Administrator**: Content for users that create or edit forms, dashboards, One-Step™ Actions, Automation Processes, or security rights in CSM Administrator. Administrators may also perform system functions, such as upgrades and performance optimizations.

- **User**: Content related to fulfilling service requests, tracking change requests, or using the CSM Desktop Client or CSM Browser Client.

> **Note:** Throughout the documentation, the term "customer" is used in reference to a CSM Portal user.

- **Developer:** Content related to the Cherwell® REST API, SAML authentication, and creating mApp Solutions.

The following table shows how example users could translate their job responsibilities into user roles to easily and quickly find relevant documentation.

Example User	Documentation Role Filter
Andrew, a system administrator, can view, create, edit, or run all CSM Objects. He can also assign security rights to other users and utilize all CSM Administrator functionality, such as setting up database connections, Email Monitoring, server farms, and Globalization.	Administrator
Tracy uses the CSM Portal to log incidents and requests for a service or Configuration Item. Tracy does not have access to the CSM Administrator, CSM Desktop Client, or CSM Browser Client	User
Dave is a system administrator with the same responsibilities as Andrew, but he also creates mApp Solutions that expand system functionality. Dave also uses the Cherwell REST API Discovery Tool to configure REST API operations on Business Objects.	Developer
Gina, a service desk manager, uses the CSM Desktop Client or CSM Browser Client to resolve or approve incidents and monitor her team's progress with dashboards, widgets, and reports. Gina's team has similar responsibilities, but fewer security rights than Gina. Gina and her team all consume a CSM license.	User(s)

Quick Starts

Quick starts provide access to most commonly used features. Links to related documents are provided in each quick start.

Tours • Tour the Desktop Client • Tour the Browser Client • About Customer Portals • About Searching • Tour the Report Suite • About Email	**Record Management** • Service Catalog, including Configuration Steps • Log a Normal Change • Log an Incident • Log a Problem • Log a Knowledge Article
Configuration • Create a Portal • Create a Theme • Create a Dashboard • Create a One-Step Action • About Globalization • Add an Approval to a Business Object	**Installation** • About Installing • Configure CSM Connections • Configure Auto-Deploy • Upgrading CSM