CSM 2022.3 Client Suite

Legal Notices

The Cherwell Software product suite includes:

- Cherwell Service Management
- Cherwell Asset Management

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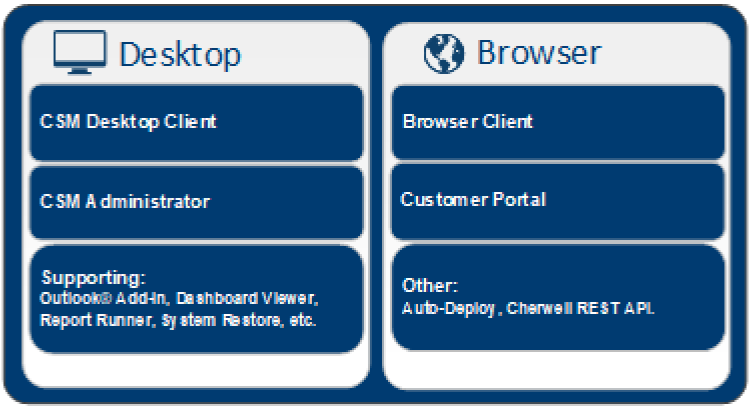
Contents

Client Suite

CSM provides multiple clients to access the system.



CSM Desktop Client

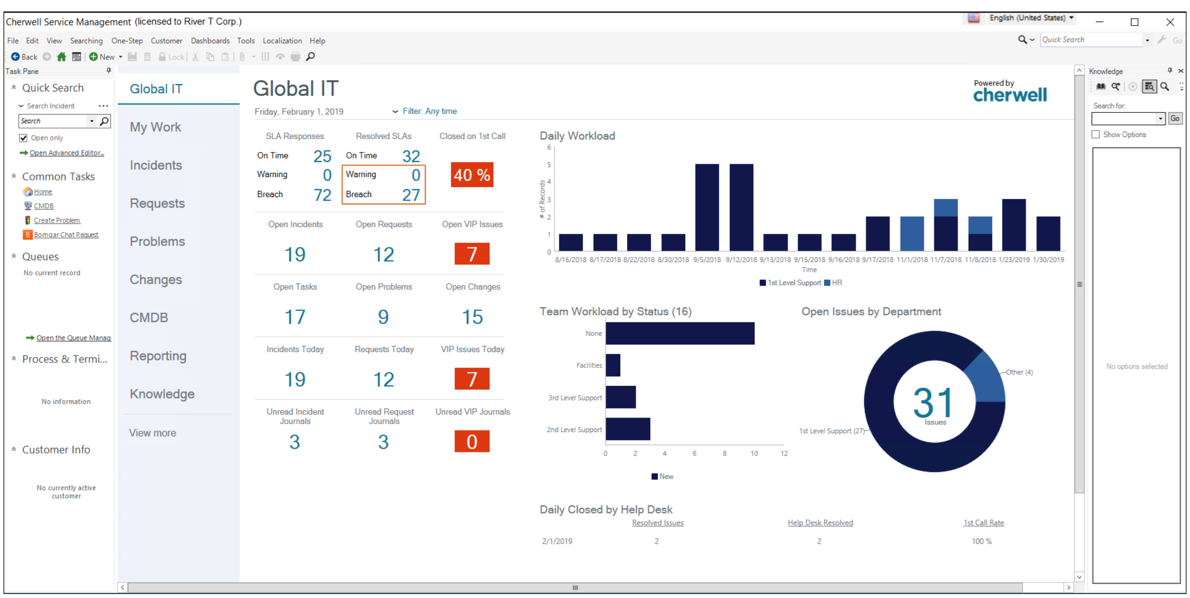
The CSM Desktop Client is the Windows-based user application for CSM.

CSM Desktop Client

The Desktop Client runs under Microsoft® Windows®, and provides all the features and default Business Objects/processes for users who need to respond to and act on requests.

Desktop Client features include:

- **Record Logging:** Log and manage records (example: Incident, Problem, Change, Customer, CMDB, etc.).
- **Dashboards** and **Widgets:** Use dashboards to view critical metrics, analyze and predict trends, drill-down into data, execute Actions, or display information that might be relevant to a group of users or customers.
- **One-Step Actions:** Run One-Step Actions to initiate one or more defined Actions, automating common or repetitive tasks.
- **Searching:** Run Quick Searches or Saved Searches to efficiently and thoroughly search/filter your CSM data, locating one record or a set of records.
- **Customer:** Use the Contact Manager to view and manage Customer records.
- **Reporting:** Use a host of powerful reporting tools (defined Reports and report writing tools, Search Groups, Dashboards/Widgets, and Visualizations) to gather and measure data, analyze metrics, and predict trends.
- **Knowledge:** Search for Knowledge from configured Knowledge Sources (example: Knowledge Articles, records, attachments, web, etc.).
- **Additional Features:** Approvals, Attachments, Calendars, E-mail, Journals, Tasks, Queues, Settings, Visualization, etc.



Related concepts

Tour the CSM Desktop Client

Personalize the Desktop Client User Interface

Related tasks

Log in to the CSM Desktop Client or CSM Administrator

Log in to the CSM Desktop Client or CSM Administrator

Log in to the CSM Desktop Client or CSM Administrator from the machine on which these Windows-based clients are installed.

To log in to the Windows-based clients:

1. Double-click the **Cherwell Service Management** icon or **CSM Administrator** icon on the desktop, or select **Start>All Programs>Cherwell Service Management** or **Cherwell Administrator**.

   Note: If the **Automatically Use Connection Without Asking** check box was previously selected or if the system administrator already set up a permanent database connection, the database connection window will not open.

2. Select the **All Users** tab to view database connections available to all users or the **User** tab to view database connections available to only to the user logging in.
3. Select a database connection. Typically, you connect using an Application Server (3-tier connection), identified by the Application Server icon .
4. Select the **Automatically Use Connection Without Asking** check box to automatically use this database connection each time CSM is launched.
5. Provide your CSM login information:
   - **User ID**: Provide your CSM login ID. This could be domain name/network user name or just a username).
   - **Password**: Provide your CSM password. Passwords are case-sensitive.
6. Select **OK**.
   If you are assigned to more than one CSM role and have not previously selected the **Automatically Use Selected Role** check box, the **Choose Role** window opens.
7. Select the appropriate login role for the session.
8. Select the **Always Use Selected Role** check box to automatically use the selected role at the next log in.

Related concepts

Connections

About Roles

Tour the CSM Desktop Client

The CSM Desktop Client is personal, dynamic, and highly configurable. Each user has a personal interface that is controlled by login role, security rights, and personal settings.

For example:

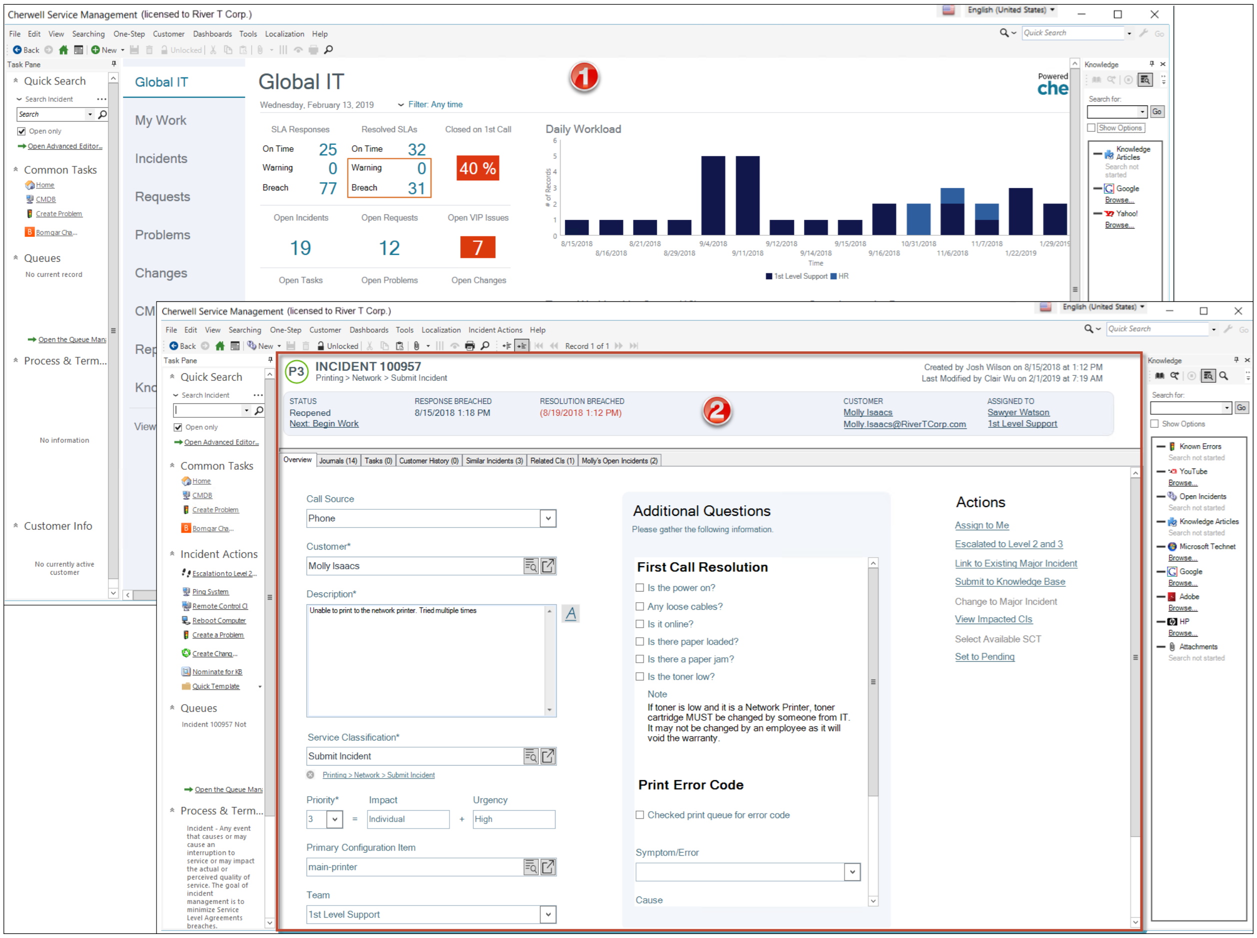
- Your default dashboard (displayed in the Main Pane when you log in or select the **Home** button) might display real-time Incidents, Twitter Feeds, or metrics for your team.
- Your default calendar (displayed when you select the **Calendar** button) might display your active Tasks.
- Your Task Pane might display your queues or your common operations, such as reports or One-Step™ Actions.

The toolbars and panes are dynamic, so they change to accommodate active content. Toolbars and panes are also configurable, collapsible, and dockable so that you can display what you want and put it where you need it.

CSM provides a default Desktop Client interface; however, a system administrator typically tailors this to meet your organization's requirements. For example, a system administrator can configure what to display in the Task Pane, Knowledge Pane, Search Control, etc. With security rights, you can also personalize the interface to meet your needs.

The following figure shows two sample main windows:

1. A sample dashboard in the Main Pane.
2. A sample Incident record, along with its arrangement, in the Main Pane. Notice that the Task Pane and Knowledge Pane can be collapsed to allow more area. Also, notice that the Task Pane and CSM Desktop Client toolbar change to display information and buttons specific to the active record.



Related concepts

[Personalize the Desktop Client User Interface]

[CSM Desktop Client]

Related tasks

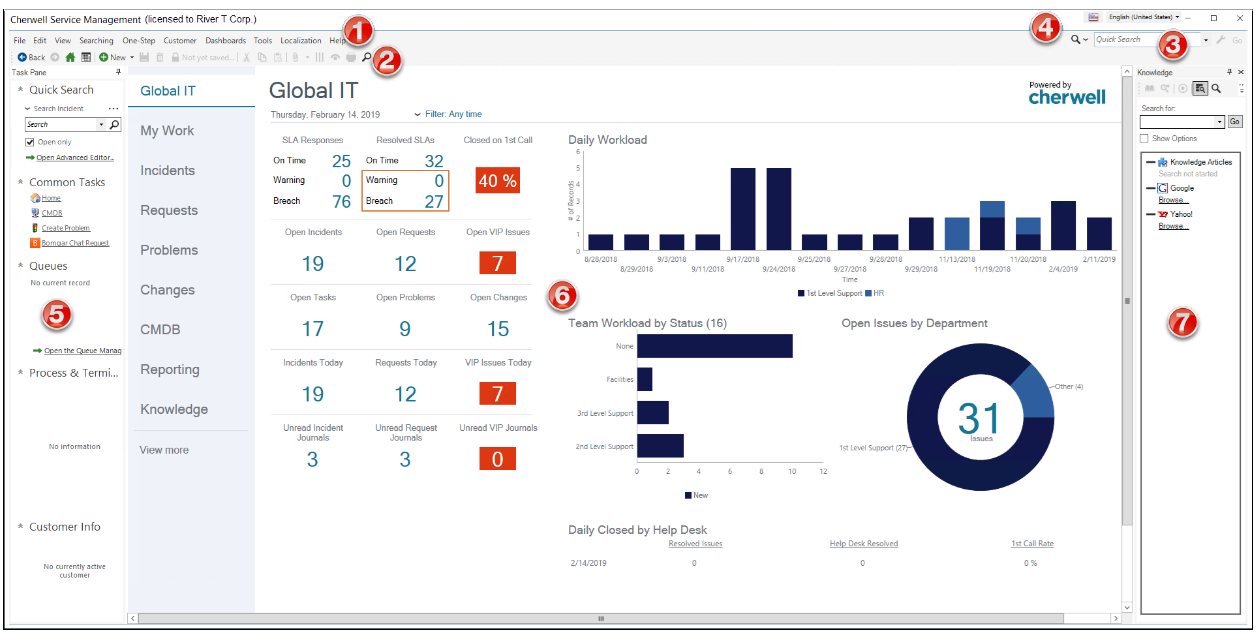
[Log in to the CSM Desktop Client or CSM Administrator]

CSM Desktop Client Main Window

The CSM Desktop Client Main window is configurable and puts information at your fingertips. You decide what to display and where to put it.

By default, the main window contains the following:

1. **Menu bar**: Dynamic row of drop-down menus that are used for common operations.
2. **Toolbars**: Dynamic row of buttons that are used for common operations.
3. **Search Control**: Search box to find specific words or phrases.
4. **Culture Selector**: Switch cultures to change the language for platform and content strings.
5. **Task Pane**: Highly configurable and dynamic tool used to quickly access operations.
6. **Main Pane**: Primary interface that displays the records, forms, and dashboards that you are working on.
7. **Knowledge Pane**: Highly configurable and dynamic tool used to quickly access Knowledge Sources in your Knowledge Base.



Related concepts

[Tour the CSM Desktop Client]

[Personalize the Desktop Client User Interface]

[CSM Desktop Client]

CSM Desktop Client Menu Bar

Use the CSM Desktop Client menu bar to access common CSM operations.

The CSM Desktop Client menu bar is located at the top of the main window.

The **Actions** menu option is displayed only if it is configured in CSM Administrator.

File Menu

Action	Description
New	Creates a new record (example: Incident).
Save	Saves the active record.
Abandon	Abandons changes to the active record.
Delete	Deletes the active record.
Print	Prints the active pane.
Print Grid	Prints the active grid.
Export Grid	Exports the active grid to the following formats: • .csv • .html • .txt • .rtf • .xml
Send E-mail	Creates an email to send.
E-mail Current Customer	Creates an email to send to the active customer.
New Window	Launches a new CSM window.
Logout	Logs you out of the CSM Desktop Client.
Close	Closes the CSM Desktop Client.

Edit Menu

Action	Description
Undo	Cancels the last operation.
Redo	Repeats the last operation.
Cut	Moves the selected item to the clipboard, where you can paste the item into a new location.

Action	Description
Copy	Copies the selected item to the clipboard, where you can paste the item to a new location.
Paste	Inserts an item from the clipboard.
Show Legal Values	Displays a list of legal values (for Lookup fields only).
Refresh	Refreshes the active record.
Zoom	Zoom the field into a larger window.
Unlock	Releases the lock (unlocks) the active record.
User Locks	Opens the Record Locking Manager, where you can view and release any/all locked records.

View Menu

Action	Description
Task Pane	Displays/hides the Task pane. For more information, see CSM Desktop Client Task Pane.
Knowledge	Displays/hides the Knowledge pane. For more information, see CSM Desktop Client Knowledge Pane.
Navigation (window)	Displays the default dashboard and navigates back/forward through the session history.
Record (Navigation)	Navigates through the current record set.

Searching Menu

Action	Description
Search Manager	Opens the Search Manager, where you can run and manage saved searches.
Quick Search Builder	Opens the **Quick Search** window, where you can build a quick search.
Edit Current Search	Opens the **Edit Search** window, where you can change the parameters of the active search.
Save Current Search As	Saves the active search as a saved search that you can use again later.
MRU list	Lists the MRU (Most Recently Used) items. For more information, see Configure User General Settings.

Action	Description
Install PowerBI Data Connector	Installs the Power BI Data Connector to use with third-party reporting tools. For more information, see Using Search Data with Third-Party Reporting Tools.

Note: If a Business Object has been previously applied to your system as part of a Protected mApp™ Solution:

- You see a shield icon next to each content-protected search.
- You can't edit or delete a content-protected search.
- See Protected mApp Solutions.

One-Step™ Action Menu

Action	Description
One-Step Action Manager	Opens the One-Step Manager, where you can run and manage One-Step Actions.
One-Step Action Blocks	Opens the Action Block Manager.
MRU list	Lists the most recently used (MRU) One-Step Actions.

Customer Menu

Action	Description
Contact Manager	Opens the Contact Manager, where you can view and manage customer records.
Current Info	Displays the current customer's information.
Config Items	Displays the current customer's configuration Items. For more information, see About the Configuration Management Database (CMDB).

Dashboards Menu

Action	Description
Dashboard Manager	Opens the Dashboard Manager, where you can view and manage dashboards.
Edit <current Dashboard>	Opens the Dashboard Editor, where you can edit the current dashboard. For more information, see Dashboard Editor.

Action	Description
Set <current Dashboard> as default	Changes the current dashboard to be the user default.
Focus on Dashboard	Sets focus on the current dashboard view.
Widget Manager	Opens the Widget Manager, where you can manage widgets.
Metric Manager	Opens the Metric Manager, where you can manage metrics.
Color Palette Manager	Opens the Color Palette Manager, where you can manage color palettes.
Heads-up Display	Opens the Heads-Up Display (HUD) in a new window. For more information, see Heads-Up Display (HUD).
MRU list	Lists the most recently used (MRU) Dashboards.

Tools Menu

Action	Description
CMDB	Opens the CMDB Interface, where you can manage Configuration Items (CIs). For more information, see CMDB Interface.
Queues	Opens the Queue Manager, where you can manage queues.
Knowledge	Opens the Knowledge Pane, where you can search configured knowledge sources. For more information, see CSM Desktop Client Knowledge Pane.
Reports	Opens the Report Manager, where you can run and manage reports.
Calendars	Displays the default (Main) calendar. Also displays an option to open the Calendar Manager, where you can view and manage calendars.
Visualizations	Displays the default Visualization. Also displays an option to open the Visualization Manager, where you can view and manage visualizations.
Attachments	Opens the Attachment Manager, where you can view and manage attachments.
Current Record Automation Processes	Displays Automation Processes for the current record. For more information, see View Automation Processes for a Single Record.
Table Management	Opens the Table Management interface, where you can manage Lookup Table values. For more information, see Table Management Interface.
Options	Opens the **Options** window, where you can configure personal settings (example: general, display, task pane/search control, dashboard/HUD/calendar, user information, and email). For more information, see Configure User Settings.

Action	Description
Network Health Check	Runs the Network Health Check, which tests to validate network speed and connectivity. For more information, see Network Health Check.

Actions Menu

If configured, an additional **Actions** menu is available when a record is displayed in the Main Pane (example: The **Incident Actions** menu item displays when an Incident is active). The actions are defined as part of the Business Object definition in CSM Administrator.

Action	Description
Quick Templates	Displays a list of available quick templates (example: Reset Password).

Localization Menu

Action	Description
Culture Quick Swap (CTRL+W)	Switch between the preferred culture and the last selected culture.
Preferred Culture (CTRL+D)	Switch to the preferred culture.
Previous Culture (CTRL+L)	Switch to the last culture you selected.

Help Menu

Action	Description
Contents	Opens the online help.
Reload Definitions	Reloads all definitions.
Current Field Information	Displays properties for the active field (example: Name, type, description, search properties, required or not, validation, and field ID).
Report Error	Opens the **Report Error** window so you can report an error to Cherwell.
System Analyzer	Opens the System Analyzer, where you can track behind-the-scenes operations in a live environment directly from the CSM Desktop Client.
About	Displays information about CSM (version, copyright, licensing details, and contact information).

Related concepts

Tour the CSM Desktop Client

CSM Desktop Client

CSM Desktop Client Quick Search Widget

CSM Desktop Client Quick Search Widget

Use the CSM Desktop Client Quick Search Widget to search records for all Business Objects or records for a specific Business Object. The CSM Desktop Client Quick Search Widget is located in the top-right corner of the window.

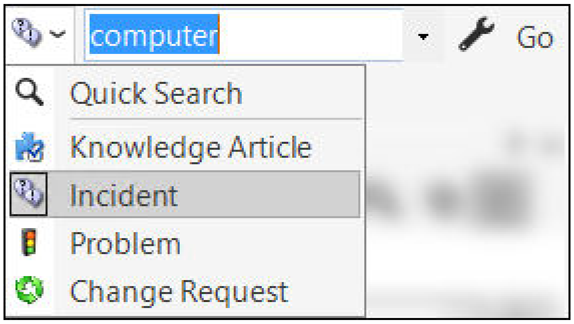


Table 1. CSM Desktop Client Quick Search Widget Options

Action	Description
Choose Items to Search (drop-down list)	Drops down so that you can select **Quick Search** or a specific Business Object to search: • **Quick Search**: Searches *all records* that contain a specific word or phrase. • **Specific Business Object Search**: Only searches records for the selected Business Object (Example: Incident). See Quick Search and Quick Search Good to Know for more information. See Configuring Search Defaults for specific information on enabling/disabling Business Objects for search.
Quick Search (text field)	Type or select the search word or phrase. The most recently used searches appear in a drop-down list.
Go (magnifying glass icon)	Runs the search. Search results are displayed in a grid (if they are of the same type) or a list (if they are of different types). By default, the search results display according to their **Relevancy** ranking, which means the records most likely to be relevant to your search string display at the top of the results. See Quick Search Results for more information.
Search Options (wrench icon)	When searching a specific Business Object, select the wrench icon to define options to refine the search: Changed, Open records only, Relationships, Attachments, Sort By, etc.
Changed	Limits the search to records that have changed during a specific timeframe.

Action	Description
Open (records) only	Limits the search to records that have not reached their final state (example: not closed). If the Business Object does not have a "final" or closed state, this option does not appear. **Note:** The lifecycle and terminology vary depending on the Business Object and scenario (examples: **Unapproved Changes only** might appear when searching Changes, **Non-Retired only** might appear when searching Knowledge Articles).
Relationships	Includes related Business Objects in the search (example: If the search word appears in a Journal entry, the Incident to which it is attached will be included in the search results).
Attachments	When selected, the search returns results that match the text within .txt, .doc, and .xls files and will return any file type with a matching file name.
Sort by	Selects the Business Object field (column) to use to sort the search results. By default, the search results display according to their **Relevancy** ranking, which means the records most likely to be relevant to your search string display at the top of the results. See Quick Search Results for additional information.
Descending Sort Order	Sorts the results in descending order instead of ascending order.
Search Manager	Opens the Search Manager where you can create a Saved Search.
Close	Closes the Search options drop-down box.

Related concepts

About Quick Search

Quick Search Results

CSM Desktop Client Toolbar

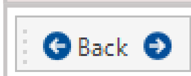
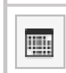
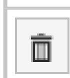
Use the CSM Desktop Client toolbar to quickly access common CSM operations. By default, all toolbars are located under the menu bar in the main window; however, you can independently display/hide and move/dock each toolbar so that you can display them when and where you want.

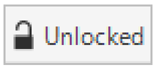
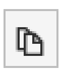
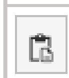
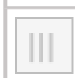
Buttons are dynamic. For example, the **Lock** button appears only when a record is displayed in the Main window; the **Save** button is disabled until CSM detects that there is content to save.

The toolbar is made up of several smaller toolbars:

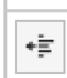
- **Main toolbar:** Displays buttons for performing common CSM operations.
- **Navigation toolbar:** Displays buttons for navigating between records (example: Incident, Problem, etc.).
- **Action toolbars:** Display buttons specific to the type of record displayed in the Main Pane (example: The Incident toolbar displays when an Incident is active). These toolbars are created as part of the Business Object definition in CSM Administrator.
- **User toolbars:** Display personal toolbars that users create.
- **Arrangement/Relationship toolbars:** Display buttons for working with form arrangement records (child records in a relationship with a parent record).

Main Toolbar

Button	Action	Description
	**Back/Forward**	Navigates backward or forward in the content pane sequence.
	**Home**	Displays the CSM Home page with the default dashboard active.
	**Calendar**	Displays the default calendar.
	**New**	Displays item options (you choose the type). The icon on the button indicates the type of record.
	**Save**	Saves changes in the active window.
	**Abandon**	Abandons changes to the current item.

Button	Action	Description
  	**Lock Record** **Unlock Record** **Record is locked by another User**	Locks the active record. Unlocks the active record. Record is locked by another user. **Note:** This button toggles depending on the current status of the active record and who has the record locked. This button appears only if record locking is enabled and only when a record is active in the CSM Main Window.
	**Cut**	Moves the selected item to the clipboard, so you can then paste the item into a new location.
	**Copy**	Creates a new item whose properties are the same as the copied item. The new item can then be named and customized.
	**Paste**	Inserts an item from the clipboard to a new location.
	**Attach**	Attaches a file, Web page, image or shortcut. Also, has an option for displaying/hiding the Attachment Bar.
	**Show Legal Values (Lookup)**	Displays a list of legal values (for lookup fields only).
	**Print**	Prints the active pane.
	**Search Manager**	Opens the Search Manager, where you can run and manage Saved Searches.

Navigation Toolbar

Button	Action	Description
	**Show results**	Displays a set of records meeting a specific criteria.

	Show current record	Displays the currently selected record.
	Go to first record	Jumps to the first record in set.
	Go to previous record	Jumps to the previous record in set.
	Go to next record	Jumps to the next record in set.
	Go to last record	Jumps to the last record in the set.

Action Toolbar

The Action toolbars are created as part of a Business Object definition, vary by Record Type (example: Incident is different than Problem), and appear only when a record is open.

Form Arrangement/Relationship Toolbar

The Relationship toolbars are created as part of the form arrangement definition, vary by relationship, and appear only when a child tab is displayed in an arrangement. The following figure shows an example of a Configuration Item (CI) toolbar displayed in an Incident's arrangement.

Button	Action	Description
	Link	Adds/links additional items.
	Unlink	Unlinks the selected item.
	Go To (Quick View)	Goes to the source record.
	Save	Saves changes in the active window.
	Quick View	Opens the item in a second window so you can take a quick look at the details.
	Go to first record	Jumps to the first record in the set.
	Go to previous record	Jumps to the previous record in the set.
	Go to next record	Jumps to the next record in the set.
	Go to last record	Jumps to the last record in the set.

	**Filter**	Filter items in the Grid.
	**Print**	Prints the active Grid.
	**Export**	Export Grid to a file.
View	**View**	Displays items as: • Form • Grid • Split screen (both Form and Grid): horizontal or vertical.

Related concepts

Tour the CSM Desktop Client

CSM Desktop Client

Protected mApp™ Solutions

Protected mApp™ Solution FAQs

CSM Desktop Client Task Pane

The CSM Desktop Client Task Pane is highly configurable and is used to quickly access tasks. The tasks in the Task Pane vary depending on the active item in the Main Pane (example: If an Incident is active, the tasks will be Incident-specific).

By default, the Task Pane is located on the left side of the main window; however, you can display it/hide it, collapse/pin it, and move/dock it so that you can display it when and where you want.

A system administrator initially chooses which items appear by default for each role; however, if you have security rights, you can select which items appear on your own Task Pane.

Table 1. CSM Desktop Client Task Pane Options

	• **Quick Search**: Displays the Quick Search options. • **Common Tasks**: Displays tasks you frequently do. • **Actions**: Displays common actions for the active record. This area changes based on the record (Business Object) you are working with. • **Queues**: Displays the current record and a list of specific grouped records. **Note:** For more information, refer to About Queues. • **Process & Terminology**: Displays helpful text for the active record. • **Customer Info**: Displays a mini customer summary for any active record that allows you to select a customer (example: Incident).

Related concepts

Tour the CSM Desktop Client

Quick Search in the Task Pane

Personalize the Desktop Client User Interface

CSM Desktop Client Main Pane

Use the CSM Desktop Client Main Pane to view data and to perform the majority of your CSM operations. Upon logging in, the Main Pane displays the Home Dashboard.

Depending on the operation, the Main Pane can also display:

- Records: Incidents, Problems, Knowledge Articles.
- Search Results: Quick Search, Knowledge Search, etc.
- Default Calendar.
- Contact Manager.
- Configuration Management Database (CMDB).
- Table Management.

Related concepts

Tour the CSM Desktop Client

Personalize the Desktop Client User Interface

CSM Desktop Client

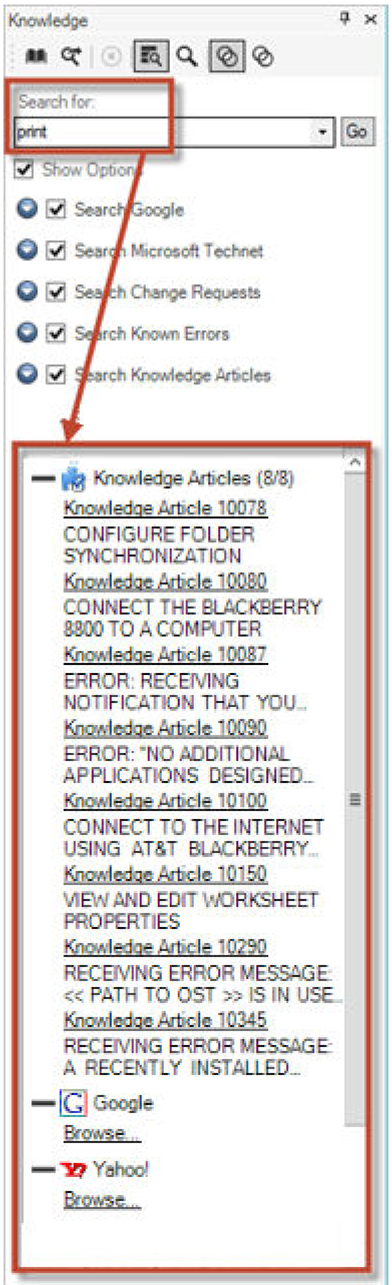
CSM Desktop Client Knowledge Pane

Use the CSM Desktop Client Knowledge Pane to quickly access the Knowledge Sources in your Knowledge Base (example: Knowledge Articles, Business Objects, web, etc.). The available Knowledge Sources vary depending on which Business Object is displayed in the CSM Main Pane.

By default, the Knowledge Pane is located on the right side of the main window; however, you can display/hide it, collapse/pin it, and move/dock it so that you can display it when and where you want.

When you run a Knowledge Search, the results appear at the bottom of the pane. Results display in order of Relevancy ranking. This means the records most likely to be relevant to your search string display at the top of the results by default.

See CSM Desktop Client Knowledge Pane for more information.



Related concepts

Tour the CSM Desktop Client

Personalize the Desktop Client User Interface

CSM Desktop Client

Personalize the Desktop Client User Interface

The CSM Desktop Client interface is highly configurable. If you have been granted security rights, you can configure settings made by your system administrator, as well as display, hide, move, and dock certain elements.

You can:

- Configure dser settings: General, display, task pane/search control, dashboard/HUD/calendar, user information, and email. See Configure User Settings.
- Display/hide a toolbar or pane.
- Pin/collapse a pane.
- Move/dock a pane.
- Move/dock a toolbar.
- Create a personal user toolbar. See Create a User Toolbar.

Configure User Settings

Global and user settings are initially configured in CSM Administrator. Personal settings/defaults can be configured in CSM Desktop Client and control how CSM looks and behaves for each user. Use the **CSM Options** window (**Tools > Options**) to configure user settings.

- **User General settings:** Restore, searching, MRU (Most Recently Used), IME (Input Method Editor), catalog, and logging settings.
- **User Display settings**: Application skin, window titles, and accessability options.
- **User Task Pane and Search settings**: Which default items appear in the Task pane and which search control is used on the CSM menu bar.
- **User Dashboard and Calendar settings**: Personal default dashboard and dashboard theme, Heads-Up Display (HUD), calendar, and mobile dashboard. You can also configure personal web proxies for web requests.
- **User Information settings:** Personal login credentials, authentication, user profile information.
- **User Email settings**: Personal email accounts.
- **Manage Delegates:** Delegates to take over your work when you are unavailable. See Delegate Work.

Configure User General Settings

Use the General page in the Options window User options, such as restoring Grids and Prompts to their default settings, defining the number of MRU (Most Recently Used) Items, and setting logging options.

To configure User General settings:

1. From CSM Desktop Client the menu bar, select **Tools>Options**.
2. Select the **General** page.
3. Select the following options as they apply.

Option	Description
Restore All Dismissed Message Prompts	Select this check box to restore any previously dismissed message prompts so that they appear again.
Restore All Customized Grids to Admin Defaults	Select this check box to restore all customized Grids back to their default definitions.
If Only One Record is Found in a Search, Automatically Go To That Record	Select this check box to be directed straight to the only search result, instead of first viewing the single item in a Grid List.
MRU (Most Recently Used) Items	Use the up and down arrows to increase or decrease the number of CSM Items that display in the item's MRU list (in the CSM Desktop Client menu bar). Ten items display by default.
Use IME Compatible Multi-line Text Controls	Select this check box to allow Input Method Editor (IME) capabilities so that Users can enter characters and symbols (example: Chinese, Japanese, or Korean language symbols) not found on the input device (example: Keyboard).
Definition Catalog	Select an option for storing primary system definitions in a local catalog file. ◦ **Use System Setting**: Select this option to adhere to the Administrator definitions of catalog usage. ◦ **Use a Local Definition Catalog**: Select this option to ensure the usage of a catalog, regardless of Administrator definitions. ◦ **Don't Use a Local Definition Catalog:** Select this option to ensure a catalog is *not* used, regardless of Administrator definitions. This option is only available if your administrator has enabled it.
Configure Logging	Select the **Configure** button to open the Logging options window. See Logging Options.

4. Select **OK**.

Related concepts

Configure Global Catalog Settings

Logging Options

Configure Logging to a Splunk Server

Related tasks

Reset to the System Grid Definition

Configure User Display Settings

You can configure display settings specific to the logged-in user. These user display settings override some global display settings.

To configure user display settings in the CSM Desktop Client select **Tools > Options > Display**.

Application Skin

To control the appearance of the Desktop Client and CSM Administrator, select an application **Skin**. Options are Cherwell Light (default), Cherwell Blue, or Cherwell Dark.

Window Titles

To configure window title settings, select the **Display connection information** check box, then select an option from the drop-down list. The available window title types are:

- **Connection name**: Displays as *<connection name> connection*.
- **Database name**: Displays as *<database name> database*.
- **Environment name**: Displays as *<environment name> environment* (Production, Development, or Test).
- **Connection and database name**: Displays as *<connection name> connection, <database name> database*.
- **Connection and environment name**: Displays as *<connection name>, <environment> name*.
- **Database and environment name**: Displays as *<database name> database*, *<connection name> connection name*.
- **Connection, database, and environment**: Displays as *<connection name> connection, <database name> database, <environment name> environment*.

  If no environment value is selected, the content displays as *Unknown environment*.

Note: To see the setting changes, you must log out and log in again or switch culture. This setting applies to all CSM databases (example: CSM Administrator) on your current computer.

This setting overrides the global setting for window title settings.

Accessibility

By default, forms display with high-contrast colors.

To assists users with accessibility needs, select the **Override Business Object form themes with Windows colors (for high-contrast users)** check box.

Windows colors are used instead of the form's defined theme.

Related concepts

Configure Global Display Settings

Configure User Task Pane and Search Control Settings

Use the Task Pane and Search page in the CSM Options window to configure which default items appear in the Task Pane and which Search Control is used on the menu bar.

To configure User Task Pane and Search Control settings:

1. From the menu bar, select **Tools>Options**.
2. Click the **Task Pane and Search** page.
3. Configure Task Pane settings:
    - View or hide sections.
    - Add new sections.
    - Configure sections (only applicable to new sections).
    - Delete sections (only applicable to new sections).
    - Organize sections.
4. Check or uncheck the corresponding check box to view or hide the following sections in the Task Pane:
    - Quick Search
    - Common Tasks
    - Actions
    - Queues
    - Process and Terminology
    - Customer Information
5. Add items to the Task Pane (if not using the Default Task Pane Setup):
    a. Uncheck Default Task Pane Setup check box.
    b. Click **Add** to open the Task Pane Section window.
    c. Specify a **name** for the Task pane section.
    d. Click **Add** to open the Action Manager.
    e. Select the items you want to appear in the Task Pane (example: Calendars).
6. Customize the CSM Search Control in the menu bar Search Options:
    - Use Default: Use the Default Search Menu Search Widget, which allows Users to run a Quick Search on multiple Business Objects simultaneously (example: Knowledge Article and Change Request). Users can also select a Business Object in the drop-down to search one item at a time (Specific Search).
    - Use Search Widget: Click the **Ellipses** button to open the Widget Manager and select an existing Search Widget or create your own.
    - No Menu Bar Search: Remove the option to search from the menu bar.
7. Select **OK**.

Configure User Dashboard and Calendar Settings

Use the **Dashboards & Calendars** page in the CSM Desktop Client to configure a default home dashboard, heads-up display HUD), and calendar. You can also clear the local metric cache.

To configure user dashboard and calendar settings:

1. From the CSM Desktop Client menu bar, select **Tools>Options**.
2. Select the **Dashboards & Calendars** page.
3. Select a default dashboard:
    - Select the **Use default** option to use the global default Dashboard.
    - Select the **Dashboard** option, and then select the icon to open the **Dashboard Manager** so you can select a different dashboard.
4. Select a default heads-up display:
    - Select the **Use default** option to use the global default HUD.
    - Select the **Heads-up Display** option, and then select the icon to open the **Dashboard Manager** so you can select a different HUD.
5. Select a default calendar:
    - Select the **Use default** option to use the global default calendar.
    - Select the **Calendar** option, and then select the icon to open the **Calendar Manager** so you can select a different calendar.
6. Select the **Customize Mobile Settings** check box to override the default mobile dashboards configured in CSM Administrator.

    Note: The CherwellMobile applications for iOS and Android were deprecated in March 2019 and are no longer available in their respective application stores. CherwellMobile applications that are already installed should continue to work as expected, however.

7. Select the **Allow Web Proxy for RSS, Twitter, and Other Web Requests** check box to allow Web Proxy for RSS, Twitter, and other Web requests.
8. Select **Clear the Local Metric Cache** to clear the metric values stored on your local machine.
9. Select **OK**.

Define Personal User Information

Use the User Information page in the CSM Options window to configure User Login Credentials, Authentication options, and User details.

To configure User Information settings:

1. From the menu bar, select **Tools>Options**.
2. Click the **User Info** page.
3. View or change the information for the current User.
4. Select **OK**.

Configure User Email Settings

Use the E-mail page in the CSM Options window to configure the following user email settings:

- Add a new email account.
- Edit or copy an existing account.
- Delete an account.
- Designate an account as the default account for sending emails from within CSM.
- Find dependencies.

To configure user email settings:

1. From the menu bar, select **Tools > Options**.
2. Select the **E-mail** page.
3. Configure a personal email account or customize a global email account:
    - **Add**: Configure a new personal email account (POP, IMAP, or Exchange).
    - **Edit**: Edit the settings for an existing account.
    - **Delete**: Delete an existing account.
    - **Revert**: Remove your personal settings and revert to the default settings for a global email account.
    - **Copy**: Copy the settings for an existing account, and then edit the settings as necessary.
4. Define email account settings:
    a. Define personal POP or IMAP Account settings.
    b. Define personal Microsoft Exchange Account settings.
5. Spell check email: Select this check box to have CSM spell-check emails before they are sent.
6. Make default account: Makes the selected account the default account for sending emails within CSM.
7. Find dependencies: Displays other CSM Items using the selected email account (example: An E-mail and Event Monitor).
8. Select **OK**.

Note: For more information about email accounts and how to use email in CSM, refer to the E-mail documentation.

Configure Delegates

Using the CSM Desktop Client or CSM Browser Client, hand off some or all of your work to a colleague (delegate) when you are unavailable. For example, you can use a delegate when you are going on vacation or long-term sick leave.

Use the **Manage Delegates** page in the CSM **Options** window to configure the following delegate settings:

- Business Object.
- Choice of delegate(s).
- Start Date and Time.
- End Date and Time.

To configure delegates, see Delegate Work.

Related concepts

About Delegation

About Approvals

Related tasks

Delegate Work

Configure User Cherwell Mobile Settings

Use the Default Mobile Access window (accessed from the Dashboards & Calendars page in the CSM Desktop Client Options window) to configure how Cherwell Mobile looks and behaves on your personal mobile device. You can configure which:

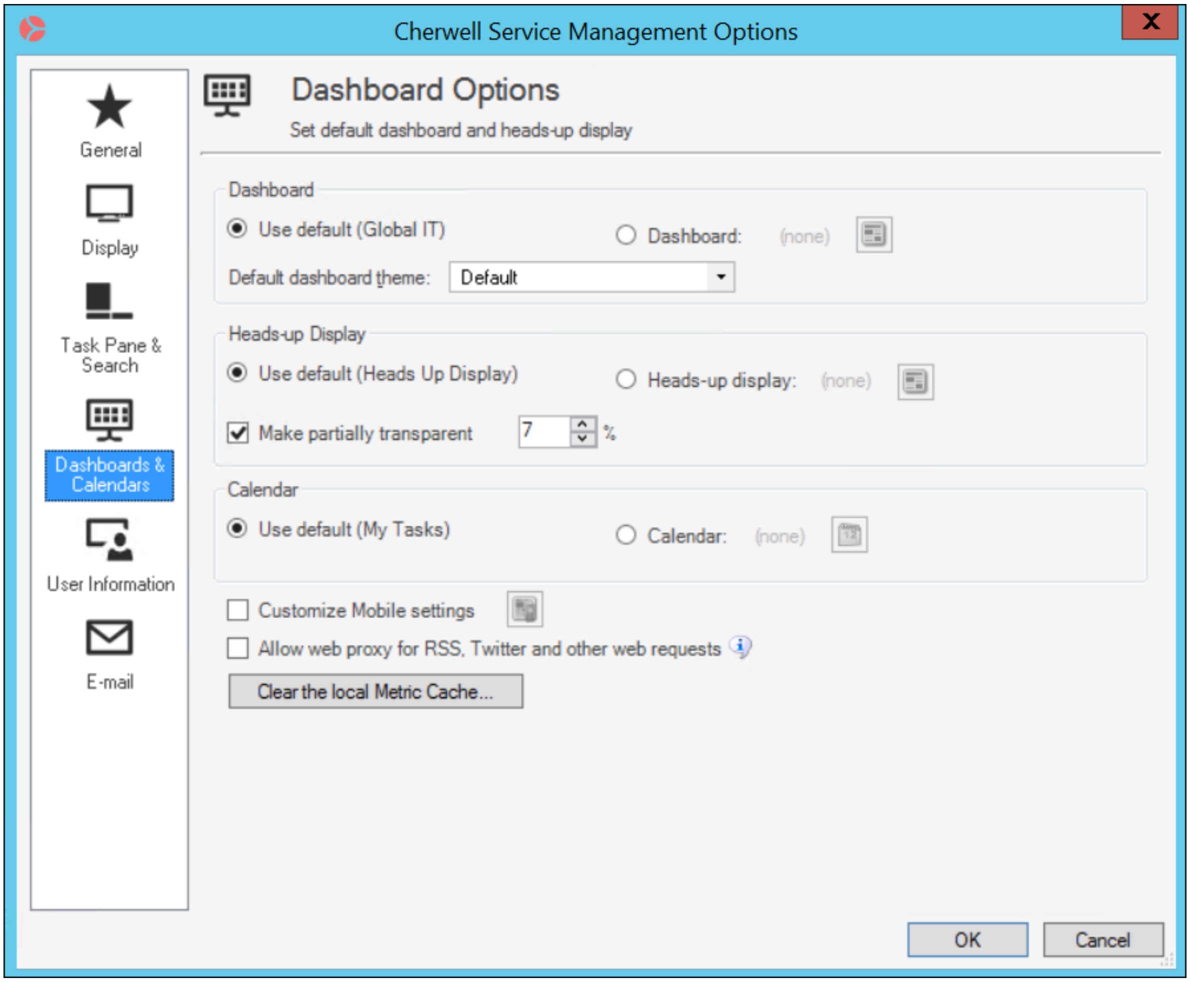
- Mobile Home Dashboard to display by default.
- Mobile Alert Dashboard to display by default.
- Business Objects to make available. Associated Saved Searches will also be available.
- Actions/One-Step Actions to make available for each Business Object.

Good to know:

- The Cherwell Mobile applications for iOS and Android were deprecated in March 2019 and are no longer available in their respective application stores. Cherwell Mobile applications that are already installed should continue to work as expected, however.
- Users must have Cherwell Mobile security rights to configure User Cherwell Mobile settings.

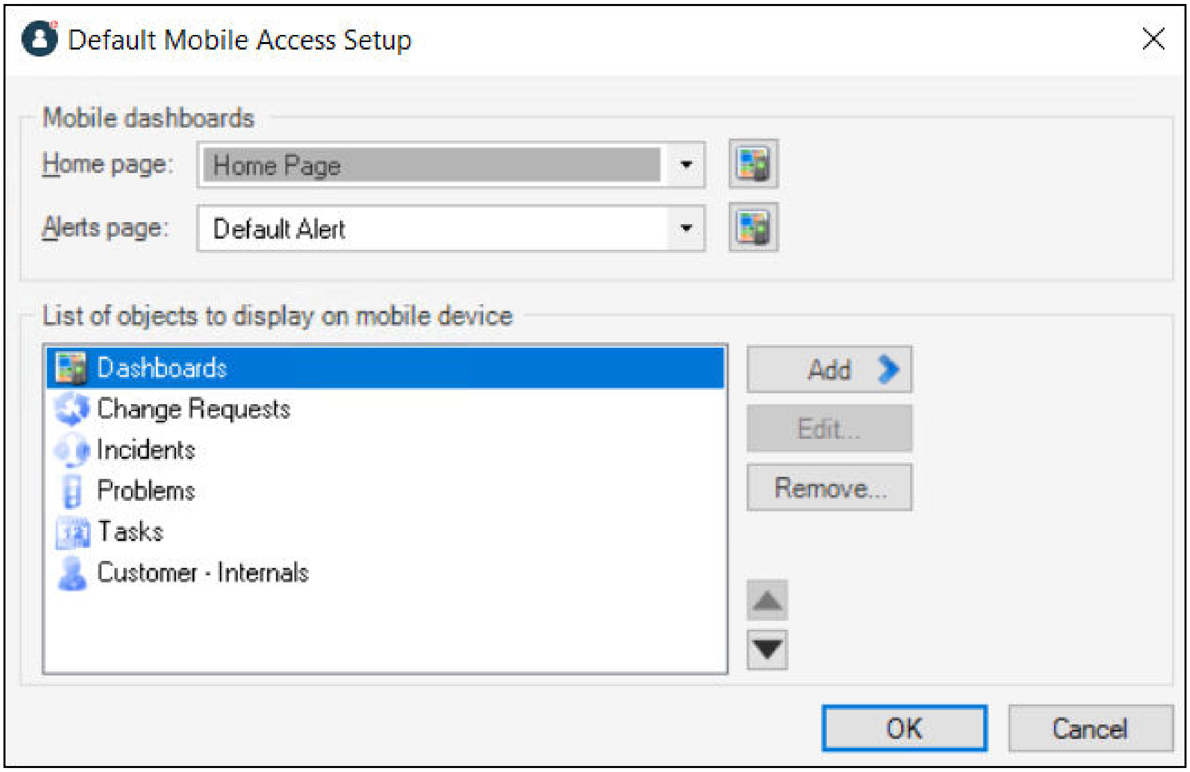
To configure User Cherwell Mobile settings:

1. From the CSM Desktop Client toolbar, click **Tools>Options**.
2. Click the **Dashboards and Calendars** page.



3. Select the **Customize Mobile Settings** check box.

Note: If you do not have rights, this check box does not show up in the window. If you clear this check box, the Cherwell Mobile settings revert to the Global or Role default.



4. Select default Mobile Dashboards (Home and Alert)

   Tip: If you do not want to display any Dashboards, remove the Dashboard item from the *List of Objects to Display on Mobile Device* list.

   a. Home Page: Select a default Mobile Home Dashboard.
      - Click the drop-down to select from a list of recently used Mobile Dashboards.
      - Click the **Mobile Dashboard** button to open the Mobile Dashboard Manager, and then select an existing Mobile Dashboard or create a new Mobile Dashboard.

   b. Alerts Page: Select a default Mobile Alert Dashboard.
      - Click the drop-down to select from a list of recently used Mobile Dashboards
      - Click the **Mobile Dashboard** button to open the Mobile Dashboard Manager,and then select an existing Mobile Alert Dashboard or create a new Mobile Alert Dashboard..

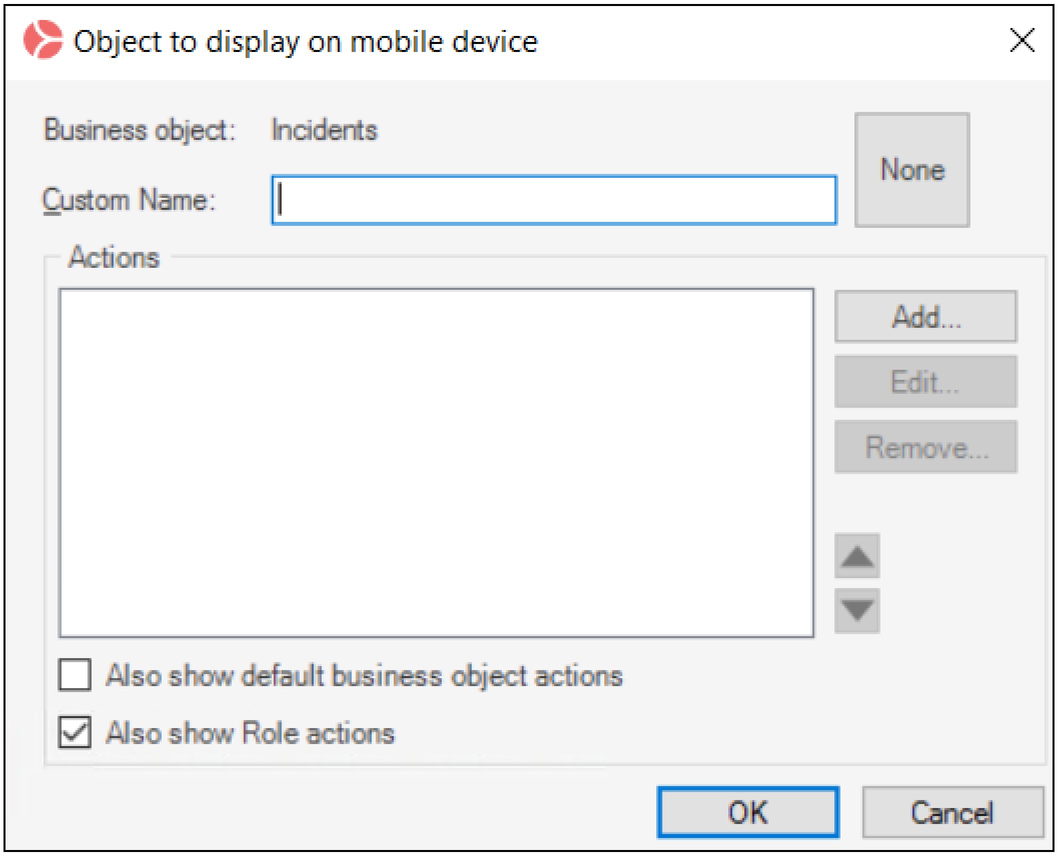
5. Select the Business Objects to make available in Cherwell Mobile:

   Note: In order for a Business Object to be available, it must have the *Show in Search Manager* property set (in the Business Object properties within a Blueprint).

   a. Override List of Objects to Display on Mobile Device: Select this check box to override the current default list of available Business Objects (Global or Role, set in CSM Administrator).

   b. Click **Add**, and then select the **Business Object** to make available on mobile devices.

Tip: Click **Edit** to edit a selected item. Click **Remove** to remove the selected item from the list.



c. Define how to display the Business Object in Cherwell Mobile:
   - Custom Name: Provide a **display name** to use in Cherwell Mobile. If this is left blank, the Business Object name will be displayed.
   - Custom Image:

     Select the image to open the **Image Manager**, and then select an existing image or import a new image to represent the item in the UI.

     If you do not select an image (None), the default image for the Business Object is displayed.

     Android: Android devices use standard color images. For the best results, use the images in the BusObs>32x32 folder in the Image Manager. If you are setting up a mobile configuration for use on both Android™ and iOS® devices, use the iOS-specific images. They are automatically mapped to equivalent standard images for non-iOS® devices.

d. Select the Actions/One-Step Actions to make available in Cherwell Mobile:
   i. Click **Add** to add a new Action/One-Step Action to the list.

Tip: Click **Edit** to edit a selected item. Click **Remove** to remove the selected item from the list. Use the **Up/Down** arrows to change the order of the Actions/One-Step Actions when displayed in Cherwell Mobile (ex: In the Actions list).

ii. Define additional options for the list of Actions.
   - Also Show Default Business Object Actions: Select this check box to make available any default Actions for the Business Object. This option is only available if the Business Object has default Actions available (ex: Approvals have built-in functionality to approve, deny, and abstain).
   - Also Show Role Actions: Select this check box to make available any Actions that were configured for the Business Object as part of the User's default Role settings. If no defaults were configured for the Role, then Global defaults are used.

6. Configure the order of the Actions when displayed in Cherwell Mobile (ex: On the Actions popup list):
   a. Use the **Up/Down arrows** to order the Actions.

Note: You can change the order for all custom Actions/One-Step Actions, but you cannot change the order of the Barcode scan, camera, and Location Awareness Actions/One-Step Actions.

7. Select **OK**.

Display/Hide a Toolbar or Pane

The CSM toolbars and Knowledge Pane can be displayed or hidden.

To display/hide a toolbar or pane:

1. Right-click anywhere on a CSM menu bar, toolbar, or pane.

   A drop-down appears, listing the items that can be displayed/hidden. Currently displayed items have a check next to them.

2. Select an **item** to display it. Clear a checked item to hide it.

Pin/Collapse a Pane

The Task Pane and Knowledge pane can be temporarily viewed, or permanently pinned in the CSM Main window.

To pin/collapse a pane:

- Click the **Pin** button  in the upper right corner of a pane to collapse it. The pane displays as a tab on the left side of the CSM Main window.
- Click the tab to temporarily view a collapsed pane. The pane displays until the cursor is removed from inside the pane.
- Click the horizontal **Pin** icon  to permanently display the pane.

Move/Dock a Pane

The Task Pane and Knowledge Pane can be moved anywhere within the CSM Main window or docked to their default locations.

To move a pane:

1. Click the **banner title** until a Four-Arrow Plus Sign appears.
2. Drag the pane to any location in the CSM Main window. After the pane is removed from the original location, it becomes a small window that can be resized.

   The following image shows the Task Pane moved into the Main Pane.

   Tip: To dock the pane back to its default location, double-click the **banner title**.

Move/Dock a Toolbar

Use the Grab bars on a CSM toolbar to move, dock, and re-dock a toolbar.

To move a toolbar within the menu bar and toolbar area:

1. There are two ways to move a toolbar:
    - Double-click the **Grab bar** on the left side of the toolbar, and then drag the toolbar to a new location within the toolbar area.

      Note: If the toolbar is moved from the toolbar area, it becomes an independent window that can be resized.

    - Click the **Grab bar** until the Four-Arrow Plus Sign appears, and then drag the toolbar to a new location within the toolbar area.

   The following figure shows the Navigation toolbar moved to the line below where it was initially pinned.

2. Let go of the cursor to dock the toolbar.

To move a toolbar outside the menu bar and toolbar area:

1. There are two ways to move a toolbar:
    - Double-click the **Grab bar** on the left side of the toolbar, and then drag the toolbar to a new location in the CSM window.

      Note: If the toolbar is moved from the toolbar area, it becomes an independent window that can be resized.

    - Click the **Grab bar** until the Four-Arrow Plus Sign appears, and then drag the toolbar to a new location within the CSM window.

   The following figure shows the Navigation toolbar moved to the Main pane.

Tip: Double-click the header banner of an undocked toolbar to re-dock the toolbar back to its default location.

Create a User Toolbar

Create one or more personal toolbars (called a User toolbar) to initiate important Actions. For example, create a User toolbar to:

- Run a One-Step Action.
- Run a command (Zoom, Attach, Undo, etc.).
- Display a Dashboard, Calendar, or Visualization.
- Run a Report or Saved Search.

A User toolbar displays with the other CSM toolbars in the CSM Main window.

To create a User toolbar:

1. Right-click anywhere in the CSM toolbar area, and then select **Customize.**

   The toolbars for User window opens.

2. Click the **Add** button.

   The New Toolbar window opens, listing Actions that are applicable for a toolbar.

3. Click the **Add Action** button , and then select the type of **Action** to add to the toolbar (ex: Add Command Action).

   A CSM Item Manager opens (varies by type of Action selected in the previous step) to select/create the CSM Item to initiate through the Action.

4. Select a CSM Item (ex: a specific Dashboard).
5. Define properties for a new Action:
   a. **Action:** Displays the name of the Action as it is recognized by CSM (ex: Name of the Dashboard or Report). It is recommended that you do not change this.

   b. **Display text:** Type the **text** to display on the toolbar button if the "Show text on button check box" (below) is checked.

   c. **Image button:**

      Select the image to open the **Image Manager**, and then select an existing image or import a new image to represent the item in the UI.

   d. **Help text:** Type a **tooltip** to display when the cursor is on the menu item.

   e. **Begin group:** Select this check box to display a horizontal line before the menu item, separating it from other menu items.

   f. **Show text on button:** Select this check box to display the Display Text on the toolbar button.
6. Add additional actions to the toolbar.

7. Select **OK**.

Keyboard Shortcuts

You can use the following keyboard shortcuts when working in the CSM Desktop Client.

Key	Action
F1	Help
F2	Rename current item
F3	Show the legal values for a field
F4	Heads Up Display
F5	Refresh
F6	Displays the current user's information
F7	Displays the current user's configuration items
F8	Zooms the current field (if a large text field)
F10	Select Menu
Ctrl+C	Copy current text to the clipboard
Ctrl+D	Switch to the preferred culture.
Ctrl+K	Paste the text from the current field into Knowledge Search pane
Ctrl+L	Switch to the last culture you selected.
Ctrl+S	Save the current record
Ctrl+T	Toggle between form and list views
Ctrl+V	Paste text from the clipboard
Ctrl+W	Switch between the preferred culture and the last selected culture.
Ctrl+X	Cut current text to the clipboard
Ctrl+Y	Redo last operation that was undone
Ctrl+Z	Undo last operation
Alt+Down arrow key	Open a combo-box Move down in a list of records
Alt+Left arrow key	Move back to previous location
Alt+Right arrow key	Move forward

Key	Action
Alt+F1–F8	Select tab in the current form arrangement
Ctrl+F4	Go to home page
Ctrl+F5	Displays Self-Service settings (Self-Service setup must be configured on your machine and you must be on a customer type that is set up to be exposed via Self-Service)
Ctrl+scroll	Zoom in/out in editors
Ctrl+Shift+E	Email current customer
Ctrl+Shift+F	Displays the grid filter for a selected grid column
Ctrl+Shift+K	Paste the text from the current field into Knowledge Search pane and searches
Shift+drag	Ignore snapping in an editor
Defined in our database, but can be changed by the user:	
Ctrl+Shift+I	New Incident
Shift+Alt+C	Go to Quick Search for customer

CSM Web Applications

CSM includes two web applications: the Browser Client and the CSM Portal.

CSM Browser Client

The Browser Client is a web-based alternative to the CSM Desktop Client. The CSM Browser Client is supported on most major modern browsers on desktop machines and mobile devices.

The configurations and settings for the Browser Client are determined in the CSM Desktop Client and CSM Administrator. Many functions behave differently in the Browser Client than they do in the Desktop Client. To see the differences in functionality between the Browser Client and the Desktop Client, see CSM Client Feature Parities and Differences

Tour the CSM Browser Client

The Browser Client provides access to CSM through a web browser. Each user has a personal interface that is controlled by login Role and security rights. For example, the default dashboard (displayed in the main pane upon log in or by clicking the Home button) might display real-time Incidents, Twitter feeds, or metrics for a team.

Browser Client features include:

- **Record Logging**: Log and manage records (Incident, Problem, Change, Customer, etc.).
- **Searching**: Run Quick Searches or saved searches to efficiently and thoroughly search and filter CSM data. You can locate one record or a set of records.
- **One-Step Actions**: Run One-Step Actions to initiate one or more defined Actions, automating common or repetitive tasks.
- **Email**: Define and send messages to a single recipient or a group of recipients using comprehensive email functionality.
- **Dashboards** and **Widgets**: Use dashboards to view critical metrics, analyze and predict trends, drill down into data, execute Actions, or display a collection of information that might be relevant to a group of users.
- **Reporting**: Use a host of powerful reporting tools (defined Reports and report writing tools, saved searches, dashboards/widgets, and visualizations) to gather and measure data, analyze metrics, and predict trends.
- **Visualizations**: View visualizations to see the relationships between records in a variety of layouts.
- **Calendars**: View calendars to keep track of ongoing or upcoming tasks.
- **Tools**: Access the Contact Manager, Table Management, and CMDB.
- **Additional Features**: Access HTML pages, Knowledge Articles, and queues.

Related concepts

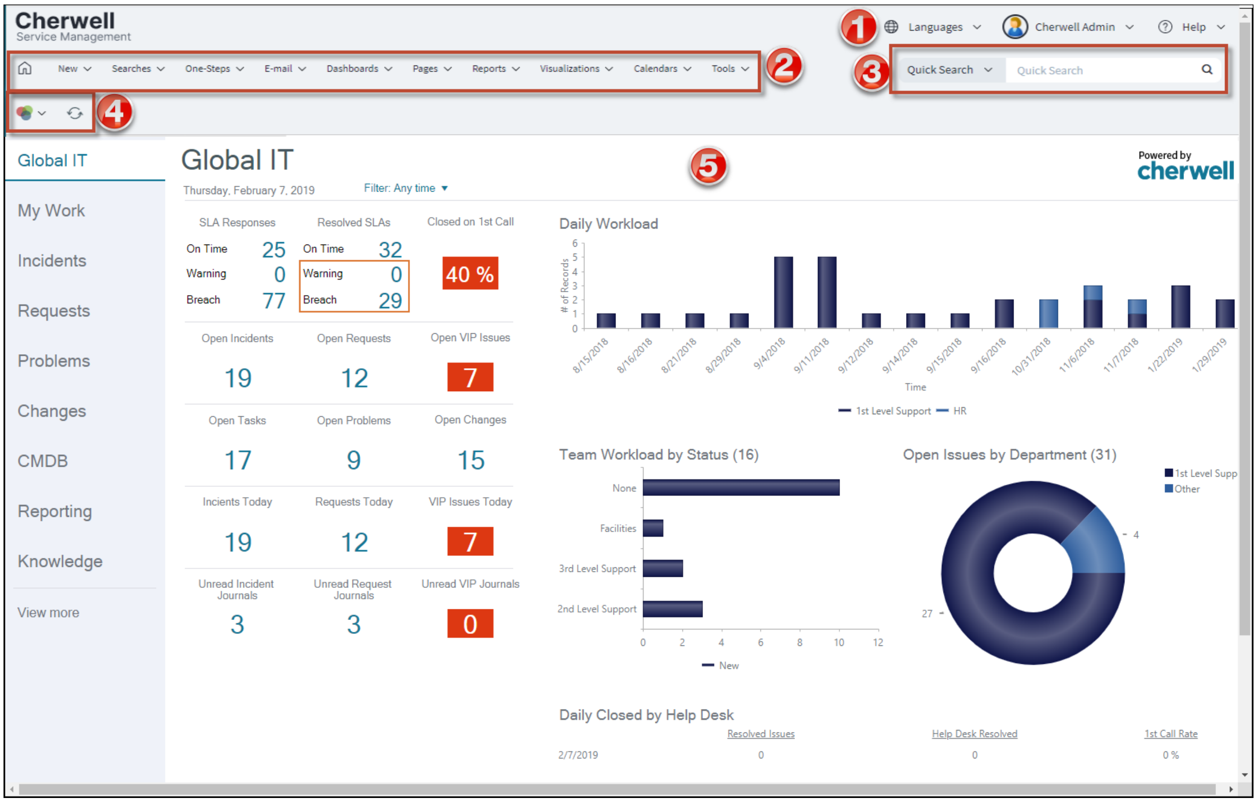
CSM Browser Client

Use the Browser Client

Log in to the Browser Client

Browser Client Main Window

The Browser Client main window is simplified compared to the CSM Desktop Client, but most of the same features are available.



1. **Account Information**: Displays login and user/company information.
2. **Menu bar**: Displays drop-down menus for features and functions within the Browser Client. The menu bar collapses into a hamburger menu on mobile screens and browser windows sized below 768 pixels.
3. **Search Control**: Allows Users to run quick searches and specific record searches.
4. **Toolbar**: Displays available actions and operations within the main pane and within records.
5. **Main pane**: Displays dashboards, records, reports, and search results.

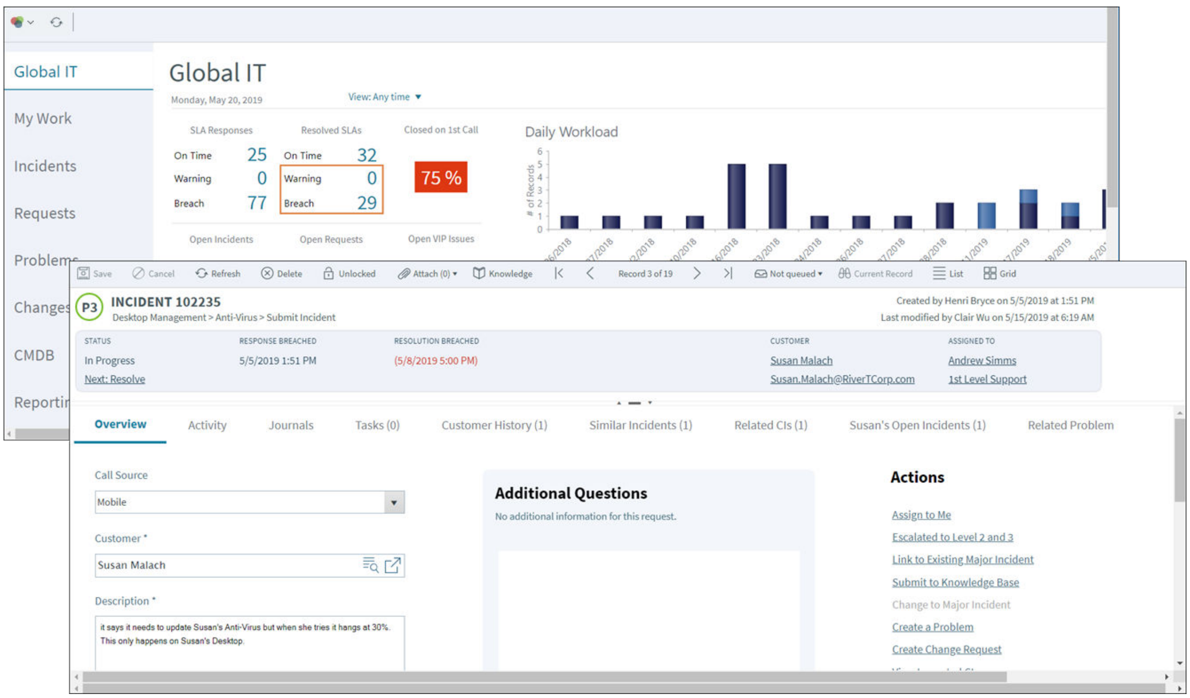
Item Managers are opened from the menu bar. To open a Manager, select a menu (example: **Dashboards**), and then select **[Item] Manager**.

Browser Client Main Pane

The Browser Client main pane is located in the center of the main window and displays content relevant to the current operation. When you log in, the main pane displays the Home Dashboard.

Depending on the operation, the main pane can also display the following:

- Records (Incident, Problem, Knowledge Article, etc.).
- Search results (quick search, Knowledge Article Search, etc.).
- Reports, calendars, visualizations, grids, and more.



Browser Client Quick Search Widget

Use the Browser Client Quick Search Widget to search records for all Business Objects or records for a specific Business Object.

The Browser Client Quick Search Widget is located in the top-right corner of the window.

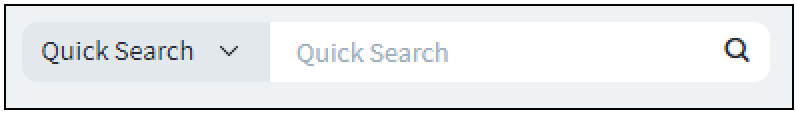


Table 1. Browser Client Quick Search Widget Options

Item	Description
Quick Search (drop-down list)	Select **Quick Search** or a specific Business Object to search: • **Quick Search**: Searches all records that contain a specific word or phrase. • **Specific Business Object Search**: Only searches records for the selected Business Object (example: Incident). See Quick Search and Quick Search Good to Know for more information. See Configuring Search Defaults for specific information on enabling/ disabling Business Objects for search.
Quick Search (text field)	Type or select the search word or phrase. The most recently used searches appear in a drop-down list.
Go (magnifying glass icon)	Run the search. Search results are displayed in a grid (if they are of the same type) or a list (if they are of different types). By default, the search results display according to their Relevancy ranking, which means the records most likely to be relevant to your search string display at the top of the results. See Quick Search Results for more information.
Search Options (wrench icon)	When searching a specific Business Object, select the wrench icon to define options to refine the search: Changed, Open records only, Relationships, Attachments, Sort By, etc.
Changed	Limit the search to records that have changed during a specific time frame.
Open (records) only	Limit the search to records that have not reached their final state (example: not closed). If the Business Object does not have a "final" or closed state, this option is not available. **Note:** The lifecycle and terminology vary depending on the Business Object and scenario (examples: **Unapproved Changes only** might appear when searching Changes, **Non-Retired only** might appear when searching Knowledge Articles).

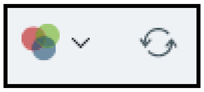
Item	Description
Search Related Items	Include related Business Objects in the search (example: If the search word appears in a Journal entry, the Incident to which it is attached will be included in the search results).
Search Attachments	Return results that match the text within .txt, .doc, and .xls files and will return any file type with a matching file name.
Sort by	Select the Business Object field (column) to use to sort the search results. By default, the Search Results display according to their Relevancy ranking, which means the records most likely to be relevant to your search string display at the top of the results. See Quick Search Results for additional information.
Ascending/Descending	Sort the results in descending order instead of ascending order.
Search Manager	Open the **Search Manager**, where you can create a Saved Search.

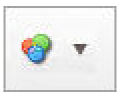
Browser Client Toolbars

Browser Client toolbars are available when you are viewing records or dashboards.

Dashboard Theme Toolbar

The **Dashboard Theme** toolbar allows you to select a dashboard theme and refresh the current dashboard.



Button	Action	Description
	Select a Theme	Applies a new theme to the current dashboard.
	Refresh the Dashboard	Refreshes the current dashboard.

Record Toolbar

The **Record** toolbar provides actions you can perform when viewing records.

Action	Description
Save	Saves changes in the active window.
Cancel	Cancels changes to the current record.
Refresh	Refreshes the data for the current record.
Delete	Deletes the current record.
Legal values	Displays a list of legal values (for lookup fields only).
Unlocked Locked by [user]	The record is unlocked. The record is locked by [user].
Attach	Attach (Import) Files to a Record.
Go to first record	Navigate to the first record.
Go to previous record	Navigate to the previous record.
Go to next record	Navigate to the next record.
Go to last record	Navigate to the last record.

Action	Description
Not queued Add to queue On [queue] Check out Check in Remove from queue	The current record is not in a queue. Add the current record to a queue. The current record is added to [queue]. Check the current record out of the queue. Check the current record back into the queue. Remove the current record from the queue.
Current record	View the current record.
List	View records in a list.
Grid	View records in a grid.

Browser Client Menu Bar

Use the Browser Client menu bar to access CSM features, such as searches, One-Step Actions, and email.

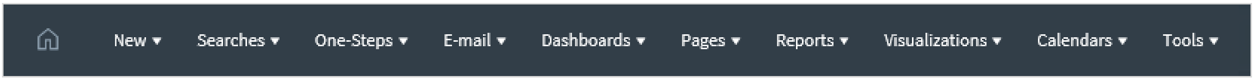


Table 1. Home

Action	Description
Home	Open the default dashboard.

Table 2. New

Action	Description
New	Create a new record (example: New Config - Mobile Device).

Table 3. Searches

Action	Description
Search Manager	Open the **Search Manager**, where you can run saved searches.
Quick Search Builder	Open the **Quick Search Builder**, where you can create a quick search.
Queues	Open the **Queues** menu, including the **Queue Manager** and Most Recently Used (MRU) queues.

Table 4. One-Steps

Action	Description
One-Step Manager	Open the **One-Step Manager**, where you can run One-Step Actions.
Recent Unassociated One-Steps	Run the Most Recently Used (MRU) One-Step Actions.

Table 5. Email

Action	Description
Send Email	Open the **Email Message** window so you can create and send emails. **Note:** An email account must first be set up and given security rights.
Email Current Customer	Open the **Email Message** window to create and send emails to a customer's email address from your current page (example: an Incident record or Problem record). The **To** line is automatically populated with this address, and you are alerted if there is no active customer on the record.

Table 6. Dashboards

Action	Description
Home	Return to the default dashboard.
Dashboard Manager	Open the **Dashboard Manager**, where you can view dashboards.
MRU	See the Most Recently Used (MRU) dashboards.

Table 7. Pages

Action	Description
Pages Manager	Open the **HTML Page Manager**, where you can view HTML pages.
MRU	See the Most Recently Used (MRU) Pages.

Table 8. Reports

Action	Description
Report Manager	Open the **Report Manager**, where you can run reports.
MRU	See the Most Recently Used (MRU) Reports.

Table 9. Visualizations

Action	Description
Visualization Manager	Open the **Visualization Manager**, where you can run visualizations.
Config Visualization	Open the **Configuration Map Visualization**.
MRU	See the Most Recently Used (MRU) visualizations.

Table 10. Calendars

Action	Description
Calendar Manager	Open the **Calendar Manager**, where you can run calendars.
Main Calendar	Open the main calendar, which is configured in CSM Administrator.
MRU	Lists the Most Recently Used (MRU) calendars.

Table 11. Tools

Action	Description
Contact Manager	Open the **Contact Manager**, where you can view and manage customer records.
Table Management	Open the **Table Management** interface, where you can manage Lookup Table values. For more information, see Table Management interface.
CMDB	Open the CMDB interface, where you can manage Configuration Items (CIs).

Action	Description
Network Health Check	If configured, runs the Network Health Check, a test to validate network speed and connectivity. For more information, see Network Health Check.

Related concepts

About Calendars

Contact Manager

CMDB Interface

Related tasks

Send an Email from within CSM

Browser Client Account Information

Use the Browser Client account information options to change your language, open a new browser window, log out, and access online help.

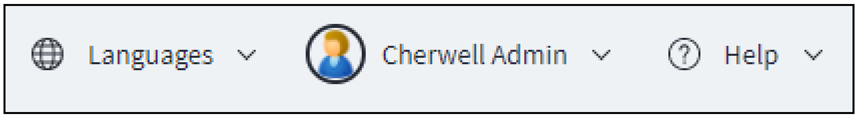


Table 1. User Information

Action	Description
Languages	Switch cultures to change the language for platform and content strings.
New Browser Window	Open the page in a new browser window.
My Profile	View your personal information (contact information, manager information, etc.).
Logout	Log out of the current session.

Table 2. Help Icon / Company Information

Action	Description
Help Icon	Access https://help.cherwell.com or a help site configured by your organization.. For information on configuring a help site, see Configure Global Help Settings.
Report Error	Submit information about an error you receive while working in CSM to Cherwell. An administrator can configure a custom email address in Global System Settings (**CSM Administrator > Settings > Edit System Settings > Help Settings**).
(719) 386-7000	Cherwell phone number. An administrator can configure a custom phone number in Global System Settings (**CSM Administrator > Settings > Edit System Settings > Help Settings**).
<Version Number>	See the version of CSM.
<Environment Type> Environment	See the current system environment (Development, Production, or Test). If an environment is not selected, the text does not display.
Cherwell Copyright	CSM copyright information.

Browser Client Managers

Browser Client Managers use tabs to navigate the areas where CSM items are located within each Manager. The tabs correspond to folders in the Desktop Client and contain the same CSM items.

Select a tab to go to the items located in that file. Select an Item's Home takes you to the base file structure (example: Dashboards>Pinboard, User, Role, Team, Global).

In the Browser Client Managers, you can:

- **Run/Display**: Run or display the selected item (example: Run a saved search, One-Step™ Action, or report; display a dashboard).
- **Filter (Association or Status)**: Filters items by record type (Incident, Problem, Change, etc.) or status for the **Queue Manager**.

  Note: Filtering by record type is only available in the Search, One-Step Action, Dashboard, and Report Managers.

- **View**: View a list of available items in either list view or icon view.
- **Search**: Searchethe Item Manager for the provided word or phrase. Use the drop-down list for recent searches. Clear the search by clicking on any tab under the Item's Home.

CSM Client Feature Parities and Differences

The main Business Objects available in the CSM Desktop Client are also available in the CSM Browser Client. The majority of the differences in functionality are in configuration and administrative functions within the Browser Client.

Features	CSM Desktop Client	CSM Browser Client	Differences
Actions	Yes	Partial	In CSM Browser Client, run only.
Attachments	Yes	Extended	In CSM Browser Client, users can download multiple attachments at once and use drag-and-drop to add attachments to records. The Attachments tab of the Related Items pane is only available in the Browser Client.
Attachment Manager	Yes	No	The Attachment Manager is not currently supported in the CSM Browser Client.
Automation Processes	Yes	Partial	Run based on conditions met in any client. Ability to view Automation Processes for a current record available in CSM Desktop Client.
Business Hours	Yes	Partial	In CSM Browser Client, view only.
Business Object records	Yes	Yes	View, create, edit, and delete Business Object records.
Calendars	Yes	Partial	In CSM Browser Client, view only; in separate tab (not **Tools**).
CMDB	Yes	Yes	
Contact Manager	Yes	Partial	In CSM Browser Client, view and export only.
Execute a Command Actions in One-Step™ Actions	Yes	Partial	In CSM Browser Client, some Execute a Command Actions do not work.
Counters	Yes	Partial	In CSM Browser Client, view only.
Dashboards	Yes	Partial	In CSM Browser Client, view only. Users can change a dashboard theme and refresh dashboards so widgets display the latest data.

Features	CSM Desktop Client	CSM Browser Client	Differences
Email	Yes	Yes	In CSM Browser Client, see Related Items Email, send email, and with attachments. Configuration must be done in CSM Administrator.
Expressions	Yes	Partial	In CSM Browser Client, view only.
Forms	Yes	Yes	
Grids	Yes	Yes	In CSM Browser Client: • Actions, columns, and export functions are found in the toolbar instead of context menus. • Grids automatically collapse to a vertical card view on smaller screens or resized browsers. Filters and sorting are not available in this view. • The **Truncate long fields** option is not available when exporting a grid. • Grid filters do not persist from session to session.
HTML Pages	Yes	Partial	In CSM Browser Client, view only.
Journals	Yes	Yes	
Knowledge	Yes	Yes	
Metrics	Yes	Partial	In CSM Browser Client, view only. Caching differences: • CSM Browser Client: Metric query results are cached on the server. • Desktop Client: Metric query results are cached on each user's local machine. To learn how this impacts results, see Metric Caching.
One-Step Actions	Yes	Partial	In CSM Browser Client, run only. When a One-Step Action executes in the CSM Browser Client, a progress bar is not displayed.
Prompts	Yes	Partial	In CSM Browser Client, run only.

Features	CSM Desktop Client	CSM Browser Client	Differences
Queues	Yes	Partial	In CSM Browser Client, view only; **Queue Manager** in **Searches** (not **Tools**).
Record Locking	Yes	Yes	
Related Items	• Chat • Communication	• Attachments • Chat • Communication • Solution Search	• In CSM Desktop Client, Chat and Communication only. • When you add a new record to a Business Object where the Related Item Navigation has a custom label expression for an aggregate count of related records on a tab or related item, the count value is updated to reflect the number of records found in that relationship query. In the CSM Portal and Browser Client, the count value is correct, but the records themselves do not appear in the **Related Items** pane. Once you save the record, the **Related Items** pane displays the records as expected.
Reports	Yes	Partial	In CSM Browser Client, run only; in separate tab (not **Tools**).
Rich Text	Yes	Yes	
Searching	Yes	Yes	
System Analyzer	Yes	No	In CSM Browser Client, not currently supported.
Table Management	Yes	Partial	In CSM Browser Client, view and export only.
Task Pane	Yes	Alternative	In CSM Browser Client, use Related Items Solution Search for similar search functionality.
Toolbars	Yes	Partial	In CSM Browser Client, no ability to create a custom toolbar or use the toolbar created in CSM Desktop Client.
Visualizations	Yes	Partial	In CSM Browser Client, view only. Also, the Browser Client Visualization window does not include a menu bar.

Features	CSM Desktop Client	CSM Browser Client	Differences
Widgets	Yes	Partial	In CSM Browser Client, view and drill-down only. **Note:** Actions on Twitter widgets are not supported in the CSM Browser Client.

One-Step Actions in the Browser Client

The One-Step Actions accessed and run in the Browser Client are created in the CSM Desktop Client or in CSM Administrator. One-Step Actions cannot be created, edited, or deleted in the Browser Client.

In the Browser Client, users can run One-Step Actions from:

- The menu bar (run from the One-Step Action Manager or the list of Most Recently Used (MRU) One-Step Actions).
- Buttons, links, and widgets on dashboards.
- Business Object records (as buttons or links). Some One-Step Actions might also run as Automatic Actions that are executed when a Business Object is saved.
- The One-Step Action Manager (accessed from the menu bar).
- An Actions menu on a grid.

Good to know:

- When One-Step Actions execute in the Browser Client, the interface appears as disabled until the One-Step Actions complete.
- Print Actions are supported in the Browser Client and Portal when Trusted Agents are used to run the Actions. This includes Run a Report Actions that are configured to print a report. SaaS customers can configure a Trusted Agent to use printers on their remote network; on-premises customers can configure a Trusted Agent to use printers on their local network or on a remote network. If you do not configure Trusted Agents, users receive an error indicating that Print Actions are not supported when the One-Step Actions is run on the Browser Client or Portal.
- When One-Step Actions that contain multiple Actions are executed in a CSM web application, the end result of the One-Step Action is shown to users when execution is complete. Users are prompted for input as needed, but if the **Save Business Object After Action** check box is cleared for a particular Action, changes made by the Action are not saved.
- There is currently no option in the Browser Client to run a One-Step Action for a group. You can, however, configure a One-Step Action to run against a specific saved search. In this case, the One-Step Action runs against the defined group of records, regardless of the client used to run the One-Step Action. For more information, see Define the Conditions for a One-Step Action.
- Write file, read file, run program, and transfer attachments (to or from a file system) One-Step Actions generally works for the CSM Browser Client, but the One-Step Action must be designed to write an accessible file on the server, and then execute a program on the server using the contents of that file. This requires configuring IIS security rights specifically to handle this capability.
- When a One-Step Action executes in the CSM Browser Client, a progress bar is not displayed.

CSM Browser Client Good to Know

Use these tips for helpful information on the CSM Browser Client.

- Some features behave differently in the Browser Client than they do in the Desktop Client. See CSM Client Feature Parities and Differences.
- The Browser Client menu bar collapses into a hamburger menu on mobile screens and browser windows sized below 768 pixels. It cannot be configured, but the CSM Items accessed from the menu bar are driven by configurations and personal settings in the Desktop Client. For example, a saved search can be created and saved in the Desktop Client, and then used in the Browser Client.
- The Browser Client consumes a CSM license. Licensing controls how many users can log into CSM. CSM uses a concurrent or "floating" licensing model. This means that a fixed number of licenses are shared among a group of users/customers, and that a fixed number of people can simultaneously access the product. License codes determine the number of people who can log in at any given time.
- Some forms have a special browser view. This means some information in a form is displayed (such as client name), while other sensitive or secure information (such as social security number) is blocked out. While this is predominantly the case with the CSM Portal, the Browser Client can be configured to do this through CSM Administrator.
- Security rights control access to CSM functionality and are configured in the Security Group Manager in CSM Administrator (**Security > Edit Security Groups**). For more information, see Configure Browser and Mobile Device Security Rights.

Use the Browser Client

Use the Browser Client to access most of the features available in the CSM Desktop Client.

For example, when working with the Browser Client, you can:

- Log records.
- View and run Searches and access queues.
- View and run One-Step Actions.
- Send emails.
- View dashboards and widgets.
- View HTML pages.
- View and run reports.
- View visualizations.
- View calendars.
- Access Knowledge Articles.
- Scan and search for barcodes.
- Use tools: Contact Manager, Table Management interface, and CMDB interface.

Log in to the Browser Client

Before accessing the Browser Client, the appropriate credentials must be assigned. Credentials are managed on the User's Profile in CSM Administrator.

To log in to the Browser Client:

1. Provide the URL: **http://***server***/CherwellClient** where *server* is the location where CSM is installed (either locally on the machine or on a specific server outside the local machine).
2. Provide the login credentials (User ID and Password). These should have been assigned by the implementer or system administrator.

   Note: If Windows/LDAP login is enabled, provide the Windows credentials used to log in to the system.

3. Click **Login**.

   If assigned to more than one CSM Role (and have not previously selected the Automatically Use Selected Role check box), the Choose your Role window opens.

   Note: A Role is a User/Customer's current function/responsibility in CSM, and controls how data is presented in that person's CSM environment. For example, a Role determines which Home Dashboard is displayed and how the Incident form looks (example: Which fields are exposed, required, etc.). A Role is assigned to a Security Group and can be assigned to more than one Security Group at a time. A User/Customer can access any of the Roles in his Security Group, but can only log in using one Role at a time. Examples of Roles include Service Desk Manager and Portal Customer.

4. Select the login Role for the session:
   a. Role: Click the appropriate **Role**.
   b. Always Use Selected Role: Select this check box to automatically use the selected Role at the next log in. This bypasses the Role prompt.
5. Click **Submit**.

Log a Record in the CSM Browser Client

Browser Client records are very similar in appearance and functionality to Desktop Client records.

To log a record in the Browser Client:

1. Log in to the Browser Client.
2. On the Browser Client menu bar, select **New**.
3. Select the **type of record** from the drop-down (example: New Incident). The record opens in the main pane.
4. Complete using the appropriate workflow and save the record.

Search for Knowledge in the Browser Client

Users can search Knowledge Articles from an open record and place found solutions within the record for future reference.

To search for Knowledge from an open record:

1. Open the record for which you want to find a solution.
2. Select the**Knowledge** button on the toolbar.
3. Select the **Source** of the Knowledge Article (known errors, open Incidents, Knowledge Articles, or attachments). For attachments, the search returns results that match the text within .txt, .doc, and .xls files and will return any file type with a matching file name.
4. Specify a word or phrase to search.
5. Select **Search**.
6. Select a **Knowledge Article** to view.
7. Select the **Use Solution** button to place the Knowledge Article information into the record.

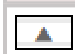
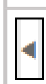
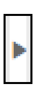
Resize Forms Using Splitters

In the Browser Client and Portal, Forms contain splitters that help users resize the Form Arrangement using both horizontal and vertical splitters.

Good to know:

- In an open record, the horizontal splitter above the Form Arrangement (child object tabs) adjusts the overall height of the Form Arrangement. The vertical splitter in the middle of the Form Arrangement adjusts the overall width of the Form Arrangement if the tab features more than one section.
- Adjust the Form Arrangement by clicking anywhere on the splitters except for the Show/Hide Form Arrangement arrows and the Show/Hide Child Object Details arrows.
- The splitter location defaults to the setting for that form, as defined in the Business Object Form Arrangement Editor. After adjusting the splitter location, the new location will be saved and used for that Business Object until the browser tab or window closes. After opening the site and logging in again, the splitter location will default back to the placement settings for the form for that Business Object. This setting does not persist across browsers.

There are several buttons and icons featured in the form splitters.

Button/Icon	Action	Description
 Or 	Show or Hide Form Arrangement	Shows a currently hidden Form Arrangement or hides a currently visible Form Arrangement.
 Or 	Separators	Indicates that the splitter bars can be dragged-and-dropped where needed.
 Or 	Show or Hide Child Object Details	Shows the child object, including details or additional forms, or hides the child object details or additional forms so only the child object Grid is visible.

To show or hide the Form Arrangement:

- Click the **Show Form Arrangement** arrows to show a currently hidden Form Arrangement.

To expand the Form Arrangement so that it fills the full area of the record, click the **Show Form Arrangement** arrows a second time.

- Click the **Hide Form Arrangement** arrows to hide a currently displayed Form Arrangement.

  To hide the Form Arrangement after expanding it to fill the entire area of the record, click the **Hide Form Arrangement** arrows twice: once to return the Form Arrangement to its original size, and then again to hide it completely.

To adjust the overall height of the Form Arrangement:

- Click and hold the **horizontal splitter** above the Form Arrangement and then move the **horizontal splitter** up or down until the Form Arrangement is the desired height.

To show or hide a child object's details or additional forms:

- Click the **Show Child Object Details** arrows to show both the child object (example: Task) and its additional details or forms (example: Task form).

  To expand the child object's additional details or forms on the right-hand side of the Form Arrangement space, click the **Show Child Object Details** arrows a second time.

- Click the **Hide Child Object Details** arrows to hide the additional details or forms.

  To hide the additional details or forms after expanding them to fill the entire area of the Form Arrangement, click the **Hide Child Object Details** arrows twice: once to return it to its original size, and then again to hide it completely and only display the child object's Grid.

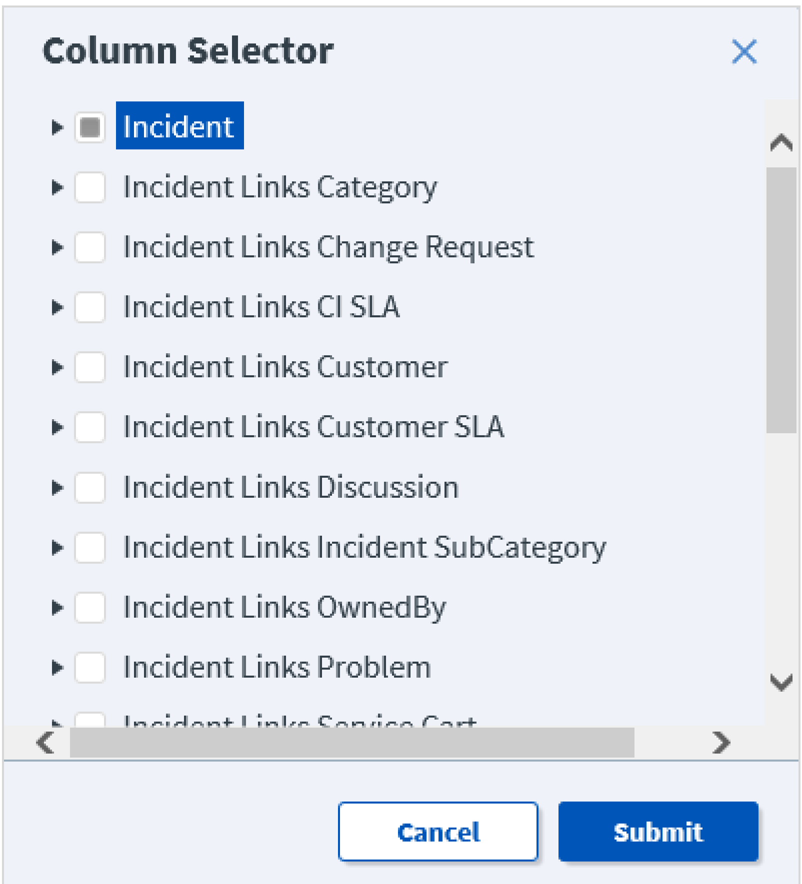
To adjust the overall width of the child objects and their details or additional forms:

- Click and hold the **vertical splitter** in the middle of the Form Arrangement and then move the **vertical splitter** left or right until the child object and its details are the desired width.

Add and Remove Columns from a Grid in the Browser Client

Use the Column Selector in the Browser Client to add or remove columns from the Grid.

1. Open a Grid using an applicable feature.
2. Click the **Columns** button on the Browser Client toolbar.
   The Column Selector opens displaying the Business Object's relationships and associated fields. Relationships and fields currently displayed in the Grid are indicated by a check mark. Close the Column Selector at any time by clicking the Cancel button.



3. Add columns to the Grid by selecting one of the following:
   - The **check box** next to one or more Relationships in the top level of the tree (example: Incident Links Customer) to add all fields associated with the Relationship as columns in the Grid.
   - The **check box** next to one or more fields in the second level of the tree (example: Department, Manager) to add only the field(s) you select as columns in the Grid.

4. Remove columns from the Grid by deselecting one or more **check boxes** in either the top level or second level of the tree.
5. Click the **Submit** button.
   If you added columns, the associated field(s) display on the right side of the Grid and can be moved anywhere in the Grid by dragging-and-dropping the column to the desired location.

Search in the CSM Browser Client

The **Searches** option in the CSM Browser Client main menu behaves very similarly to those in the CSM Desktop Client.

These search behaviors include:

- Use the Search Manager to create, edit, and delete saved searches or use the Quick Search Builder to create and run a one-time search. Both are accessed via the Searches drop-down list on the menu bar.
- Queues can be run from the Queue Manager in the CSM Browser Client, but cannot be created, edited, or deleted. The Queue Manager and MRU Queues are accessed via the Search drop-down list on the menu bar.

Good to Know:

If a Business Object has been previously applied to your system as part of a Protected mApp™ Solution:

- You see a shield icon  next to each content-protected search.
- You can't edit or delete a content-protected search.
- See Protected mApp Solutions.

To run a search:

1. From the CSM Browser Client main menu (for more information, see Browser Client Menu Bar), select the **Searches** drop-down list.
2. Select an option from the drop-down list:
    - **Search Manager:** Create and/or run a defined search.
    - **Quick Search Builder:** Create and run a quick search.
    - **Queues:** Select and run a queue from the Queue Manager.
    - **Download Power BI Data Connector:** Download the Power BI Data Connector to use with third-party reporting tools. For more information, see Using Search Data with Third-Party Reporting Tools.

    The results display in the Main Pane.

    If card view is enabled for a Business Object, search results are displayed as medium or large cards. To view a specific record in card view, select an item from the results list or the title link in a card.

    In card view, you can access:
    - **Navigation:** Use page numbers and arrow buttons that allow you to navigate between pages of results.
    - **Side menu:** Access options, such as showing the currently selected record or showing results in a grid view, sorting results by a field in ascending or descending order, and changing card size.

Note: To ensure that card size selections persist and do not revert to the default, uninstall WebDAV in Internet Information Services (IIS).

- **Ellipsis**: Access a menu of actions available for the Business Object. Actions can be run directly from the card view without drilling down into a record.

When viewing the Search results, more options become available in the **Search** menu drop-down list that allow users to edit the current search and save the current search.

Related concepts

About Roles

Scope

Protected mApp™ Solutions

Protected mApp™ Solution FAQs

Send Email in the Browser Client

You can send an email from the Browser Client multiple ways:

- Select **Email > Send Email** in the menu bar from anywhere in the Browser Client. You select the recipients when using this option.
- Select **Email > Current Customer** in the menu bar when a Business Object record is active.
- Select an e-mail address on a Business Object record.
- Run a One-Step Action configured with an email Action directly from the One-Step Action Manager.

Note: Emails are sent from a defined default account. If you have not configured e-mail for CSM, see e-mail accounts documentation.

Scan a Barcode

Note: It's important to have good lighting in order to properly capture the barcode.

1. Launch the `BarcodeScan` command on a Business Object form or from the CMDB.
   Your mobile device camera will be activated.

   Note: If you click **Don't Allow**, you will be returned to the Business Object form.

2. Scan the barcode with your mobile device camera.
   Instead of scanning the barcode, you can manually enter it in the Value field of the BarcodeScan attribute.
3. Complete the required fields and click **Save**.

Related concepts

Configure the Browser Client to Scan Barcodes

Related tasks

Search for a Barcode

Search for a Barcode

You can search for a barcodes in CSM's Configuration Management Database (CMDB). The barcode can either be manually entered in the search field, or from the barcode scanner. Launch the barcode scanner by clicking **Scan Barcode**.

Related concepts

Configure the Browser Client to Scan Barcodes

Related tasks

Scan a Barcode

Configure the Browser Client

Browser Client configuration steps are completed in CSM Administrator.

Configure CSM Web Application Settings (URLs, Timeouts, RSS Feeds)

Use the **Browser Application Settings** window inCSM Administrator to configure web application settings.

You can:

- Define URLs to the Browser Client and CSM Portal.
- Set session timeout. In CSM Browser Client and CSM Portal, users are given a warning two minutes before the specified timeout is reached, with an opportunity to remain logged in. If they do not choose to remain logged in, they are logged out when the timeout is reached.

  Tip: We recommend setting the session timeout to 90 minutes. You will also need to configure the application pool in IIS to have a value of at least 5 minutes greater than the session timeout. CSM cannot make this change directly.

- Enable or disable embedded frames, choose to send detailed error information to the client, control linked attachments (attachments via links instead of direct file attachment), and disable password auto-complete.

To configure web application settings:

1. In CSM Administrator, open the **Browser Application Settings** window (**Browser and Mobile > Browser Application Settings**).
2. Configure URLs that are used to generate a URL for launching one of the web applications (example: when sending out approvals).
   - Specify the base URL for the CSM Portal (example: https://MyServer/CherwellPortal).
   - Specify the base URL for the CSM Browser Client (example: https://MyServer/CherwellClient).
3. Set a **Session Timeout**, which is the number of idle minutes the system should wait before timing out inactive sessions.
4. Configure web application security settings:
   - Select the **Do not allow the browser applications to be embedded in a frame** check box to disable web applications from being embedded within the frame of another web page.
   - Select the **Do not send detailed error information to client** check box to prevent the web applications from sending detailed error information when errors occur.
   - Select the **Disable linked attachments in the browser applications** check box to disable attachments created from links instead of direct attachments.
   - Select the **Disable password auto-complete on login page** check box to disable auto-complete for passwords during login. This requires users and customers to type their full passwords every time they try to log in to the web applications.
5. Select **OK**.

Define the Default Domain and Anonymous Login Settings

By default, if using Windows or Active Directory, Users must specify the domain as part of the login credentials (example: Applications\Bob).

Specifying the domain is how CSM identifies the fact that Users are specifying Windows/LDAP credentials vs. internal Cherwell credentials. However, if all Cherwell Users are generally on the same domain, specify that as the default domain. The Cherwell Portal automatically assumes that any credentials detailed without a specific domain are Customers of the default domain.

Use the **General** page in the **Security Settings** window (in CSM Administrator) to define the following general system security settings for the CSM Browser Client and Customer Portal:

- Default domain
- Anonymous login settings

Configure the default domain and anonymous login settings:

1. In the CSM Administrator main window, select **Security > Edit security settings**.
2. Select **General**.
3. Specify a default domain for the network:
    a. Default domain: Specify the default domain name for the network. The domain is used in any place where a domain is needed but not otherwise provided, such as automatically assigning credentials to Customers.

    Note: Select **Arrow** () to have CSM auto-populate the name.

4. Configure anonymous login settings:
    a. **Allow Anonymous Login**: Select this check box to allow CSM Web Applications to read basic setup information from the system without User login and to enable the Anonymous Security Group access to items specifically configured for Anonymous view.
    b. **Security group when not logged in**: Select the Anonymous Security Group (OOTB: *Anonymous Browser*) that should be used by CSM Web Applications before any User/ Customer has logged in.
5. Select **OK**.

Configure Login, Authentication, and Inactivity Settings for the CSM Portal and CSM Browser Client

By default, the CSM Web Applications (Browser Client and CSM Portal) use the same login mode and authentication settings as those configured for the Desktop Client; however, users can define different settings if needed.

To configure login, authentication, and inactivity settings for the Browser Client and CSM Portall:

1. In CSM Administrator, select **Security > Edit security settings**.
2. Select **Browser Client** or **Browser Portal**.
3. Clear the **Use Same Settings as Desktop Client** checkbox.
4. In the **Supported login modes** section, select the login modes that you want to support:

   Note: Users can enable multiple login modes so if one authentication fails or the user/customer cancels the process, the next configured login method is invoked (SAML, then external authentication server, then LDAP, then Windows, then Internal). Not all of these options will appear in the system if they have not been configured.

   When you use a secure login configuration (SAML, LDAP, or Windows), we strongly recommend that you activate the RedirectHttpToHttps flag in the CSM Portal and Browser Client for better security. The flag forces requests sent over HTTP protocol to use HTTPS instead.

   - Internal: Allows CSM authentication. CSM authenticates the CSM Login ID and Password defined in the CSM Administrator User Profile (**Security > Edit Users**) or Customer Credentials (**Customer > Portal Settings**).

     To use internal login credentials on a default domain, users must type **CHERWELL** in front of the user name (example: CHERWELL\Bob) to be able to log in.

   - LDAP: Allows Directory Service authentication. CSM authenticates login credentials using a Directory Service such as LDAP or Active Directory. Depending on configuration, user/customer data can be imported based on LDAP data.
   - SAML: Allows Security Assertion Markup Language (SAML) authentication.
   - Windows: Allows Windows Authentication. CSM authenticates the Windows login credentials if set in the CSM Administrator User Profile (**Security > Edit Users**) or Customer Credentials (**Customer > Portal Settings**).
5. Configure general login options:
   a. Validate Windows/LDAP credentials on server: If you clear this checkbox, Windows credentials are validated on the client, which is not as secure unless you have full control of your network. If you select the checkbox, the system cannot automatically log in the user/customer without

asking, (the user will have to type their credentials) but it is much more secure. For this feature to work, the server must have access to the Windows Domain or LDAP server.

For best results, configure your server to use encrypted communication before enabling this feature so that credentials are not passed to the server in a potentially sniffable format.

b. Allow logging of authentication code (for troubleshooting): Select this checkbox to enable logging of authentication calls to troubleshoot configuration (example: When configuring LDAP setup). Then, use the Server Manager to enable logging in the CSM Portal and Browser Client.

6. Select **OK**.

Related concepts

Define the Default Domain and Anonymous Login Settings

Integration with Directory Services Workflow

About SAML

Windows Credentials

Related tasks

Prevent Browsing HTTP from HTTPS

Prevent Browsing HTTP from HTTPS

Browse HTTP from HTTPS is a vulnerability allowing HTTPS pages to be accessed via HTTP, thus disclosing potentially sensitive information. We strongly suggest enforcing the redirection of HTTP requests to HTTPS via a setting in Overwatch.

To redirect HTTP request to HTTPS:

1. Use the Command-Line Configure utility to pass the following command to Overwatch. This enforces redirection in the CSM Portal.

   ```
   /updateportalsettings /redirecthttptohttps=true
   ```

2. Use the Command-Line Configure utility to pass the following command to Overwatch. This enforces redirection in the CSM Browser Client.

   ```
   /updatebrowserclientsettings /redirecthttptohttps=true
   ```

3. Reset IIS.
4. Review the configuration of any applications you have installed to ensure proper permissions are in place to prohibit forceful browsing of HTTPS resources.

Configure Anonymous Login Settings for CSM Web Applications

Use the CSM Administrator Security Settings General page to configure the anonymous login settings for CSM Web Applications.

To allow CSM Web Applications to read basic setup information from the system and to enable Anonymous Security Group access to items specifically configured for Anonymous view:

1. Open CSM Administrator and select **Security > Edit security settings**.
2. Select **General**.
3. Configure anonymous login settings:
    a. **Allow Anonymous Login**: Select this check box to allow CSM Web Applications to read basic setup information from the system without User login and to enable the Anonymous Security Group access to items specifically configured for Anonymous view.
    b. **Security group when not logged in**: Select the Anonymous Security Group (OOTB: *Anonymous Browser*) that should be used by CSM Web Applications before any User/Customer has logged in.
4. Select **OK**.

Configure Browser Client (User) Login Credentials

CSM uses a User's login credentials to log them into the Browser Client. Login credentials are stored in the User Profile. This must be configured through CSM Administrator and cannot be done from the Browser Client.

Configure Miscellaneous Settings for Web Applications

Several web.config files contain certain settings for the CSM Web Applications, including the Browser Client, CSM Portal, and, in some cases, the Cherwell® REST API. These settings are handled by Overwatch, and you can edit them using the Command-Line Configure utility.

For best results, restart Internet Information Services (IIS) after you modify web application settings. See Overwatch Command-Line Options for more information on available Command-Line Configure options for web applications.

Change Prompt Time-out Period

Prompts generated by a One-Step Action, expression, or stored search remain open in the web applications for 2 minutes by default. If users do not respond to the prompt within that time frame, the prompt closes.

To change the default time-out period for the Browser Client, use the Command-Line Configure utility to pass the following command to Overwatch:

```
/updatebrowserclientsettings /UIInteractionTimeoutInSeconds={number of seconds}>
```

To change the default time-out period for the CSM Portal, use the Command-Line Configure utility to pass the following command to Overwatch:

```
/updateportalsettings /UIInteractionTimeoutInSeconds={number of seconds}>
```

Disable Label Resizing

Note: We do not recommend disabling label resizing.

While not recommended, to disable the resizing of labels that are set to dynamically auto-size in the Browser Client, use the Command-Line Configure utility to pass the following command to Overwatch:

```
/updatebrowserclientsettings /AutoSizeLabels=False
```

To disable the resizing of labels that are set to dynamically auto-size in the CSM Portal, use the Command-Line Configure utility to pass the following command to Overwatch:

```
/updateportalsettings /AutoSizeLabels=False
```

Disable Scripts in Reports

By default, users can run a report that contains scripts if they have rights to run the report. You can disable scripts from running in all reports, however. This may cause errors when users run reports that contain scripts, but may improve security.

By default, scripts are enabled for reports.

To disable scripts in all reports in the Browser Client, use the Command-Line Configure utility to pass the following command to Overwatch:

```
/updatebrowserclientsettings /allowscriptsinreports=false
```

To disable scripts in all reports in the CSM Portal, use the Command-Line Configure utility to pass the following command to Overwatch:

```
/updateportalsettings /allowscriptsinreports=false
```

Execute Embedded HTML and Script

Note: We do not recommend allowing embedded HTML and script.

To allow HTML and script embedded in labels to be executed in the Browser Client, use the Command-Line Configure utility to pass the following command to Overwatch:

```
/updatebrowserclientsettings /AllowUnsafeLabels=True /AuthLogFile={filepath
}
```

To allow HTML and script embedded in labels to be executed in the CSM Portal, use the Command-Line Configure utility to pass the following command to Overwatch:

```
/updateportalsettings /AllowUnsafeLabels=True /AuthLogFile={filepath}
```

HTTPS-Only Cookies

In production environments, we strongly recommend that sensitive cookies (like those used to maintain your session) be marked as "Secure," meaning they will only be transferred with requests that are made over HTTPS, and HTTP-only. They will not be accessible to Javascript running in the browser.

In order to take advantage of this configuration, perform the following steps:

1. Ensure the web application is running on an IIS instance that listens on both :80 (HTTP) and :443 (HTTPS).
2. Ensure IIS (or a web.config file, or some other handler) is set up to automatically redirect http://hostname/path to https://hostname/path.
3. Add the following line to these web.config files:
    - C:\Program Files\Cherwell Browser Applications\Portal
    - C:\Program Files\Cherwell Browser Applications\CherwellClient
    - C:\Program Files\Cherwell Browser Applications\CherwellService

```
<httpCookies
httpOnlyCookies="true"
requireSSL="true" />
```

For more details, see https://msdn.microsoft.com/en-us/library/ms228262(v=vs.100).aspx.

In-line Browser Display Extensions

To specify other in-line browser display extensions that should open inside of a browser window in the Browser Client, use the Command-Line Configure utility to pass the following command to Overwatch:

```
/updatebrowserclientsettings /InlineBrowserDisplayExtensions={.pdf or .xml file name}
```

To specify other in-line browser display extensions that should open inside of a browser window in the CSM Portal, use the Command-Line Configure utility to pass the following command to Overwatch:

```
/updateportalsettings /InlineBrowserDisplayExtensions={.pdf or .xml file name}
```

Note: Browsers that are not Microsoft Edge (example: Chrome™, Mozilla Firefox®, etc.) handle in-line browser display extensions more automatically, but Edge requires this to be set. PDF and XML files are handled this way by default.

Configure the Browser Client to Scan Barcodes

You can configure the CSM Browser Client to enable users to scan asset barcodes using the camera on a mobile device.

Through the CSM Browser Client, you can use a mobile device camera as a barcode reader to scan asset tags and upload photos to tickets.

The following types of barcode readers are supported:

- **Code 128**: code_128_reader
- **EAN**: ean_reader
- **EAN-8**: ean_8_reader
- **Code 39**: code_39_reader
- **Code 39 VIN**: code_39_vin_reader
- **Codabar**: codabar_reader
- **UPC**: upc_reader
- **UPC-E**: upc_e_reader
- **Interleaved 2 of 5**: i2of5_reader
- **2 of 5**: 2of5_reader
- **Code 93**: code_93_reader

Prerequisite: Before users can scan barcodes from within the CSM Browser Client, you must add the BarcodeScan attribute to the Business Object and add a field to store the barcode value.

Add the BarcodeScan Attribute

To add BarcodeScan to the Business Object for a Configuration Item:

1. In CSM Administrator, create a new or edit an existing Blueprint.
2. Select a Business Object, such as **Config - Server**.
3. In the right pane, under **Structure**, select **Edit Business Object**.
4. Select **Bus Ob Properties**.
5. Select **Advanced**, then select the **down arrow** () next to **General attributes**.
6. In the **Attribute** field, enter `BarcodeScan`.
7. Do one of the following:
    - Leave the attribute value blank; the system will use all the barcode reader types specified above.
    - Specify the barcode reader types you want to support as a comma-delimited list in the attribute value field: This increases scan reliability.

Note: Barcode reader types can only be set at the Business Object level.

8. Select **OK**.

Add a Field to Store the Barcode

To add a field to store the barcode:

1. Open the Business Object that has the `BarcodeScan` attribute, and then:
   a. Add a new field or select an existing field.
   b. Open the Field Properties window.
   c. Select **Advanced**, then select the **down arrow** () next to **General attributes**.
   d. In the **Attribute** field, enter `BarcodeScan`.
   e. Select **OK**.
2. Under **Appearance**, select **Edit Form**.
3. Drag the type of control you want to use onto the form, then right-click and select **Control properties.**
4. Select **Commands > Other**.
5. Select the `ScanBarcode` command, and add it as the command for a control to launch the barcode scanner. The result will appear in the Barcode Field on the form.
6. Select **OK**.
   You can now launch the barcode scanner from a Business Object form.

Once you have set up the BarcodeScan attribute in the Business Object and added a field to store the barcode, you can use it to enable scanning from a mobile device.

Related tasks
Scan a Barcode
Search for a Barcode

Set the Location of a Business Object

In the Browser Client, the current location of any Business Object can be set automatically, through location services, or manually, so that you know its location and can access it when necessary.

To set the location of any Business Object:

1. In CSM Administrator, create a new blueprint or open an existing blueprint.
2. Select a Business Object, such as **Configuration Item > Computer**. You can add the Location attribute to any Business Object.
3. In the right pane, under Structure, select **Edit Business Object**.
4. Click **Bus Ob Properties**.
5. Select **Advanced**, then select the down arrow () next to **General attributes**.
6. In the Attribute field, enter `LocationAware.` The Value field can remain `(null).`
   This makes the Business Bbject location-aware.
7. Click **OK**.
8. Add the Lattitude, Longitude, and Altitude attributes to any single Field in your Business Object:
   a. In the Business Object Editor, select any Field in the list, then click **Field Properties**.
   b. Select **Advanced**.
   c. Select the down arrow () next to **General attributes**.
   d. In the Attribute field, enter `LocLatitude.`
      The location data will be stored in the Value field.
   e. Repeat steps a - d for Longitude (`LocLongitude`) and Altitude (`LocAltitude`).

   Note: Altitude (`LocAltitude`) is only supported on mobile phones and tablets.

Optional: You can also edit the Business Objects Form to add controls for these fields. For more information, see Forms.

Expressions
Latitude and Longitude Fields can also be added to Expressions or One-Step Actions so you can use them in mapping software such as Google Maps. Use a text Expression on a link label or a button associated with an Action and use the documented URL. For example, if you use Google Maps, the URL will be something like `https://www.google.com/maps/search/?api=1&lat,long`. Add the Fields for `lat,long` into your Expression or One-Step Action.

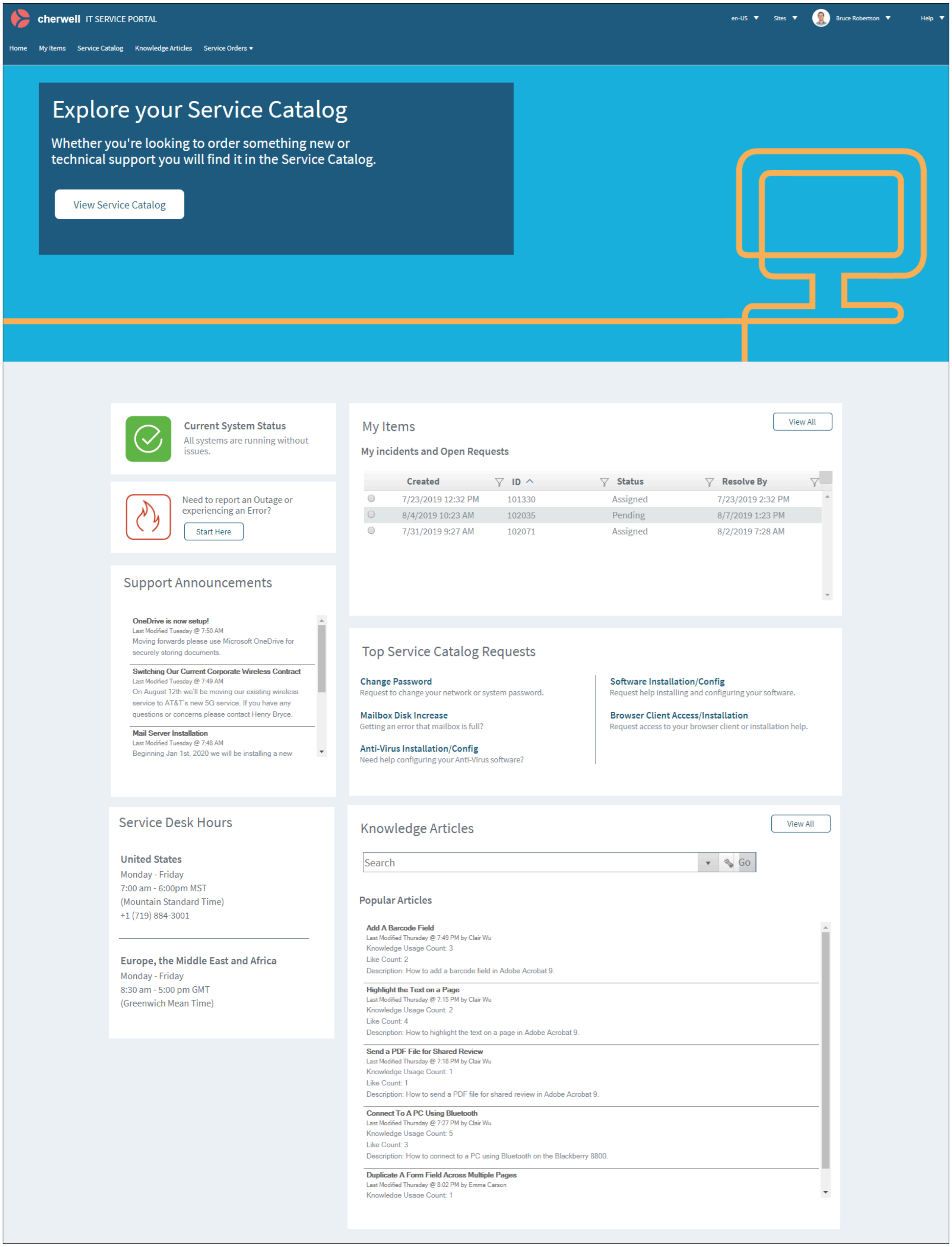
CSM Portal

The CSM Portal is a highly configurable web application that enables customers to securely and conveniently access their CSM data using a browser. The CSM Portal supports multiple sites, and also allows managers to access their team's data.

About Customer Portals

Customers can perform several tasks when using a CSM Portal.

- Access a Service Catalog.
- Log Incidents and Service Requests.
- Complete common self-service functions (example: Reset a password).
- Access Knowledge Articles.
- Access a document repository, if configured.
- Monitor important metrics via a dashboard.


cherwell IT SERVICE PORTAL
en-US
Sites
Bruce Robertson
Help
Home
My Items
Service Catalog
Knowledge Articles
Service Orders
Explore your Service Catalog
Whether you're looking to order something new or technical support you will find it in the Service Catalog.
View Service Catalog
Current System Status
All systems are running without issues.
Need to report an Outage or experiencing an Error?
Start Here
Support Announcements
OneDrive is now setup!
Moving forwards please use Microsoft OneDrive for securely storing documents.
Switching Our Current Corporate Wireless Contract
On August 12th we'll be moving our existing wireless service to AT&T's new 5G service. If you have any questions or concerns please contact Henry Bryce.
Mail Server Installation
Beginning Jan 1st, 2020 we will be installing a new
My Items
View All
My incidents and Open Requests
Created
ID
Status
Resolve By
7/23/2019 12:32 PM
101330
Assigned
7/23/2019 2:32 PM
8/4/2019 10:23 AM
102035
Pending
8/7/2019 1:23 PM
7/31/2019 9:27 AM
102071
Assigned
8/2/2019 7:28 AM
Top Service Catalog Requests
Change Password
Request to change your network or system password.
Mailbox Disk Increase
Getting an error that mailbox is full?
Anti-Virus Installation/Config
Need help configuring your Anti-Virus software?
Software Installation/Config
Request help installing and configuring your software.
Browser Client Access/Installation
Request access to your browser client or installation help.
Service Desk Hours
United States
Monday - Friday
7:00 am - 6:00pm MST
(Mountain Standard Time)
+1 (719) 884-3001
Europe, the Middle East and Africa
Monday - Friday
8:30 am - 5:00 pm GMT
(Greenwich Mean Time)
Knowledge Articles
View All
Search
Go
Popular Articles
Add A Barcode Field
Knowledge Usage Count: 3
Like Count: 2
Description: How to add a barcode field in Adobe Acrobat 9.
Highlight the Text on a Page
Knowledge Usage Count: 2
Like Count: 4
Description: How to highlight the text on a page in Adobe Acrobat 9.
Send a PDF File for Shared Review
Knowledge Usage Count: 1
Like Count: 1
Description: How to send a PDF file for shared review in Adobe Acrobat 9.
Connect To A PC Using Bluetooth
Knowledge Usage Count: 5
Like Count: 3
Description: How to connect to a PC using Bluetooth on the Blackberry 8800.
Duplicate A Form Field Across Multiple Pages
Knowledge Usage Count: 1

A Portal comprises one or more configurable Portal sites, each of which can display completely different information. For example, there might be a primary IT site, but also different sites for other departments or functions. Any particular site can be made up of a number of site items.

Several starter Portal sites are available to you. These include Portal-specific forms, dashboards, and more. For example, CSM provides a IT Services Management (ITSM) Portal Site. The site is built using OOTB site items, such as a Service Catalog, forms specific to the Portal, dashboards specific to the service desk, and predefined properties (header/footer, menu bar). You can implement and use any OOTB IT Portal Site as provided, modify it, or create new sites to meet the needs of your organization.

Related concepts

Portal Sites

Site Items

OOTB IT Portal Site

Portal Site Design Ideas

Create a Custom Portal

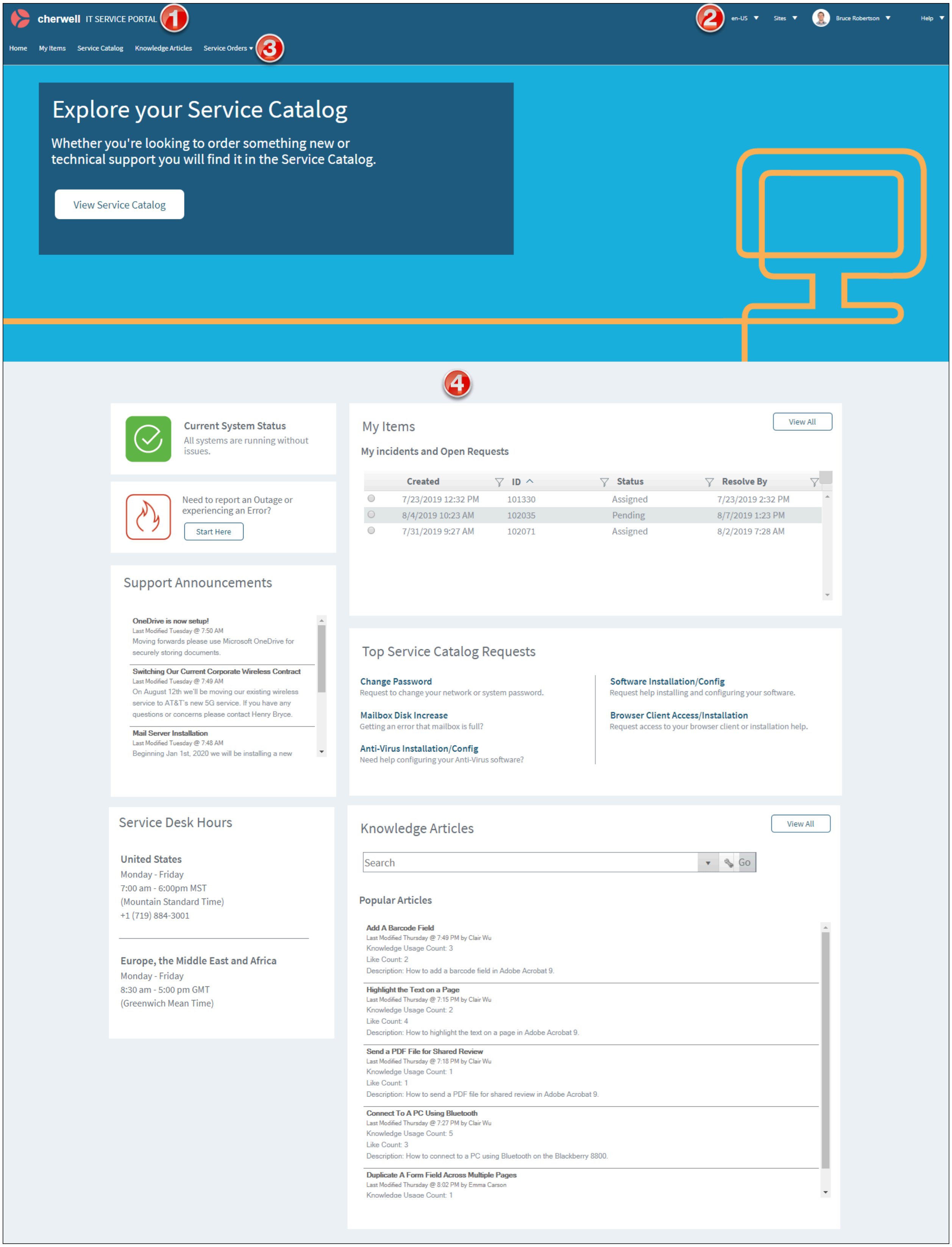
Portal Sites

A Portal site is a collection of self-service information in a CSM Portal that is dedicated to a topic or function.

A Portal can display one or more sites. For example, it might display:

- A company support site (single site Portal).
- A site for each department (HR, Facilities, Support).
- A site for each locale (US, Germany, Chile), although a single site can be configured to be available in multiple languages.

A Portal site is highly configurable and can be tailored to meet branding and layout needs. The site can display an application bar (Login, Site Selector), an informative banner/footer, a menu bar, a search control, and a startup item (example: A dashboard).


cherwell IT SERVICE PORTAL
1
2
en-US
Sites
Bruce Robertson
Help
Home
My Items
Service Catalog
Knowledge Articles
Service Orders
3
Explore your Service Catalog
Whether you're looking to order something new or technical support you will find it in the Service Catalog.
View Service Catalog
4
Current System Status
All systems are running without issues.
Need to report an Outage or experiencing an Error?
Start Here
Support Announcements
OneDrive is now setup!
Last Modified Tuesday @ 7:50 AM
Moving forwards please use Microsoft OneDrive for securely storing documents.
Switching Our Current Corporate Wireless Contract
Last Modified Tuesday @ 7:49 AM
On August 12th we'll be moving our existing wireless service to AT&T's new 5G service. If you have any questions or concerns please contact Henry Bryce.
Mail Server Installation
Last Modified Tuesday @ 7:48 AM
Beginning Jan 1st, 2020 we will be installing a new
My Items
View All
My incidents and Open Requests
Created
ID
Status
Resolve By
7/23/2019 12:32 PM
101330
Assigned
7/23/2019 2:32 PM
8/4/2019 10:23 AM
102035
Pending
8/7/2019 1:23 PM
7/31/2019 9:27 AM
102071
Assigned
8/2/2019 7:28 AM
Top Service Catalog Requests
Change Password
Request to change your network or system password.
Mailbox Disk Increase
Getting an error that mailbox is full?
Anti-Virus Installation/Config
Need help configuring your Anti-Virus software?
Software Installation/Config
Request help installing and configuring your software.
Browser Client Access/Installation
Request access to your browser client or installation help.
Service Desk Hours
United States
Monday - Friday
7:00 am - 6:00pm MST
(Mountain Standard Time)
+1 (719) 884-3001
Europe, the Middle East and Africa
Monday - Friday
8:30 am - 5:00 pm GMT
(Greenwich Mean Time)
Knowledge Articles
View All
Search
Go
Popular Articles
Add A Barcode Field
Last Modified Thursday @ 7:49 PM by Clair Wu
Knowledge Usage Count: 3
Like Count: 2
Description: How to add a barcode field in Adobe Acrobat 9.
Highlight the Text on a Page
Last Modified Thursday @ 7:15 PM by Clair Wu
Knowledge Usage Count: 2
Like Count: 4
Description: How to highlight the text on a page in Adobe Acrobat 9.
Send a PDF File for Shared Review
Last Modified Thursday @ 7:18 PM by Clair Wu
Knowledge Usage Count: 1
Like Count: 1
Description: How to send a PDF file for shared review in Adobe Acrobat 9.
Connect To A PC Using Bluetooth
Last Modified Thursday @ 7:27 PM by Clair Wu
Knowledge Usage Count: 5
Like Count: 3
Description: How to connect to a PC using Bluetooth on the Blackberry 8800.
Duplicate A Form Field Across Multiple Pages
Last Modified Thursday @ 8:02 PM by Emma Carson
Knowledge Usage Count: 1

1. **Banner**: Displays site and background image, title, subtitle, and baseline text.
2. **Application Bar**: Displays the Language Selector, Site Selector, Login menu, and Help menu.
3. **Menu Bar**: Lists the site Items and/or supporting Actions. Select a **site item** to display its contents in the main pane or its list of supporting Actions. The Portal menu bar collapses into a hamburger menu on mobile screens and browser windows sized below 768 pixels.
4. **Main Pane**: Displays the Startup Item, which could be a dashboard, a report, a list of records, or the record currently being edited.

Site Items

When creating a Portal, add site items to be displayed on the site menu bar.

The following items can be included on a Portal site:

- **Actions** (including powerful create options and interactive One-Step Actions): Use on a site's menu bar to support site items (Create Incident or Display Document Repository) and enhance navigation. Actions can also be used on dashboards and HTML pages.
- **Action Catalogs**: Display a self-building and dynamic catalog of Actions that empower customers to help themselves (example: Create a Service Catalog that displays all your services with Actions to create Incidents and Service Requests).
- **Calendars**: Displays time-sensitive Business Object data in a calendar format.
- **Dashboards and Widgets**: Provide custom, insightful control panels capable of executing commands and providing real-time, at-a-glance information. For example, a customer-specific dashboard complete with a Twitter Feed, a list of announcements, and a list of open/closed Incidents.
- **Document Repositories**: Provide a collection of resourceful documents, such as Knowledge Articles, that encourage customers to resolve their own issues.
- **Forms/records**: Allow customers to expedite service by creating, viewing, and editing their own records, such as Incidents and Service Requests, and possibly other customer's records.
- **Grids**: Allow customers to view CSM data from a Business Object in a format that can be sorted and exported.
- **HTML Pages**: Display a system administrator-designed HTML-coded page or host a web page from an external site.
- **Knowledge**: Search for Knowledge Articles (KAs) using a Portal site's configured search control. When using a KA in the Portal, customers can vote on article popularity by selecting the **Like** button and add feedback by selecting the **Add a Comment** link.
- **Reports**: Provide metrics of your record data in a formatted and organized presentation.
- **Searching**: Offers searching so that customers can easily locate information about the Portal. Use CSM's supplied search control or create your own search widget.
- **Service Cart**: Provides an e-commerce tool that customers can use to add multiple services to a single order, and then temporarily hold the services until they are ready to submit their order.
- **Visualizations**: Display a visual map of linked records, customers or vendors.

Note: HTML pages are unique to the Portal. The other items are commonly used throughout CSM.

When a customer first accesses a site, a default Startup Item is displayed; this can be an Action Catalog (special widget), a dashboard, a document repository, an HTML page, a report, or a saved search (used to display a list of records). A customer can access other site items using the site menu bar. The Startup Item can also be accessed when users select the optional title logo/text or optional Home menu bar button.

Different startup items can be displayed upon login so information can be securely and appropriately filtered based on credentials. For example, display a Service Catalog to customers who are not logged in and then display a dashboard complete with a customer's Open Incidents for a customer who does log in.

To help build and manage the Portal and sites, CSM provides the Site Manager (manage sites at a high-level), the Site Wizard (create a cursory site), and the Site Editor and **Site Properties** window (edit/refine the way the site/site items look and behave). CSM also provides numerous CSM Item Managers that allow you to create site items, such as dashboards, HTML pages, and document repositories.

Related concepts

Portal Sites

About One-Step Actions

Navigate CSM Portal Knowledge Articles

CSM Desktop Client Quick Search Widget

Create a Search Widget

About Portal Actions

CSM provides several customizable Actions that can be added to and executed from the Portal menu bar, a dashboard, or an HTML page.

An Action is an activity that can be initiated manually (from a button, link, menu bar item, or widget) or automatically (from an Automation Process, One-Step™ Action, or Email Monitor) to execute a command (example: Print) or display/run a CSM item (example: Display a dashboard or run a search).

Examples include:

- Display Create commands for the Business Objects used on the Portal site (example: Create Incident).
- Display common searches (example: Search My Open Incidents).
- Display a Home button on the Portal menu bar to take customers back to the Startup Item.
- Display or run a CSM item (example: Action Catalog, report, document repository).

Some Actions are automatically added to the menu bar when creating a site using the Site Wizard. For example, a menu bar Item can be added for each Business Object associated with the site and a Document Repository Action is added if there is a document repository.

Manually add Actions or edit existing Actions by defining menu bar properties for a site.

Manually add the following Actions:

- **One-Step Action**: Runs a One-Step Action, which runs one or more other Actions:
    - Create/update/delete a Business Object.
    - Excel merge.
    - Execute a command.
    - Go to a field.
    - Go to a record.
    - Go to Action (branching).
    - Launch a URL.
    - Link/Unlink Business Objects.
    - Print.
    - Run another One-Step Action.
    - Run a program.
    - Run a report.
    - Send a Tweet.
    - Send an email.
    - Show a pop-up.
    - Step through children.

    - Transfer attachments.
    - Transfer Related Business Objects.
    - Update a variable or stored value.
    - Web service call.
    - Write to a file.
    - Work with a queue.
- **Command:** Runs a system command applicable to the Portal. Categories include:
    - **Managers:** Adds a command to launch a CSM Item Manager so that a customer can choose a CSM Item (Action Catalog, dashboard, document repository, One-Step Action, HTML page, report, or search) to open/run (example: Add the Report Manager to the site menu bar so that customers can choose to run an available report). Note: Recent Items lists must be placed inside folders (they cannot be at the top level of the menu bar), and it is recommend that they be placed as the last item in the folder.
    - **(Other) Business Object Search:** Provides common site searches (example: Business Object to search, how the results should be sorted, whether to limit to the current customer, or limit to open or closed records).
    - **(Other) Create Business Object:** Creates a new Business Object (record) but with several powerful options, such as a One-Step Action to run as part of the creation process and whether a custom form should be displayed (which can be different than the supplied form used for viewing a Business Object).
    - **(Other) Home:** Takes the customer to the Startup Item (example: Dashboard, HTML page).

      Note: This command must be placed in a folder.
- **Dashboard:** Displays a dashboard.
- **Report:** Runs a report.
- **Search:** Runs a saved search.
- **Page:** Displays an HTML page.
- **Doc Repository:** Displays a document repository.
- **Action Catalog:** Displays an Action Catalog (widget).

Related concepts

About One-Step Actions

About CSM Item Managers

Related tasks

Create a Site Using the Site Wizard

Define Menu Bar Properties for a Portal Site

About Portal Action Catalogs

Use Action Catalogs in a CSM Portal so customers can select services from a Service Catalog.

When a customer selects a hyperlink, an Action executes (example: Request Account creates an Incident record and categorizes it as a Request). The Action Catalog's theme, such as Cherwell Next, controls the fonts, colors, and block layout.

Note: A Service Catalog is built using the Action Catalog widget, which can be used on a dashboard or as a standalone widget in the CSM Portal.

Related concepts

Create an Action Catalog Widget

About Portal Calendars

The CSM Portal has calendar capabilities that are very similar to those in the Browser Client calendar.

A calendar allows you to view time-sensitive Business Object data in a natural format that can be shared with teams or an organization.

Examples of Portal calendars include the IT Calendar, Task Calendar, and Event Calendar.

When working with calendars In the Portal, users can:

- View a calendar by selecting IT Calendar on the menu bar.
- Change the Calendar View.

In the Portal, calendar functionality is accessed by selecting **IT Calendars** on the portal menu bar if you designed the Portal to include it.

Related concepts

Change the Calendar View

Design a Portal

About Portal Dashboards

A Portal dashboard is a custom, interactive, and insightful console that is optimized to provide helpful at-a-glance self-service information and navigation for customers accessing a Portal site.

Like all CSM dashboards, a Portal dashboard uses configurable widgets to display critical metrics, analyze and predict trends, drill down into data, initiate commands and Actions, facilitate navigation, or show a sampling of information relevant to customers.

Examples of Portal dashboards include:

- A not logged-in Portal dashboard, intended for anonymous customers, that presents general information and data, such as a welcome information, a community announcement board, and service desk hours.
- A logged-in Portal dashboard, intended for logged-in customers, that displays a list of open records (by customer and organization), facilitates navigation, and helps customers with self-service operations (example: Logging Incidents, locating Knowledge Articles and FAQs).
- A department dashboard, intended for customers in a specific department (example: HR, Facilities, Finance), that presents department-specific records and metrics, an announcement board, or a Twitter Feed.

CSM provides several Portal dashboards, which are used with the OOTB Portal site(s). Use these dashboards as provided, modify them, or create new dashboards using the Dashboard Manager and Dashboard Editor.

Related concepts

Dashboards

About Widgets

OOTB IT Portal Site

Dashboards

Widgets

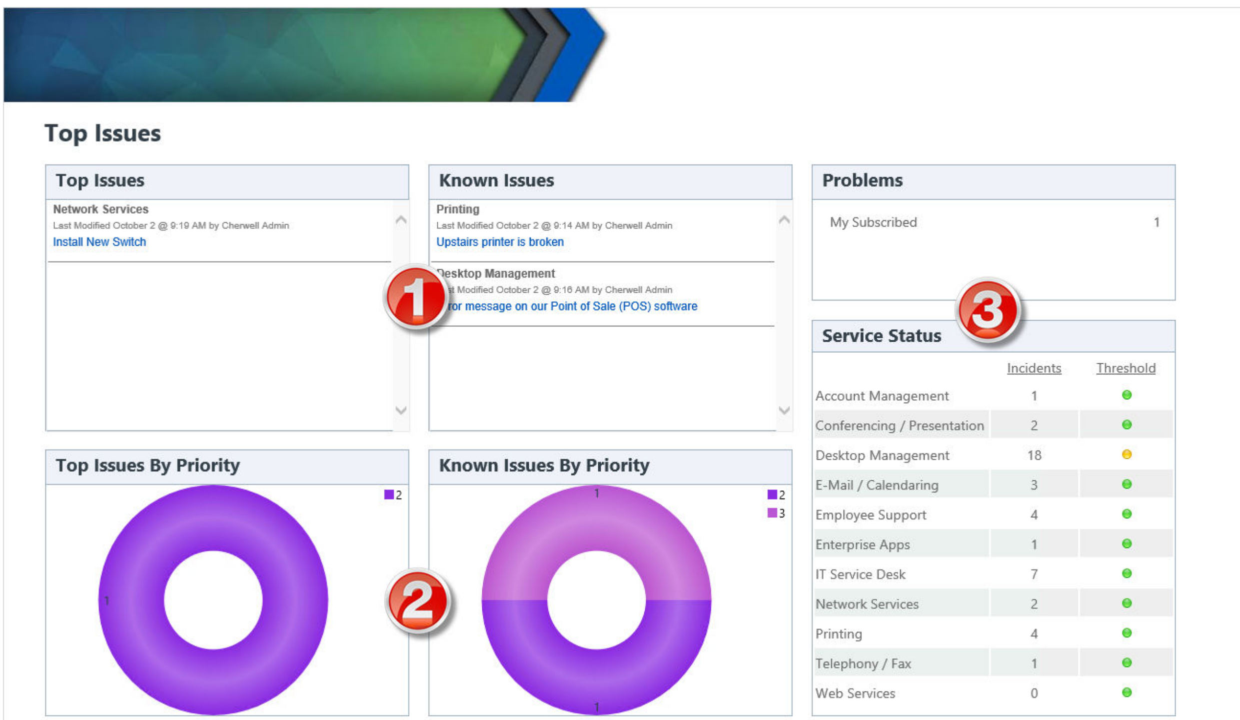
About Portal Widgets

Use widgets on a Portal to display information for customers to see.

A widget is a mechanism that displays information about a dashboard or Portal site (example: Chart, gauge, button). Examples of Portal widgets include:

1. Search Results List widget
2. Chart widget
3. Action widgets (links or commands)

CSM provides multiple widgets designed to display data on a dashboard or Portal site. Use these widgets as provided, edit them, or create your own using the Widget Manager.



Related concepts

Dashboards

Portal Sites

Managing Widgets

About Portal Forms

CSM allows you to create several different types of Portal forms for each Business Object.

Portal forms are regular forms designed specifically for the Customer Portal to provide self-service record logging capabilities, such as an abbreviated Incident form. Typically, Portal forms are much simpler than the default form used in the Desktop/Browser Client.

Regular forms are main forms or forms for the Business Object. By default, each Business Object has one *Default* regular form; however, you can create as many as you need. Typically, a regular form is intended for detailed logging activities in the Desktop and Browser Client.

Related concepts

About Customer Portals

About Forms

About Portal Grids

Grids in the Browser Client and Portal look very similar to Desktop Client grids.

Portal grids include the following features:

- **Grid Menu Bar:** Displays actions available for the grid, including navigation, Actions, and available columns.
- **Title:** Grid title that may or may not match the name of the Business Object that the grid represents. Also, a Business Object might have multiple grids, so each may have its own name.
- **Sort icon:** Indicates the column currently sorting the grid, and if it is in ascending or descending order. Select the icon to toggle sorting. Select another column heading to sort by that column.
- **Filter icon:** Indicates the column data can be filtered. Select the icon to show filtering options (possible filter values appear in the column's Filter drop-down list).
- **Grid item:** Each item within a grid contains its own line of information. Selecting the item opens the record in the **Main Pane**.

About HTML Pages

CSM provides several HTML pages.

A CSM HTML page is an HTML-coded web-like page used to display information on a CSM Customer Portal Site or in the CSM Browser Client.

HTML pages can be:

- **Internal HTML pages:** HTML pages that users design and code. Users can insert CSM commands directly into the page, as well as CSM images, tokens, and stored values.
- **External HTML pages:** Existing websites; users supply the URL.

Use an HTML page to display:

- A company website as a Startup Item on a Portal site.
- A hardware website or forum on a Portal site (add an Action to a site menu bar to display an HTML page).
- A hard-coded HTML page that users design directly in the Browser Client.

Use these supplied HTML pages as-is, edit them, or create new HTML pages using the HTML Page Manager. CSM also provides the HTML Page Editor to help design and code your own internal HTML page.

Note: The HTML Page Editor is useful for building pages. For more advanced options, it is assumed that users have a working knowledge of HTML and possibly CSS.

Related concepts

About Portal Actions

Related tasks

HTML Page Editor

About Portal Knowledge

CSM consolidates multiple knowledge sources into a single, powerful knowledge base so that users can find relevant information quickly without the use of additional resources.

Depending on the configuration of your system, customers might also have access to knowledge through the Portal so that they can independently solve issues.

CSM Knowledge can come from many different knowledge sources, including:

- **Knowledge Articles (KAs):** CSM Business Object dedicated to knowledge. Use to share identified solutions with users and customers. Note that KAs can also be imported from third-party knowledge providers.
- **Business Object records:** Closed Incidents or Problems (Known Errors), or any other appropriate Business Objects.
- **Attachments:** Imported internal or external documentation.
- **Web:** Adobe®, Google®, Microsoft TechNet®, Twitter®, Yahoo!®, and YouTube®.

By default, only members of the Portal Workgroup Manager Security Group can create Knowledge Articles in the Portal.

In the Portal, customers can search for Knowledge Articles using a Portal site's configured search control or using the Knowledge Article dashboard. When on a KA in the Portal, customers can vote on article popularity by selecting the **Like this Article** link, note whether or not it resolved their issue by selecting **Yes** or **No**, and add feedback by selecting the **Add Comment** link.

Related concepts

Knowledge Articles

About Security Groups

Navigate CSM Portal Knowledge Articles

Related tasks

Create a Knowledge Article in the Portal

About Portal Reports

Portal reports behave similarly to reports in the Browser Client.

In the Portal, reports can be run from specific links and widgets in a dashboard (if configured in CSM Administrator).

About Portal Searching

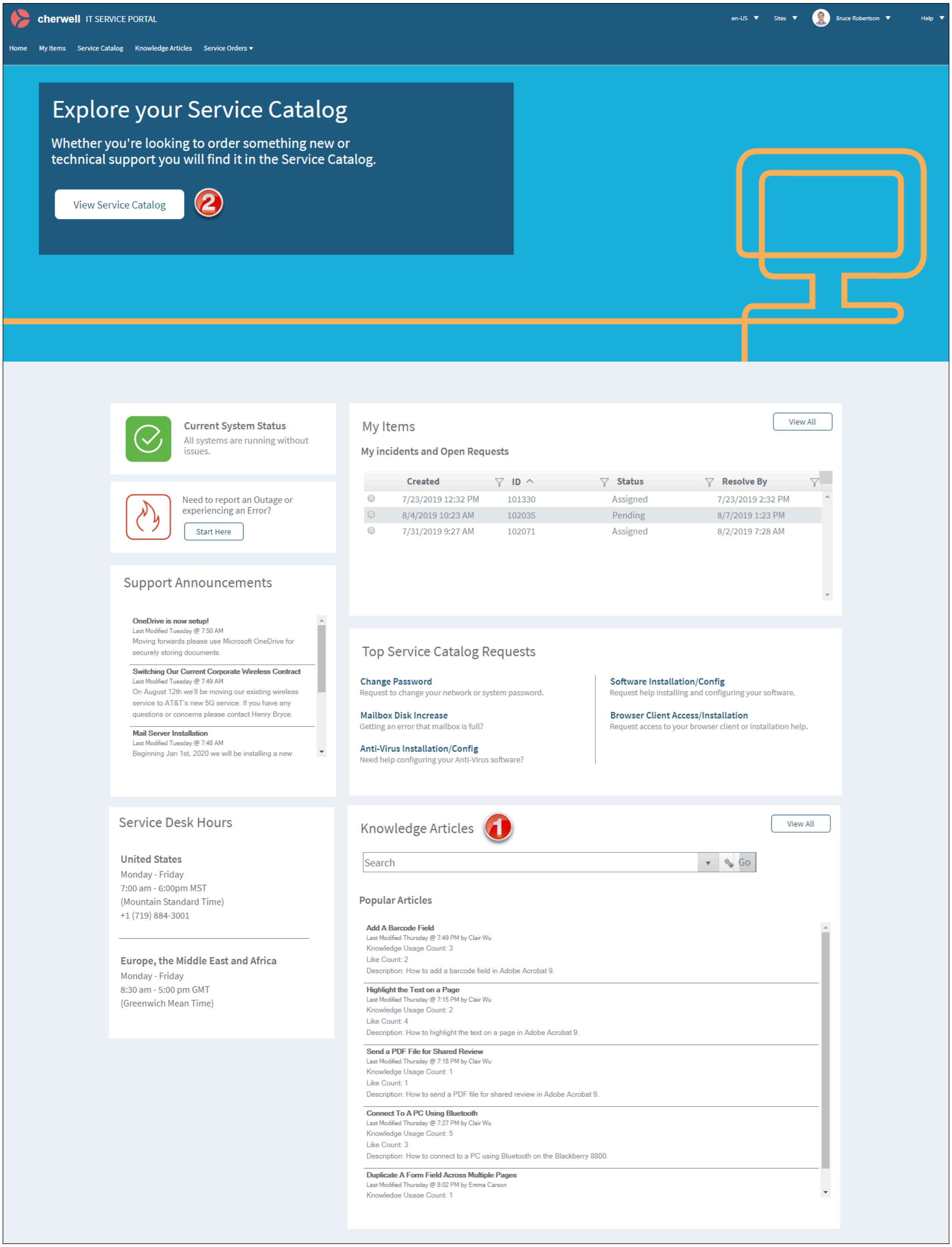
CSM provides multiple search tools to help efficiently and thoroughly search and filter CSM data, locating one record or a set or records.

Search tools for the Portal include:

1. **Knowledge Search:** A knowledge search is a search that runs against the Cherwell knowledge base to quickly find solutions. Knowledge searches can also treat existing records in CSM as knowledge sources. Search results display according to their **Relevancy** ranking, which means the records most likely to be relevant to your search string display at the top of the results. On the OOTB IT Portal site, the Find Help dashboard contains an Action link that opens the IT Portal Site Knowledge Article dashboard. This dashboard displays a knowledge search bar as well as the Featured and Most Popular Knowledge Articles.

   Tip: To use a simpler search bar in your portal, see **Render Mode** in Create a Search Widget.

2. **View Service Catalog:** Selecting **View Service Catalog** takes you to the Service Catalog where you can run a search.


cherwell IT SERVICE PORTAL
Home
My Items
Service Catalog
Knowledge Articles
Service Orders
Help
Explore your Service Catalog
Whether you're looking to order something new or technical support you will find it in the Service Catalog.
View Service Catalog
2
Current System Status
All systems are running without issues.
Need to report an Outage or experiencing an Error?
Start Here
Support Announcements
OneDrive is now setup!
Moving forwards please use Microsoft OneDrive for securely storing documents.
Switching Our Current Corporate Wireless Contract
On August 12th we'll be moving our existing wireless service to AT&T's new 5G service. If you have any questions or concerns please contact Henry Bryce.
Mail Server Installation
Beginning Jan 1st, 2020 we will be installing a new
My Items
View All
My incidents and Open Requests
Created
ID
Status
Resolve By
7/23/2019 12:32 PM
101330
Assigned
7/23/2019 2:32 PM
8/4/2019 10:23 AM
102035
Pending
8/7/2019 1:23 PM
7/31/2019 9:27 AM
102071
Assigned
8/2/2019 7:28 AM
Top Service Catalog Requests
Change Password
Request to change your network or system password.
Software Installation/Config
Request help installing and configuring your software.
Mailbox Disk Increase
Getting an error that mailbox is full?
Browser Client Access/Installation
Request access to your browser client or installation help.
Anti-Virus Installation/Config
Need help configuring your Anti-Virus software?
Service Desk Hours
United States
Monday - Friday
7:00 am - 6:00pm MST
(Mountain Standard Time)
+1 (719) 884-3001
Europe, the Middle East and Africa
Monday - Friday
8:30 am - 5:00 pm GMT
(Greenwich Mean Time)
Knowledge Articles
1
View All
Search
Go
Popular Articles
Add A Barcode Field
Knowledge Usage Count: 3
Like Count: 2
Description: How to add a barcode field in Adobe Acrobat 9.
Highlight the Text on a Page
Knowledge Usage Count: 2
Like Count: 4
Description: How to highlight the text on a page in Adobe Acrobat 9.
Send a PDF File for Shared Review
Knowledge Usage Count: 1
Like Count: 1
Description: How to send a PDF file for shared review in Adobe Acrobat 9.
Connect To A PC Using Bluetooth
Knowledge Usage Count: 5
Like Count: 3
Description: How to connect to a PC using Bluetooth on the Blackberry 8800.
Duplicate A Form Field Across Multiple Pages

Related concepts

About Knowledge Management

OOTB IT Portal Site

Create a Search Widget

About the Service Catalog

The OOTB Service Catalog displays service catalog items with an icon (optional), title, and description in card format.

Service catalogs can include:

- **Account Management:** Pertains to network access and passwords.
- **Conferencing/Presentation:** Encompasses conference setup, web sharing, projectors, and more.
- **Desktop Management:** Covers end-user computer equipment and OS, anti-virus, and miscellaneous software.
- **E-mail/Calendaring:** Contains email and calendaring software and account management.
- **Employee Support:** Used primarily by HR and hiring managers to set up new employees, update their information, or request an employee separation task.
- **Enterprise Apps:** Contains options for business software used by the organization.
- **IT Service Desk:** Used primarily by an IT department to manage technology systems in the organization.
- **Network Services:** Covers the network itself, both wired and wireless. It includes file sharing and backup/restore services.
- **Printing:** Covers local desktop and shared network printers. Users can request access to network resources, request toner/ink, or request a local printer of their own, pending approval.
- **Telephony/Fax:** Covers telephony equipment (desktop and mobile) and fax machines.
- **Web Services:** Includes external (Internet) and internal (Intranet) requests.

The OOTB Service Catalog has a search feature that produces a list of suggested matches after typing three characters into the search box. You can search on the title and description of Service Catalog items. The drop-down list of suggested results shows up to five suggestions. Select the **More** link to view additional suggestions. Select the **Search** button or press **Enter** to view all search results.

The Cards with Search style was introduced to the OOTB Service Catalog in CSM 9.2.0. If you upgraded from a version of CSM after 9.2.0, you can implement the Cards with Search or Cards with Search v2 styling.

The number of columns adjust according to the size of the user's screen. When a user's screen size is small enough that only one column of cards is displayed, the card icon will be hidden.

Figure 1. Cards with Search

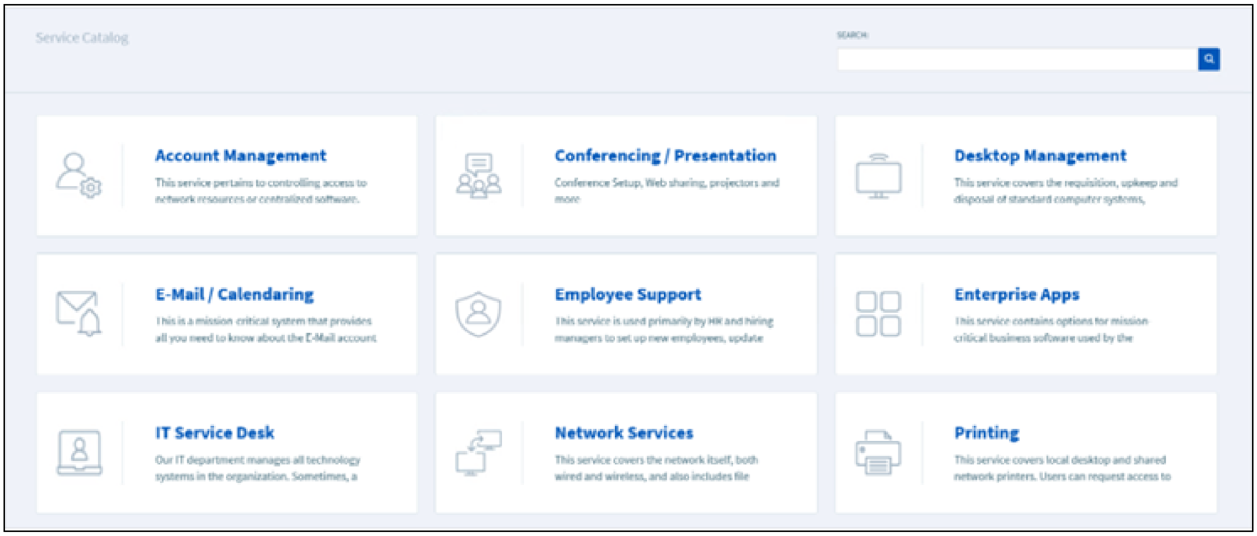
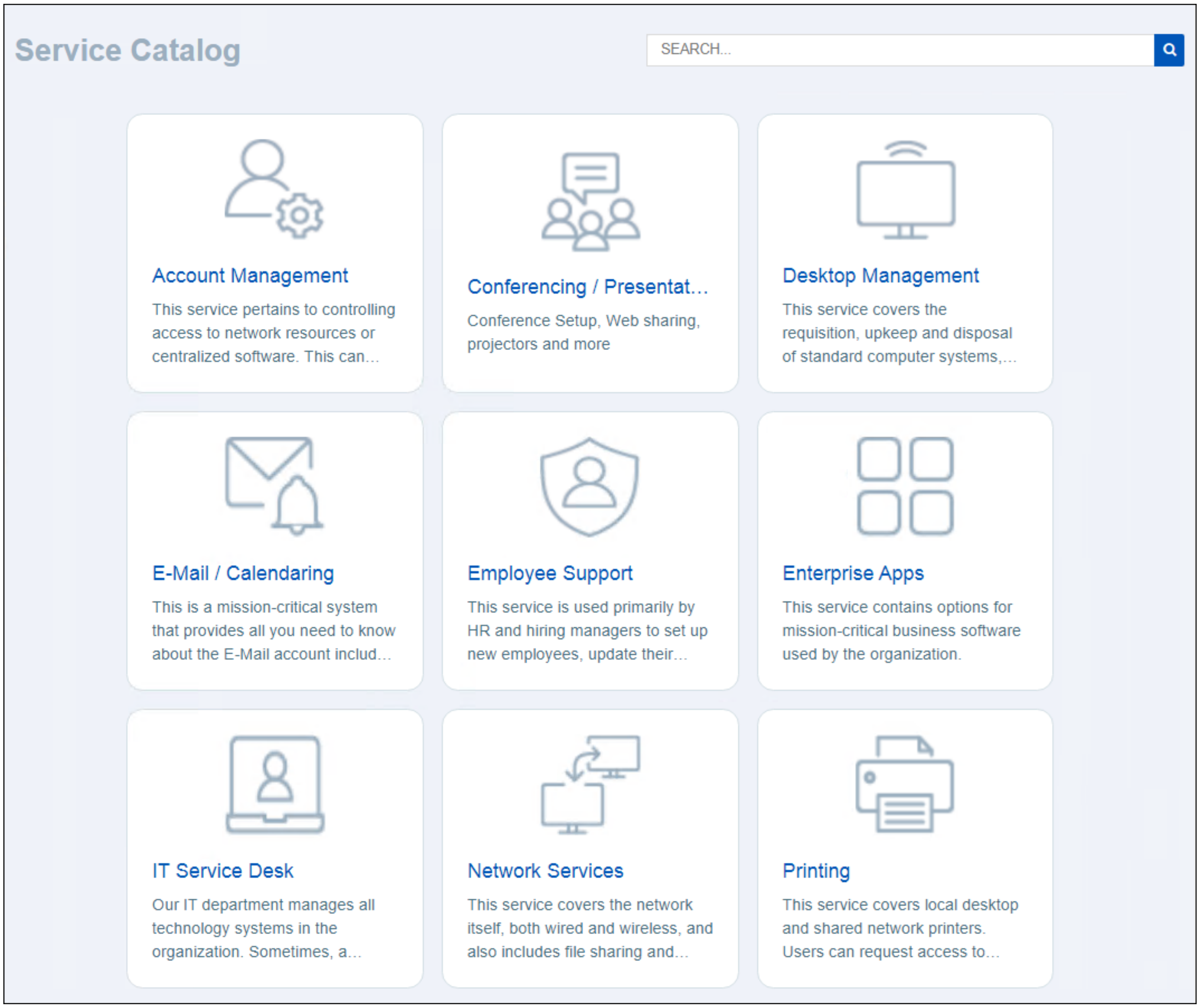


Figure 2. Cards with Search v2



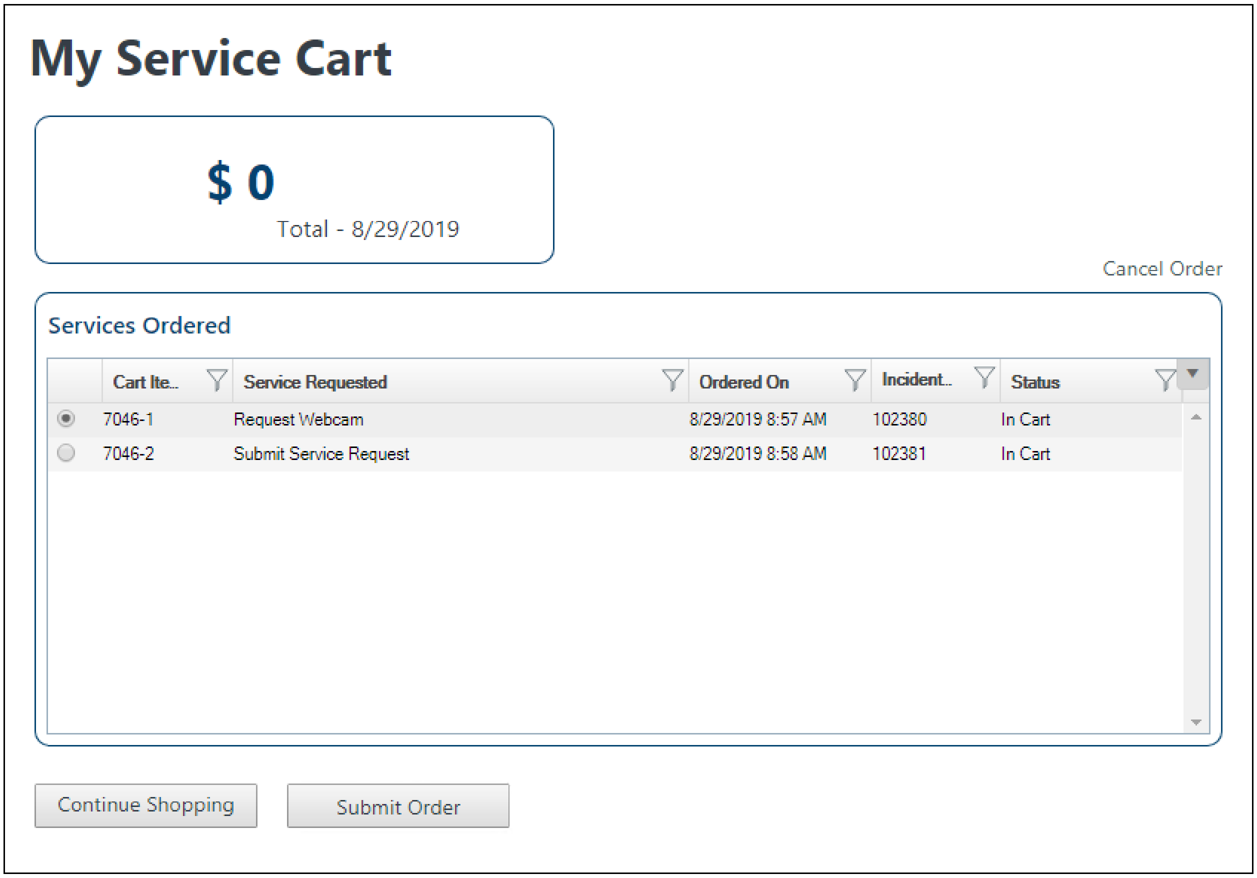
Related concepts

Supplied Service Catalog and Cards with Search Styling

About Service Carts

CSM provides a service cart as a Major Business Object for customers to use in the supplied IT Portal.

A service cart is an e-commerce tool that allows customers to add multiple Service Requests to a single order, and then temporarily hold the items until they are ready to submit the full order. When the order is submitted, each Service Request automatically creates associated Tasks based on related Service Catalog Template Work Units. Technicians fulfill the Service Requests in CSM, and customers view and track the Service Requests (and Service Request history) on the **My Service Orders** page of the Customer Portal.



Note: Service Cart can be used to support Multi-Sourcing Service Integration (MSI) and Service Integration and Management (SIAM).

Related concepts

OOTB IT Portal Site

About Portal Visualizations

Portal visualizations look and behave similarly to visualizations in the Browser Client.

A visualization is an interactive graphical representation of related data, represented as a relationship chain with colored nodes (boxes) and links (arrows). Defined alerts can also be added to indicate potential risk. Examples include:

- Configuration maps (records that are linked using a common factor)
- Organization charts

In the Portal, users can:

- View a visualization using the **Visualization** button on the menu bar.

  Note: In order to open the visualization in the Portal, the visualization feature must be added to one of the supplied Portal Site menu bars.

Good to know:

- Actions, dashboards, visualizations, calendars, widgets, and searches can be viewed, accessed, or run in the CSM Portal; however, they are managed (created, edited, and deleted) and configured (security rights and defaults) only in the CSM Desktop Client and CSM Administrator.
- The **Portal Visualization** window provides much of the same functionality as the **Desktop Visualization** window and includes the toolbar, Main pane, Aerial pane, and Legend; however, the **Portal Visualization** window does not include a menu bar.

Related concepts

The Relationship between CSM and SIAM

Related tasks

Define Menu Bar Properties for a Portal Site

OOTB IT Portal Site

CSM comes with an OOTB IT Portal site, complete with Portal-specific forms and dashboards.

The site is built using OOTB site items and predefined properties (below). If you want to implement ITSM, you can implement this site so that you can explore the features, and then modify it or create new sites to meet the needs of your organization. OOTB site items include:

- **Home Dashboard:** Directs customers to log and/or view Incidents and Service Requests, find help by browsing Knowledge Articles and FAQs, and manage their devices through Service Requests. Also displays live metrics (global and personal) and a live announcement board.

  Note: CSM also provides a not logged-in dashboard for anonymous customers. This dashboard is simple and provides access to only a few self-service operations (example: Resetting a password).

- **Service Catalog:** Displays all available services in a dynamic card format.
- **Metrics:** Displays detailed metrics for the customer (My Items), department (Department Items), and records (Status and Problems). Metrics are displayed by using dashboards.
- **Portal-specific Incident, Change Request, and Knowledge Article Forms:** Simple forms help customers log and manage their own records.

OOTB IT Portal Site properties include:

- **General properties:** Defines the name (*IT*) and associated document repository (*Default Portal Documents*).
- **Display properties:** Defines the Startup Item to display when first accessed (a dashboard named *Portal (not logged in)*) and the alternate Startup dashboard to display upon login (*Portal Default*). Also defines the theme and search control.
- **Banner properties:** Defines the title and subtitle, as well as the colors.
- **Footer properties:** No footer is used.
- **Menu bar properties:** Defines which items to display on the menu bar (Home, Service Catalog, My Devices, IT calendar, charts and items, and Service Orders).
  - **Reset Password** is a conditional menu item that only displays when the Portal (not logged in) dashboard is active.
  - The **BeyondTrust Chat Request** menu item is also conditional and displays only when BeyondTrust is enabled.
  - Service Orders is conditional and only displays when the **Service Cart Enabled Stored Value** is set to **True**. This value must be set for each language.
- **Localization properties:** Translated sites are available for Spanish, French, German, and Brazilian Portuguese. You can override certain properties for each translated site.

Related concepts

Implement a Portal

Create a Custom Portal

Navigate the CSM Portal Site Announcement Board

About the Service Catalog

Related tasks

Define Localization Properties for a Site

CSM Portal Good to Know

Use these tips for helpful information on the CSM Portal.

- The CSM Portal is personal (you can display different views for different customers).
- The CSM Portal allows anonymous access (customer is not required to log in), though access to data is limited.
- If a CSM Portal site requires a log in, customers must have CSM Portal login credentials, which means they must have a customer record with defined credentials and security rights.
- Content can be real time or static and is organized using a set of highly configurable sites that you create for your customers.
- A CSM Portal site can contain any number of site items, including Business Objects/records (customers can create and edit records), Actions (including powerful create options and interactive One-Step Actions), Action Catalogs, dashboard and widgets, document repositories, HTML pages, reports, search groups, and searching.
- When a customer first accesses a site, a default Startup Item is displayed; this can be an Action Catalog (special widget), dashboard, document repository, HTML page, report, or saved search (used to display a list of records). A customer can access other site items using the Site menu bar.
- To help you get started, CSM provides a IT CSM Portal site. This site is built using supplied site items (example: A Service Catalog, Portal-specific forms, service desk-specific dashboards, a document repository) and predefined properties (Startup Item, alternate Startup Item, header/footer, menu bar). Implement and use this IT CSM Portal site as provided, tailor it, or create new sites to meet the needs of your organization. For more information, see Portal Site Design Ideas and Create a Custom Portal.
- You may see random characters in a CSM Portal page's URL. These are related to query strings and are normal behavior.
- Security rights control access to CSM functionality and are configured in the Security Group Manager in CSM Administrator (**Security > Edit Security Groups**). For more information, see Security rights and Configure Portal Security Rights.

Related concepts

Add Customers to the CSM Portal

Portal Sites

Site Items

Document Repositories

OOTB IT Portal Site

Use a CSM Portal

Use the CSM Portal to access services provided by your company.

Portals are highly configurable, so each company typically has a unique CSM Portal. For assistance using your CSM Portal, contact your CSM administrator or read the information in this section.

Related concepts

Define Display Properties for a Site

Log in to a CSM Portal

The CSM Portal can be configured so customers and users do not need to log in, but functionality is limited until a login is complete.

To log in to a CSM Portal:

1. Navigate to https://server/CherwellPortal, where *server* is the location where CSM Web Applications are installed.
   This opens the default site chosen by your administrator.

   Tip: To navigate to a specific site, specify the site in the URL (example: https://server/CherwellPortal/Marketing).

2. Depending on the design of the CSM Portal, you may need to select the **Login** link. Consider that not all Portals and sites require login.
3. Provide your user name and password. If Windows/LDAP authentication is enabled, provide your Windows credentials.
4. Select **Login**.

Navigate to a Site

Navigate directly to a site or use the Site Selector.

If a CSM Portal contains multiple sites, site options display in the Site Selector, which is located on the application bar. The list of sites varies depending on whether or not you are logged in, which sites your system administrator has chosen to expose using the Site Selector, and your security rights.

You can also navigate to a site directly by name using the URL https://server/CherwellPortal/SiteName, where *server* is the server where the CSM Web Applications are installed and *SiteName* is the name of the site you want to visit. If you enter an invalid value or you omit the site name, you are taken to the default site.

Log a CSM Portal Record

The CSM Portal allows you to easily log records using the Service Catalog.

The types of records you can log depend on your CSM Portal. Examples include:

- **Incident**: An Incident is an unplanned interruption to a Service or a reduction in the quality of a Service (example: Something is not working).
- **Request**: A Service Request is a request for information, advice, a Standard Change, or access to a Service (example: Installation of new software). The Request form may contain different fields depending upon the type of service requested (example: New Device vs. Network Request).

In the supplied IT CSM Portal, Incidents and Service Requests (often called Requests) are stored together in the Incident Business Object. The Categorization (Service/Category/Subcategory) identifies the record as either an Incident or Request and is decided by the service chosen in the Service Catalog. You can also log an Incident or Request using the **Affects Me Too** link on a Problem logged by another customer or user.

Related concepts

Affects Me Too

Log a CSM Portal Incident

In the supplied IT CSM Portal, log an Incident from either the Service Catalog or a Configuration Item form. You can log a Service Request directly from the Service Catalog.

To log an Incident or Request from the Service Catalog:

1. In the **Service Catalog**, select a title that is appropriate for your request. For example, select **IT Service Desk**.
2. Select a tile that is appropriate for your request, and then select a link to submit a record. For example, select **Report Outage or Error**, and then select **Submit Incident**.
3. Complete the Incident form.

   Note: To submit an Incident on behalf of another person, select the **Submit on behalf of another user** check box.

4. Select **Submit**.

   A window opens to notify you of the Incident ID number.

5. View the new Incident or Request from the **My Items** section.

Remember: When you use the *Submit on behalf of* feature, you are the requester and the person you're submitting the Incident for is the Incident owner. The Incident owner is the only one who can edit or add attachments to the Incident. Ensure requesters understand this restriction so they can include all relevant information prior to submitting the Incident.

Related concepts

About Rich Text

Affects Me Too

Affects Me Too functionality is a way to log an Incident or Request that links to a similar, pre-existing Problem in the OOTB IT CSM Portal.

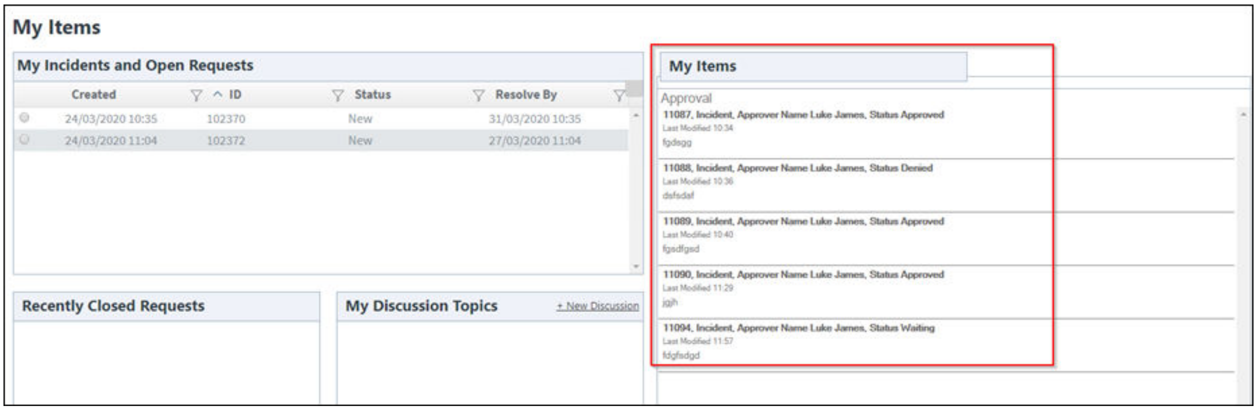
When the **Affects Me Too** link displays on a Problem, a new Incident or Request can be created with a unique ID number simply by selecting the link.

Approve a Request in the CSM Portal

Use the CSM Portal to approve requests, for example, for Incidents and Changes.

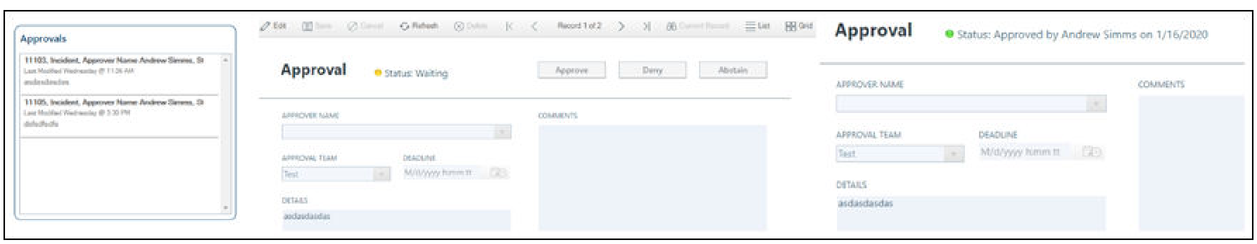
Important: Editing, responding to, or progressing, an approval in the Portal does *not* consume a CSM license.

If your system has been configured as described in Configure Customers Approvals for the CSM Portal, a customer can see approvals in the approvals widget on the **My Items** dashboard.



This applies to approvals created using an approval block or created manually. For more information on manual approvals, see Configure Customer Approvals

A customer can then navigate through the workflow for that item and approve, deny, or abstain the approval record.



Related concepts

About Approvals

About Delegation

Add an Approval to a Business Object

Approval Form

Navigate the CSM Portal Site Announcement Board

The Portal Announcement Board provides a collaborative environment for customers to share information in real time.

The announcement board can be customized using the Widget Manager.

On the Portal Announcement Board, users can view an announcement topic.

Related concepts

Managing Widgets

Related tasks

View an Announcement Topic

View an Announcement Topic

View an announcement topic in the supplied Portal Announcement Board.

To view an announcement on the announcement board:

On the home page, select an announcement link from the **Support Announcements** section.
The announcement topic opens.

You can:

- View the message (a more detailed explanation of the problem/concern/announcement).
- Read the responses from other customers and users.
- Add a comment.
- See who posted the announcement.

Related tasks
Add a Comment

Add a Comment

Add a comment to an announcement topic in the supplied CSM Portal to share additional information.

To add a comment from the announcement topic page:

1. Open an existing announcement topic.
2. Select **Add a Comment**.
   The **Comment** prompt opens.
3. Provide a comment.
4. Select **OK**.

Navigate CSM Portal Knowledge Articles

Customers and users can access Knowledge Articles in the supplied Portal to help solve issues without having to log Incidents.

Find Knowledge Articles in the CSM Portal:

- Using the **Search Knowledge Articles** control.
- Using the Knowledge Article dashboard. Open the dashboard by selecting **Knowledge Articles** on the menu bar.

From a Knowledge Article, users can:

- Read article content.
- Allow users and other customers to know if an article resolved your issue:
  - Select **Yes** if the article helped.
  - Select **No** if the article did not help. The Incident is logged and a new window opens with the Incident ID.
- Add a comment by selecting the **Add Comment** link.

  View or hide comments using the vertical splitter bar.
- Vote on the Knowledge Article by selecting the **Like this Article** link to let other customers and users know that the article was helpful or informative.

Related concepts

CSM Desktop Client Quick Search Widget
Resize Forms Using Splitters

Create a Knowledge Article in the Portal

By default, only members of the Portal Workgroup Manager Security Group have the rights to create new Knowledge Articles in the CSM Portal.

To create a new Knowledge Article in the Portal:

1. In the supplied IT Portal site, open the Knowledge Article dashboard by selecting **Knowledge Articles** on the menu bar.
2. Select **Create a Knowledge Article** in the **Search Knowledge Articles** section.
3. Select an **Article Type**.
4. Provide a title and the article content.
5. Select **Save**.

Related concepts

About Security Groups

External Portal Sites

View Knowledge Articles as Anonymous User

If enabled, anonymous users can view knowledge articles to help solve issues without having to log in to the CSM Portal.

To view knowledge articles as an anonymous user in the OOTB Portal:

1. Open a browser and navigate to the CSM Portal home page, and then navigate to the **Knowledge Articles** section.
2. In the **Search** field, type one or more keyword(s) related to a knowledge article you want to view and select **Enter**.
3. In the search results, select the link to the knowledge article you want to view.

Note: Anonymous users can only view records. You must log in to interact with or edit records in the Portal.

Design a Portal

Useful tips and consideration when designing a Portal.

Portal design is important. Before creating a Portal:

- Answer questions about audience, scope, and purpose.
- Review Portal design tips.
- Consider how CSM features, such as Security and site items play into design.
- Optional: Start with the supplied IT Portal Site for design ideas.

Related concepts

Portal Design Worksheet
Portal Design Tips
Portal Design Considerations
Portal Site Design Ideas

Portal Design Worksheet

Use the Portal design worksheet to assist you in creating a Portal.

Before creating a Portal, you should ask yourself some basic questions to help drive the design.

	Question	Consideration
1.	**Who is your audience (in other words, who are your customers)?**	
a.	Are your customers internal employees? External? Both?	• Portal login credentials. • Anonymous login/Security Groups.
b.	Are your customers experienced? IT personnel who can complete tasks by themselves? Novice customers who need guidance? Both?	• Number of sites (single site or one for each expertise level). • Site item and navigation design (simple or sophisticated). • Portal Views (personalize and secure what customers see). • Automation (Add One-Step Actions/Actions to simplify tasks). **Tip:** Expose customers only to the information they need.
c.	Do your customers have different interests (different teams/different responsibilities (example: General Status for Managers, Requesters of IT.)	
d.	Are your customers international?	• Localization.
2.	**What will your customers need to do in the Portal?**	
a.	Will your customers view/ monitor data (reports, dashboards)? Interact with data (Action Catalog/create Incident or Service Request)? Both?	• Add data-driven site items (reports, dashboards, document repositories) or action-driven site items (Actions to create/ edit records, run One-Step Actions, launch CSM Managers). • Security groups/Security rights (View, Create, Delete). • Record ownership. • License consumption.
b	What activities do your customers need on a site (example: run a report, create an Incident, access documents (doc repository)?	• Create site items that deliver what customers need most. • Make information easy to find (Startup Item should be informative).

	Question	Consideration
c.	Will your customers need searching capabilities?	• Display a search control. • Display Saved searches to automate common searches. • Add an Action to display the Search Manager (allows custom Searches).
d.	Will your customers need to access documents?	• Display a document repository.
e.	Will your customers need to access other websites?	• Display an external HTML page or an external site.
3.	**Will your customers need access to data other than their own?**	
a.	Will your customers need to view/edit other customers' records?	• Record ownership. • License consumption.
4.	**Will different customers need different security?**	
a.	Will you allow customers to access data without logging in?	• Anonymous login/Security Groups. • Different Startup Items for logged-in/anonymous customers.
b.	Will you *require* a login?	• Customers will need Portal login credentials.
c.	Will some customers need view-only rights? Will some need edit rights?	• Anonymous login/Security Groups. **Note:** For more information about considerations and some helpful design tips, see Portal design considerations and Portal design tips. For more information about Security (security groups, license consumption, scope) refer to the Security documentation. For more information about site items (including how to create each), see their respective documentation.

Related concepts

Add Customers to the CSM Portal

Anonymous Security Group

Site Items

Portal License Consumption

Record Ownership

Portal Design Tips

Use the Portal design tips for useful information and recommendations.

The following are some tips to help design a Portal that meets the needs of your Service Desk and your customers for any department:

- **Make it easy to find:** Layout and navigation are important. Strategically place important information or commonly-accessed services in obvious places. Use tables, bullets, columns, and headings to elegantly organize information into logical and clearly-labeled groupings. Enhance navigation by using an intuitive menu bar, Actions, and links.
- **Make it easy to use:** Keep it simple. Simplify forms and Service Catalogs so that customers are only exposed to the information they need. Use customer-friendly language so that customers feel comfortable with the content. Automate common tasks using One-Step Actions/Actions and templates.
- **Make it personal:** The Portal is highly customizable so make each customer's experience relevant and personal. Create custom dashboards and forms, expose only relevant services and Knowledge Articles, dazzle customers with meaningful graphics, colors, and logos.
- **Make it enticing:** Do not underestimate the visual experience. Employ visual elements, such as graphics, symbols, and colors, to convey information and embellish the aesthetic. Use consistent, browser-friendly fonts and colors (or themes) to ensure stability and cohesion.
- **Make the Startup Items count:** Your Startup Items set the tone for your Portal and sites. Select an OOTB Portal Site that effectively introduces your Portal. Designate a Site Startup Item that immediately communicates the purpose of your site and provides clear access to common Actions. For example, select an Action Catalog that clearly communicate your service offerings or a dashboard that provides status, common Actions, and links.
- **Proactively share:** Post advisories and bulletins (known errors, outages, and solutions) to help avoid potential issues. Set expectations by communicating your services and policies to avoid confusion and misunderstandings.

Portal Design Considerations

Use these tips when designing a Portal.

- **Customer Security Groups:** Users (Service Desk professionals working in CSM) and customers (end-users using the CSM Portal to conduct self-service activities) perform different functions in CSM and, therefore, require different security.
- **Security rights:** Security rights control access to CSM *functionality* and *data*. For example, to create a dashboard, you must have security rights to access the Dashboard Manager (functionality). To view, add, edit, or delete the Description field in an Incident record, you must have security rights to access the Incident Business Object and the Description field (data). For more information, see Security rights.
- **Anonymous Access (allow customers to access Portal data without logging in):** CSM provides an Anonymous Security Group for customers who need to access the Portal without logging in. The Portal Client uses this Anonymous Security Group to define security rights for those anonymous customers.
- **Portal Views:** Use a Portal form view to create customer-specific versions of your forms. A Portal view allows you to expose data to customers in a more secure and customer-friendly way.
- **Record ownership:** Access to records is controlled through record ownership. Typically, customers own and can access their own records. However, record ownership rights can be extended to managers, workgroups, and Workgroup managers so that customers can update records that are owned by another customer.
- **License consumption:** Customers can view, create, and edit their own records without consuming a license. With security rights, a customer can also view, and in some cases, edit (through a One-Step Action) another customer's records without consuming a license. For more information, see Portal license consumption.
- **Site scope:** CSM provides a site scope, which allows you to limit CSM Items (dashboards, reports, One-Step Actions) to a specific Portal site.
- **Startup Site Items:** Each site has a designated Startup Item (example: a dashboard) which is displayed by default when the site is first accessed. If desired, a different Startup Item can be displayed upon login so that information can be more securely or appropriately filtered based on credentials. For more information, see Site items.
- **External Sites:** The Portal can link to external websites using a simple link to a URL.

Related concepts

About Security

About Security Groups

Presenting Different Views to Users

Security Considerations

External Portal Sites

Portal License Consumption

A customer can view, create, and edit their own records without consuming a license.

With security rights, a customer can also view, and in some cases, use a One-Step Action to edit another customer's records without consuming a license.

CSM notifies the customer when a concurrent license is necessary. If the customer does not have rights to consume a license, they are told that they cannot edit the record.

Note: A site can be configured to always use a license. (This might be done for a management-focused site where it is assumed that all work is done against other customer's records).

Portal license consumption rules:

- A customer logging in to CSM through the Portal to view/edit their own records (they are the customer record owner, meaning they are the requester/initiator and is associated with the record) *does not* consume one of the concurrent licenses.
- A customer logging in to CSM through the Portal to access someone else's records (they are not the requester but has been granted access rights) *does not* consume a license *to view* the record but *does* consume a license *to edit* a record.
- A customer can run some One-Step Actions without consuming a license:
    - One-Step Actions Actions that do not alter data can be run without consuming a license (example: Send an email).
    - One-Step Actions Actions that do alter data can be run against records owned by the requester without consuming a license.
    - One-Step Actions Actions that alter data generally consume a license when run against a record owned by someone other than the requester. However, there are a handful of situations where a One-Step Action is allowed to change another requester's record without consuming a license:
        - **Creating a journal entry:** For example, allowing a customer to provide feedback on an Incident or Knowledge Article even if they are not an owner/requester.
        - **Rating a record:** Toggling a logical field or incrementing the count in a numeric field (example: Allowing a customer to vote on whether or not they liked a Knowledge Article). The field must be appropriately configured by the administrator to hold a rating value.

Related concepts

License Consumption

Application Security

External Portal Sites

The Portal can link to external websites using a simple URL.

This helps make all of your customer-facing sites feel more integrated because CSM and non-CSM sites show up next to each other. For example, incorporate your organization's website or a department's website into the Portal, or add a website that supports your hardware.

Note: The way your CSM Portal is accessed (via HTTPS or HTTP) affects the display of an embedded HTML page.

Related concepts

HTML Pages Good to Know

Related tasks

Create a Knowledge Article in the Portal

Portal Site Design Ideas

CSM provides an OOTB IT Portal site to get you started.

The OOTB IT Portal site is built using OOTB site items (dashboards, forms) and predefined properties (Startup item, header/footer, menu bar). You can use this Portal site as provided, or tailor it to meet the needs of your organization.

Design ideas include:

- Edit the site display for logged-in and not logged-in modes.
- Edit the banner.
- Edit display options for the footer.
- Display your organization logo in the banner and/or footer.
- Display organization Business Hours.

Related concepts

OOTB IT Portal Site

Site Items

Edit a Site

Implement a Portal

Use these steps to implement the supplied IT Portal site.

Complete the following steps to implement the supplied IT Portal site:

1. Review the Portal site. Understand the supplied site items (dashboards, the Service Catalog, the discussion board, the document repository) and the supplied properties (header/footer, menu bar).
2. Configure required Portal settings:
   a. Configure the Portal URL.
   b. Set the default domain in CSM Administrator.
   c. Create Portal login credentials for a customer. Typically, this is done as part of the security setup.

   Note: CSM provides other default settings (example: anonymous login, password enforcement rules); you can change these, if needed, but it is not required.

3. (Optional) Explore ideas for Portal site design. For more information, see Portal site design ideas.
4. (Optional) See ideas for creating a custom Portal. For more information, see Create a custom Portal.

Related concepts

OOTB IT Portal Site

About the Service Catalog

Define the Default Domain and Anonymous Login Settings

Configure Login, Authentication, and Inactivity Settings for the CSM Portal and CSM Browser Client

Related tasks

Configure CSM Web Application Settings (URLs, Timeouts, RSS Feeds)

Create a Custom Portal

You can use these options or create a Portal from scratch.

We recommend starting with this design and then customizing it to your specific needs. However, users can create a Portal from scratch, if needed.

To create a custom Portal:

1. Design the Portal (site items, navigation, security).
2. Create the site items to include on each site. Users can include the following:
   - **Business Objects and records**. For more information, see Business Objects/records.
   - **Actions.** For more information, see About Portal Actions.
   - **Action Catalogs.** For more information, see About Portal Action Catalogs.
   - **Dashboards and Widgets.** For more information, see About Portal dashboards and widgets.
   - **Document Repositories.** For more information, see About document repositories.
   - **HTML Pages.** For more information, see About HTML pages.
   - **Reports.** For more information, see About reporting.
   - **Saved Searches.** For more information, see About saved searches.
   - **Searching.** For more information, see About searching (rich searching, combined searches and results).
3. Run the Site Wizard to create one or more cursory sites: Create cursory layout and characteristics for the site (title, Business Object associations, display, and document repository association).
4. Refine/edit sites using the Site Editor and **Site Properties** window: Refine the way the site/site items look and behave. For more information, see Refine/edit a site.
5. Configure the Portal. For more information, see Configure a Portal (settings, login credentials, password enforcement rules).

Related concepts

Portal Sites

Design a Portal

Portal Site Design Ideas

Steps to Implement the OOTB IT Portal

Related tasks

Create a Site Using the Site Wizard

Build and Manage a Portal

Use the Site Manager and Site Wizard to help you build and manage a Portal.

Portals are highly configurable. When you create your Portal, you decide how many sites to create, which site displays by default, how each site looks, which site items are displayed on each site, and who can access each site/item.

To help create and manage your Portal, CSM provides the:

- **Site Manager:** Helps manage sites.
- **Site Wizard:** Walks through the steps to create a cursory site.
- **Site Editor and Site Properties window:** Help edit/refine the way site/site items look and behave.
- **CSM Item Managers:** Help manage site items, such as dashboards, HTML pages, and document repositories.

Note: Good design is important. Before creating a Portal, see our recommendations on how to design a Portal.

Related concepts

Site Manager

Design a Portal

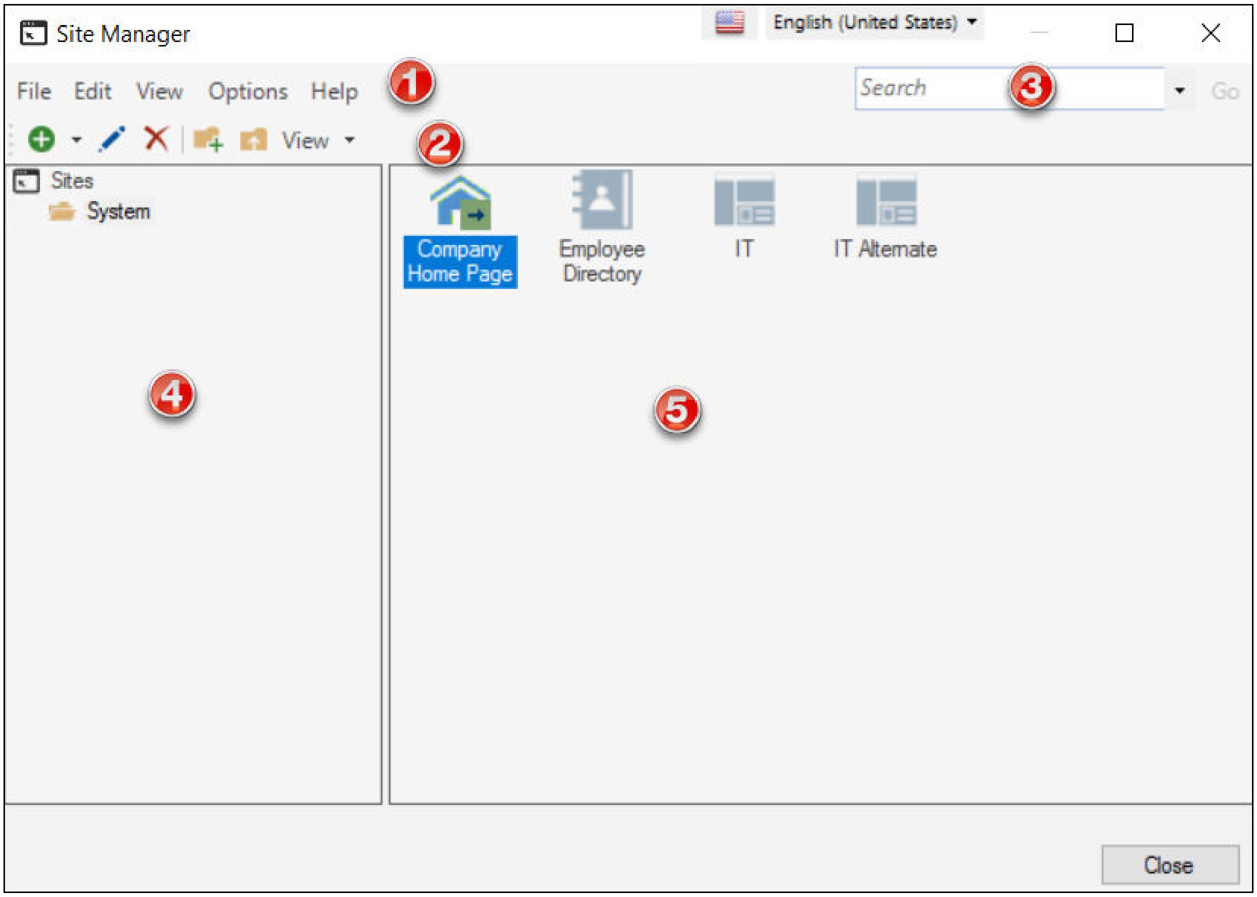
Related tasks

Create a Site Using the Site Wizard

Site Manager

Use the Site Manager to complete general CSM Item Manager operations for sites.

You can also mark a site as the default site for the Portal.



1. **Menu bar**:

   Displays a row of drop-down menus available in the Manager.

2. **Toolbar**:

   Displays a row of buttons for operations available in the Manager.

3. **Search Control**:

   Displays a search box to find specific words or phrases in the Manager.

4. **Manager tree**:

Displays items in a hierarchical tree, organized by scope, and subfolder if applicable. Also lists any searches run during the session.

5. **Main Pane**:

   Displays items by view (icon, list, or details [grid]) and lists search results when a search is run.

Related concepts

CSM Item Manager Main Window (Typical)

Open the Site Manager

Open the Site Manager from CSM Administrator.

To open the Site Manager:

- In the Blueprint or mApp Editor menu bar, select **Managers > Site Manager**.
- In the CSM Administrator main window, select **Browser and Mobile > Site Manager**.

Related concepts

Blueprint Editor Menu Bar

Create a Site

The Site Wizard helps you create a basic working Portal.

The **Site Editor/Site Properties** window helps you add refinement. You can skip refinement, if needed, or you can select **Finish** at any time in the Wizard and go straight to refining.

To create a site:

1. **Run the Site Wizard to create a cursory site:** Create cursory layout and characteristics for your site (title, Business Object associations, display, and document repository association).
2. **Refine/edit your site using the Site Editor and Site Properties window:** Refine the way your site/site items look and behave.
    a. **Define general properties for the site:** Define the name and title, login requirements, record ownership, the Business Object/record associations (which Business Objects/records the customers can interact with), and the document repository association.
    b. **Define display properties for the site:** Define appearance (color/theme), Startup Site Items, and search capabilities.
    c. **Define Banner properties for the site:** Define what the site banner looks like (background color and image, and banner image) and what text displays on it (title, subtitle, and baseline).
    d. **Define footer properties for the site:** Define what the site footer looks like (background color and image, and footer image) and what text displays on it (title, subtitle, and baseline).
    e. **Define menu properties for the site:** Define which site items display on the site menu bar, and which Actions a customer can initiate from each.
    f. **Define Localization properties for the site:** Select a default language and override options for translated sites.

Related concepts

Edit a Site

Site Items

About Portal Actions

Related tasks

Create a Site Using the Site Wizard

Create a Site Using the Site Wizard

Use the Site Wizard to walk through the steps to create a site.

To create a site using the Site Wizard:

1. Open the Site Manager.
2. Select **Create New**, and then select **Site**.

   Note: To create an external site, one that simply displays an existing website, select **External Site**. The **External Site** window opens to provide the URL and other options.

3. Select **Next**.
4. Define basic properties for the site:
   a. Specify a title for the site that displays in the banner.
   The **Name** and **Description** fields initially include text that you can refine later. The **Name** becomes part of the URL for referencing this site in a browser. The **Description** is shown in the Site Selector when customers switch between sites.
   b. Select a theme (set of fonts, colors, and options) to be used by different elements. Using a theme simplifies the cohesive look. You can change the theme at any time, which automatically updates the various elements.
   If the theme is changed, refresh the browser to view the changes.
   c. Select **Banner image** to launch the Image Manager, and then select an image to display on the site banner. You can select an existing image or import a new image.
5. Select **Next**.
6. Select the **Business Objects/records** to include on the site:

   Note: These are the Business Objects with which you want your customers to interact. For example, if you want customers to be able to view or create Incident records, select the Incident Business Object.

   a. Select **Add** to include Business Objects/records on the site.

      Tip: Use the up and down arrows to order the Business Objects on the site menu bar and to indicate the relative importance of a Business Object on the Site. select **Remove** to remove a selected Business Object from the site.

   b. Select the **Add newly associated objects to site menu** check box to automatically add the associated Business Object to the site's menu bar.

   Note: When you add a Business Object to the site's menu bar, CSM adds a Business Object menu option and some supplied Business Object Actions. For example, if you add Incident to the menu bar, CSM adds an Action to create a new Incident, as well as Actions to launch some Incident searches (My Open, Closed, and Recent Incidents). You can use these Actions, modify them, or create your own when you define the menu properties.

7. Select **Next**.
8. Select the document repository to include on the site:

   Tip: You can use multiple document repositories on a single site. Within the Site Editor, you can add an Action to display another document repository on the site menu bar.

   - Select **Create new document repository named** to create a new document repository for this site. Then, name the document repository (or leave the auto-generated name).
   - Select **Associate an existing document repository** to use an existing document repository for the site. Select the **Ellipsis** to open the Document Repository Manager, and then select an existing document repository or create a new document repository.
   - Select **Do not associate a document repository** if you do not want to use a document repository on the site.
9. Select **Next**.
10. Select a Startup Site Item from the following:
    a. Select **Dashboard** to display a dashboard on startup. Select the **Ellipsis** to open the Dashboard Manager, and then select an existing dashboard or create a new dashboard.
    b. Select **Page** to display an HTML page on startup. Select the **Ellipsis** to open the HTML Page Manager, and then select an existing HTML page (or create a new internal or external HTML page).

    Note: The way your CSM Browser Client is accessed (via HTTPS or HTTP) affects the display of an embedded HTML page. For more information, see HTML pages good to know.

    c. Select **Other** to display an Action Catalog widget, a document repository, a report, or a saved search on startup. Select the item's ellipsis to open the Action Manager, and then select an existing item.
    d. Select **The site requires the user to log** check box to require customers to log into the site. If you do not require a login, you can specify a different Startup Item for when the customer does log in.

    Note: A license is consumed when a customer logs in.
11. Select **Finish**.

Related concepts

Open the Site Manager

External Portal Sites

About Portal Actions

Action Manager

Related tasks

Define Menu Bar Properties for a Portal Site

Edit a Site

Edit a site to customize it based on your preferences.

Use the **Site Editor/Site Properties** window (both accessed from within the Site Manager) to edit a Portal site and its site items.

Related concepts

Site Manager

Portal Sites

Site Items

Define General Properties for a Site

Use the **General Properties** page to edit basic site features that may have initially been defined in the Site Wizard. Edit and customize the site title, login requirements, document repository association, and Business Object association.

To define general properties for a site:

1. Open a site in the Site Editor (**CSM Administrator > Site Manager > Portal Site Name**).
2. Select the **General** page.
3. Define general properties for the site:
    a. **Title:** Provide a title to display in the Portal UI. The site title and banner title were initially created in the Site Wizard, but can be edited here.
    b. **Description:** Provide a description to display in the Portal UI.
4. Define access options for the site:
    a. **Show in Site Selectors:** Select this check box to include the site name in the Site Selector drop-down list. The Site Selector is located on the Site Application Bar in the **Portal Main Page**.
    b. **Require login for access to site:** Select this check box to require users to login to the site.
    c. **Acquire a license at login (so editing other users' records will not require a prompt):** Select this check box to acquire a license for the user upon login.
    d. **Acquire a license on edit (suppress prompt):** Select this check box to acquire a license for the user upon editing another user's record while suppressing the prompt to acquire the license (example: A site intended for managers that are editing other user records).
5. Select Business Objects to associate with the site:
    a. Select **Add**.
    b. Select a **Business Object** from the list. Choose Business Objects for users to interact with (example: If a user needs to view or create Incident records from the site, select the **Incident Business Object**).
    c. Repeat steps A and B for all desired Business Objects.
    d. **Add newly associated objects to site menu:** Select the check box to automatically add associated Business Objects to the site's menu bar.
6. Select a document repository to include on the site.
    a. Select the **Associate an Existing Document Repository** check box.
    b. Select the **ellipsis**. The Document Repository Manager opens.
    c. Select an existing document repository or create a new document repository.
    d. Select **OK** to close the Document Repository Manager.
7. Select **Save** to close the Site Editor.

Related concepts

Document Repositories

Configure the CSM Portal Site to Allow Anonymous Access

To allow anonymous access, the CSM Portal site must be configured so that it *does not* require login.

To configure the CSM Portal site to allow anonymous access:

1. In CSM Administrator, select **Browser and Mobile > Site Manager**
2. Right-click on the site designed as your CSM Portal and select **Edit**.
3. In the **General** tab, clear the **Require login for access to site** check box.
4. Select **Save**.

Related concepts

Anonymous Security Group

Define Display Properties for a Site

Use the **Display Properties** page to specify startup site items, login options, search capabilities, browser tab images, and custom documentation. The **Display** page can also be used to further refine the site's appearance and Theme.

Define General Appearance Properties

To define appearance properties for a site:

1. In CSM Administrator, select **Site Manager** to open your CSM Portal site in the Site Editor.
2. Select **Edit**. The **Site Properties** page opens.
3. Select the **Display** page.
4. In the **Appearance** section, define the following:
   a. From the **Theme** drop-down list, select a theme to define sets of colors, styles, and fonts for the site.
   b. From the **Use Background** drop-down list, select a color to define the site's background color. For best results, use **Form Theme** as the background color.
   c. Select the **Show Site Selector on application bar** check box to display the Site Selector drop-down list on the Portal Application Bar.
   d. From the **Keep menu visible when scrolling** drop-down list, choose to keep the site menu bar visible or hidden to when user's scroll. You can also choose to keep the menu bar visible for mobile devices only.
5. Select **Save**.

Define Browser Tab Properties

To add a custom image to your site's browser tab:

1. In CSM Administrator, select **Site Manager** to open your CSM Portal site in the Site Editor.
2. Select **Edit**. The **Site Properties** page opens.
3. Select the **Display** page.
4. Select the **Use Favicon** check box.
5. Select the **ellipsis**. The **Image Manager** opens.
6. Upload a new image or choose an existing image:
   a. Select the **New** button to upload a new image (example: your company logo).

      Note: Favicon images have a size limit of 512K. An error message appears if the uploaded image is too large.

   b. Select an existing image from the Image Manager. The name of the selected image populates the Favicon field.
7. Select **Save** to close the **Site Properties** page.

Define Site Startup and Login Options

Define items that appear on site startup, as well as items that appear after a user has logged in.

The options you set on the **Display** page apply to the site's default language. You can customize startup and login actions for each site language.

To define startup options:

1. In CSM Administrator, select **Site Manager** to open your CSM Portal site in the Site Editor.
2. Select **Edit**. The **Site Properties** page opens.
3. Select the **Display** page.
4. In the **Startup** section, define the following:
   a. Select the **ellipsis** to the right of the **Show on startup** to select a **Site Item** to display when a user initially accesses the site. Site items include widgets, dashboards, reports, HTML pages, or saved searches.
   b. Select the **Show on login** check box to display a different site item when users log in. Then, select the **ellipsis** to select a site item.
   c. From the **View** drop-down list, select the view to control the behavior and appearance of Business Objects within the site. Options include:
      - **Role-based**: Based on the default role associated with the user's security group. Different users see different Business Object Forms based on security.
      - **Portal Default**: Provides the default Portal view for Business Objects within the site.
      - **Portal Secondary**: A view option for smaller, secondary sites that may supplement or support your main site.
      - **Default**: The default site view is not recommended because it also displays technician forms, which are not relevant for site users.
5. Select **Save**.

Define Login Options

Customize what users see on when they log in to the Portal site.

To define login options:

1. In CSM Administrator, select **Site Manager** to open your CSM Portal site in the Site Editor.
2. Select **Edit**. The **Site Properties** page opens.
3. Select the **Display** page.
4. Select the **Login Options** button.
5. In the **Text to display on login dialog** box, provide a custom message for users when they log in to the site.
6. Select the **Show privacy link in login dialog** check box to display a link to a privacy statement, then provide text for the link and the URL to the privacy document.

7. Select the **Custom avatar image** button to open the Image Manager, then select default images to display for a non-logged-in customer and a customer without an assigned avatar.
8. Select the **Redirect User on Logout** check box to automatically redirect customers to a specified URL when they log out of the Portal. Then, provide the URL or select the **Browse** button and select a website where customers will be redirected after logging out of the Portal.
9. Select **Save**.

Define Search Control Options

The options you set on the **Display** page apply to the site's default language. You can customize the search control for each site language.

To customize search control options:

1. In CSM Administrator, select **Site Manager** to open your CSM Portal site in the Site Editor.
2. Select **Edit**. The **Site Properties** page opens.
3. Select the **Display** page.
4. In the **Search** area, select one of the following options:
   a. **Use default**: Select this option to use the search control options that are based on the list of Associated Business Objects from the **General** page.
   b. **Use search widget**: Select this option to use a custom search widget. Select the **ellipsis** to open the Widget Manager, and then select a widget.
   c. **No search**: Select this option to omit searching from this site by removing the search control. You can still create search widgets and place them on dashboards to allow for target searching.
5. Select the **Require login before showing search results (excluding dashboards)** check box to require a user to login before performing a search. If a search is performed without requiring the user to login, the search results are based on security rights of the Anonymous Security Group.
6. Select **Save**.

Disable or Enable Custom Portal Documentation

By default, the CSM Portal links users to the default Cherwell online documentation system. Due to the highly configurable nature of the CSM Portal, a customer may choose to disable this feature or link to a custom online documentation system.

To disable default CSM Portal documentation:

1. In CSM Administrator, select **Site Manager** to open your CSM Portal site in the Site Editor.
2. Select **Edit**. The **Site Properties** page opens.
3. Select the **Display** page.
4. Clear the **Show help button** check box to remove the default help button from the CSM Portal.
5. Select **Save**.

To enable custom CSM Portal documentation:

1. In CSM Administrator, select **Site Manager** to open your CSM Portal site in the Site Editor.
2. Select **Edit**. The **Site Properties** page opens.
3. Select the **Display** page.
4. Select the **Use custom URL** option.
5. Provide an alternate URL in the **Help URL** field (example: a link to an internal documentation system or training documents). This URL replaces the default Cherwell online documentation system URL.

   Important: The URL must be a full URL (example: https://www.sample.com) and not a partial URL (example: sample.com).

6. Select **Save**.

Related concepts

Anonymous Security Group

Related tasks

Define Localization Properties for a Site

Define Banner Properties for a Site

Use the **Banner Properties** page to edit the site banner. Some aspects of the banner may have initially been defined in the Site Wizard. Edit and customize the banner size, color, fonts, and associated images.

To define banner properties for a site:

1. In CSM Administrator, open a site in the Site Editor (**Site Manager > Portal Site Name**.
2. Select the **Banner** page.
3. Select the **Show Header** check box to display a banner at the top of the site.
4. Define a banner background by doing one of the following:
   - Select the **Color Selector** button to select a background banner color.
   - Select **Image** to select an image to use as the banner background.
5. Define a banner image (example: your company's logo):
   a. Select **Browse**. The Image Manager opens.
   b. Select an image.
   c. Select **OK**.
   d. Provide pixel dimensions for the image in the **Size** field.
   e. Select the **Align** drop-down list to edit the alignment of the image within the site banner.

   Note: For best results, use an image size of approximately 134x40 pixels along with a background color that will adjust the size of the banner based on the size of the browser window. In addition, the image file size should not exceed 300 KB.

6. Provide a title for the site in the **Title** field.
7. Select **Image Selector** the **Title** area to change the color of the title.
8. Provide a subtitle for the site in the **Subtitle** field.
9. Select the **Image Selector** in the **Subtitle** area to change the color of the subtitle.
10. (Optional): Provide any additional text for the site banner in the **Baseline Text** field (example: copyright notices).
11. Define a hamburger menu image (example: your company's logo):
    a. Select **Browse**. The Image Manager opens.
    b. Select an image.
    c. Select **OK**. The selected image appears in the hamburger menu image preview field.

    Note: CSM automatically scales images to a height of 25 pixels. The hamburger menu bar replaces the Portal menu bar on mobile screens and browser windows sized below 768 pixels.

12. (Optional): Select the **Fixed Height** check box to make the banner a fixed, specified height. If cleared, the banner resizes to accommodate selected text, images, and margins.
13. (Optional): Select the **Extend Banner fo Application Bar** check box to automatically resize the banner based on the Site's Application Bar.

14. Select the **Margins** button to define top, bottom, right, and left margins around site text.
15. Select **Save**.

Define Footer Properties for a Site

Use the **Footer Properties** page to define background color, images, text, font, and footer size.

The site footer is located at the bottom of the site, and can provide additional general information (such as a copyright notice) or aesthetic value. Use the site's **Footer Properties** page to define:

- What the footer looks like (background color and image, and footer image).
- What and how text displays on the footer (title, subtitle, and baseline text, fonts, and colors).
- The footer's height and position (relative to a margin).

To define footer properties for a site:

1. Open a site in the Site Editor (**CSM Administrator > Site Manager > Portal Site Name**).
2. Select the **Footer** page.
3. Select the **Show Footer** check box to display a footer at the bottom of the site.
4. Define a footer background by doing one of the following:
    - Select the **Color Selector** to select a background banner color.
    - Select **Image** to select an image to use as the banner background.
5. Define a footer image (example: your company's logo):
    a. Select **Browse**. The Image Manager opens.
    b. Select an image.
    c. Select **OK**.
    d. Provide pixel dimensions for the image in the **Size** field.
    e. Select the **Align** drop-down list to edit the alignment of the image within the site banner.
6. Provide a title for the site footer in the **Title** field.
7. Select **Image Selector** in the **Title** area to change the color of the title.
8. Provide a subtitle for the site in the **Subtitle** field.
9. Select **Image Selector** in the **Subtitle** area to change the color of the subtitle.
10. (Optional): Provide any additional text for the site footer in the **Baseline Text** field (example: copyright notices).
11. (Optional): Select the **Fixed Height** check box to make the footer a fixed, specified height. If cleared, the footer resizes to accommodate selected text, images, and margins.
12. Select the **Margins** button to define top, bottom, right, and left margins around site text.
13. Select **Save**.

Define Menu Bar Properties for a Portal Site

Use the **Site Menu Properties** page to define menu items, Actions, tooltips, expressions, and security options for the site menu bar.

The site menu bar is located below the banner and lists the site items, as well as any Actions that support the items. Use a site's **Menu Properties** page to define:

- Which site items display as menu items on the site menu bar.
- Which Action the menu item initiates: Display a dashboard, Service Catalog, or document repository; run a report, display a record.
- The help text that displays on the menu item's tooltip.
- Expressions for showing/hiding and enabling/disabling menu items.
- Security options for showing/hiding and enabling/disabling menu items: For example, Always show, show only for Anonymous (not logged-in Customers), or show only for Logged-in Customers.
- Display options (separators) for groups of menu items.

Related concepts

Define Business Object Actions

Refine/Edit a Site Reference

About Actions

Add Customers to the CSM Portal

Add Menu Items to Site Menu Bar

To add menu items and define menu item properties:

1. Open a site in the Site Editor (**CSM Administrator > Site Manager > Portal Site Name**).
2. Select the **Menu** page.
3. Select the **Show Menu** check box to add a menu bar to the site.
4. Select **Add Action**.
5. Select an **Action** to add to the menu bar.
6. Define general properties for selected Action:
    a. **Action name:** Cannot be changed, displays the name of the selected Action.
    b. **Display text:** Specify the text to display in the menu bar.
    c. Select **Image Manager**.
    d. Select an existing image or import a new image to represent the Action in the menu bar (example: a house icon for home).
    e. **Help text:** Specify a tool tip to display when the cursor is on the menu item.
7. (Optional): Define an expression to display in the menu bar:
    a. Select the **Visible** check box. An expression can still be imported if this check box is cleared. If so, the expression still runs in the background and is not visible in the menu bar.

   b. Select the **ellipsis** to import an existing expression or select the **Custom Expression** button to create a new expression. Imported expressions populate the **Visible Expression** drop-down list.
8. (Optional): Define an expression to enable or disable an item in the menu bar:
   a. Select the **Enabled** check box.
   b. Select the **ellipsis** to import an existing expression or select the **Custom Expression** button to create a new expression. Imported expressions populate the **Visible Expression** drop-down list.
9. Select security options from the drop-down lists to define rights for displaying, enabling, or disabling the menu item:
   - **Visible:** Select whether menu items are visible for all Portal customers (Always), only logged-In Portal customers (Logged-in Only), or only Portal customers who are not logged in (Anonymous Only).
   - Select whether menu items are enabled for all Portal customers (Always), only logged-In Portal customers (Logged-in Only), or only Portal customers who are not logged in (Anonymous Only).
   - **Rights:** Assign Portal rights to make menu items visible/enabled for a customer security group.
10. (Optional): Select the **Begin Group** check box to display a horizontal line before menu items on sub-menus to separate the sub-menu from other items.
11. Select the **Show toolbars** check box to show/hide toolbars on Business Object forms within the Portal site.
12. Repeat Steps 4-10 for all desired menu items. Selected menu items populate the left-hand **Action** pane.
13. Select **Save**.

Define Localization Properties for a Site

Use the **Localization** page to select the default language for a site and to override the startup action, login action, and custom **Search Widget** for each site translation.

To define Localization properties for a site:

1. Select **Site Manager** (**CSM Administrator > Site Manager**).
   The **Site Editor** dialog opens.
2. Navigate to the folder containing the site in the **Sites** tree to display it in the right-hand pane.
3. Select the site in the right-hand pane and then select the **Edit** icon (pencil) in the toolbar; alternatively you can right-click the site and select **Edit**.
   The **Site Properties** page opens.
4. Select the **Localization** page.
5. From the **Default Language** drop-down list, select the default language to display in the **Language Selector** on the **Site Application Bar**.
6. Select the **Show language selector on application bar** check box to show the **Language Selector** for the site; clear the check box to hide the **Language Selector**.
7. Select **Save**.

Related concepts

Define Display Properties for a Site

Translating Strings for Portal Sites

Using Language Packs to Translate Portal Strings

Override Site Options for Each Language

By default, each site uses the startup action, login action, and custom **Search Widget** defined on the **Display Properties** page. You can override these options for each language.

To override site options for a language:

1. Select **Site Manager** (**CSM Administrator > Site Manager**).
   The **Site Editor** dialog opens.
2. Navigate to the folder containing the site in the **Sites** tree to display it in the right-hand pane.
3. Select the site in the right-hand pane and then select the **Edit** icon (pencil) in the toolbar; alternatively you can right-click the site and select **Edit**.
   The **Site Properties** page opens.
4. Select the **Localization** page.
5. Select the language you want to override, and then select **Edit**.
6. From the **View** drop-down list, select a custom view that you may have defined for the language, or use Role-based to determine the view based on the user's role.
7. Select the **Custom Startup Action** check box, and then select the startup action for the translated site. For example, if you have a translated dashboard or HTML page, you can select that.
8. Select the **Custom login action** check box, and then select the login action for the translated site.

9. Select the **Login options** button to override login options for the translated site. For example, you can set alternative text or a privacy link on the login window.
10. Select **OK**.
11. Select **Save**.

Refine/Edit a Site Reference

Additional details for refining and editing a site.

Available Menu Bar Actions

The following are Actions that can be added to the menu bar:

- **One-Step™ Action:** Runs a One-Step Action. You can choose to run an existing One-Step Action or create a new One-Step Action.
- **Command:** Runs a system command applicable to the Portal. Categories include:
  - **Managers:** Adds a command to launch an Item Manager so a customer can choose an item to open/run (example: Add the Report Manager to the site menu bar so customers can choose to run an available report).
  - **Recent Items:** Provides a recent Items list that displays the last five (5) items of the specified type selected by the customer (example: the last five reports run by the customer). This makes sense if you made the Manager available.

    Note: Recent Items lists must be placed inside folders (they cannot be at the top level of the site menu bar), and it is recommend that they be placed as the last item in the folder.

  - **Chat:** Includes commands related to remote support services (example: BeyondTrust) (only available if you have Chat and Remote Support Connector Settings enabled in CSM Administrator).
  - **(Other) Business Object Search:** Provides common site searches (example: Business Object to search, how the results should be sorted, whether to limit to the current customer, and limit to open or closed records).
  - **(Other) Create Business Object:** Creates a new Business Object (record) but with several powerful options, such as a One-Step Action to run as part of the creation process and whether a custom form should be displayed (which can be different than the default form used for viewing a Business Object).
  - **(Other) Go to Edit Mode:** Puts a Business Object record into edit mode so that a customer or user can immediately edit it. This command is designed to be used in an Execute Command One-Step Action, which is the automated equivalent of a customer or user selecting the **Edit** button in the Portal.
  - **(Other) Home:** Takes the customer to the Startup Item (example: dashboard, HTML page).
  - **(Other) New Bus Ob Drop-down list:** Automatic command that displays a default list of create commands for all Associated Business Objects for the site.

    Note: This command must be placed in a folder.

- **Dashboard:** Displays a dashboard. You can display an existing dashboard or create a new dashboard.
- **Report:** Runs a report. You can run an existing report or create a new report.

- **Search:** Runs a saved search. You can run an existing saved search or create a new saved search.
- **Page:** Displays an HTML page. You can display an existing HTML page or create a new HTML page.
- **Document Repository:** You can display an existing document repository or create a new document repository.
- **Action Catalog:** Displays an Action Catalog. You can display an existing Action Catalog or create a new Action Catalog.
- **Folder:** Adds a folder to the toolbar so that you can organize Actions into another level.

Note: Some Actions also allow you to limit scope and Associated Business Object (select the activated **Options** button). We recommend that you limit customers to just the site scope and make items available in just that scope.

Available Site Items

Available site items that can be selected for a Portal site include:

- Action Catalog, (special widget), a dashboard, a document repository, an HTML page, a report, or a saved search (used to display a list of records). For more information, see Site items.

Related concepts

About CSM Item Managers

Configure CSM Remote Support Settings

Define General Settings

Create/Edit a Dashboard

Create a Document Repository

Select a Startup Portal Site

If you have more than one site on your Portal, you can choose a site to first display if the customer goes to the main URL: http://MyServer/CherwellPortal.

Customers can also go directly to a particular Portal site by specifying it as part of the URL:

http://MyServer/CherwellPortal/IT

To select a startup Portal site:

1. Open the Site Manager.
2. Right-click **Site > Set as Default**.
3. Select **Close**.

Related concepts

Site Manager

Troubleshoot a Portal Site

Troubleshooting solutions for Portal issues.

Use the following table to troubleshoot Portal issues.

Problem	Solution
Cannot access tools to create a Portal or site	Check your functionality rights (**CSM Administrator > Security > Edit security groups > User Security Group > Rights tab**).
Customer cannot access a Portal or site	Check the customer's functionality rights (**CSM Administrator > Security > Edit security groups > Customer Security Group > Rights tab**).
Customer cannot access data on a Portal or site	Check the Customer Security Group's data rights(**CSM Administrator > Security > Edit security groups > Customer Security Group > Business Objects tab**).
Portal does not display correct form	Verify the forms were designed in the Portal View, not in the Default View.
Query does not work	Verify the query is set up correctly (not limited to a particular group). Check security; records might not show up if the customer does not have appropriate rights.
Automatic Actions not working	Verify automatic Actions are run from the Portal view, not the Default View.
Customer can edit another customer's record	Change the record ownership rights.
Windows Account not registered message	Create login credentials for the customer.

Configure a Portal

Configure the portal so customers can log Incidents.

Note: The majority of the configuration is conducted using the **Browser and Mobile Settings** page in CSM Administrator.

Required steps include:

- Configure portal security rights.
- Configure client application settings (URL and timeout).
- (Optional) Specify a default domain for the portal.
- (Optional) Configure login, authentication, and inactivity settings for the portal (only if you want them to be different from the Desktop Client).
- Configure anonymous login settings.
- Configure Cherwell credential settings (user/customer password rules).
- Configure miscellaneous browser/portal settings.
- Create portal login credentials for a customer.
- (Optional) Configure customer approvals in the portal.

Related concepts

Configure the Browser Client
Configure Portal Security Rights
Configure Cherwell Credential Settings (User/Customer Password Rules)
Add Customers to the CSM Portal

Configure Portal Security Rights

Configure Portal Security Rights before customers can access the Portal.

Because Portal access must be set differently for anonymous browsers as well as logged-in customers, there are several places that Portal security rights must be set in CSM Administrator before users and customers can access the Portal. The following are all the rights that must be configured for anonymous browser and Portal customers:

- Application rights
- Browser and mobile device rights
- Calendar rights
- Chat Service Integration rights (BeyondTrust)
- Command Manager rights
- Dashboard rights
- Document repository rights
- HTML page rights
- Knowledge rights
- Record locking rights
- One-Step™ Action rights
- Report rights
- Searches rights
- Security features rights
- Sites rights
- Sites Manager rights
- Users' rights
- Visualization rights
- Web Service One-Step Action rights

Related concepts

Security Rights Reference

Configure Customers Approvals for the CSM Portal

Some configuration needs to be done before customers can action approvals in the CSM Portal.

Prerequisites:

Important: Only customers who upgrade to CSM 10.2.0 and later from an earlier version of CSM need to follow these steps. Those who install new installations of CSM already have these changes in the supplied demo content.

Create an approver workgroup

Configure manual customer approvals

Related concepts

Create a Search Results List Widget

Open the Dashboard Editor

About Approvals

About Delegation

Configuring Approvals

Related tasks

Configure Customer Approvals

Create an Approver Workgroup

Configure the Approval Business Object

1. Open CSM Administrator and select **Create a New Blueprint**.
2. Select the **Approval** Business Object.
3. Select **Edit Business Object**.
4. Select **Bus Ob Properties**.
5. On the **General** tab, select the **Show in Search Manager** check box so queries can be created for approvals using the portal.
6. Select **OK** to save the changes.

Make Approvals Visible in the CSM Portal

You can make approvals visible in the portal by using a widget.

Tip: You can also setup your system so that customers can access approvals using links in the emails they receive when an approval has been created. An administrator can set up a link in the email to open the approval record directly, using **Go To Record** links. See Linking Directly to CSM Objects.

1. Create a Search Results List widget.
2. During creation, select **Show results as links** in the **Display** section.
3. For the custom query, select **Approval.Approver ID Equals CurrentUserRecordID()**.
4. Select **Save**.

5. To add the new Search Results List widget to the My Items dashboard for the portal:
   a. Select **Charts > My Items** in the portal.
   b. Open the Dashboard Editor.
   c. Drag the widget from the **Widget** pane onto the My Items dashboard.
   d. Make any remaining changes and then select **Save**.

Configure CSM Portal Customer Security Group

1. Open CSM Administrator and select **Edit Security Groups**.
2. Select **Portal Customer** from the **Group** drop-down list.
3. Select the **Business Objects** tab and then select **Approval** from the **Business Object** drop-down list.
4. Ensure that both **View** and **Edit** check boxes are selected.
5. Select **New Field** in the Approval Business Object and again, ensure that both **View** and **Edit** check boxes are selected.
6. Select **X** and then **Yes** to save your changes.

Track Portal Use With Google Analytics

You can use Google Analytics to track user selections, such as mouse clicks and taps, in the CSM Portal.

For example, you can track:

- User logins
- Portal site usage
- Dashboard usage
- Service Catalog, including categories and services, usage
- Searches (from the toolbar Quick Search only)
- Action link clicks from the home page

User information, search criteria, and other data entered by users is not tracked.

Configuring Google Analytics for the CSM Portal

Prerequisites:

- You must have a Google Analytics account and access to the tracking ID for that account. For details, visit the Google Analytics site.

  Note: CSM supports tracking numbers in both the legacy format: UA-XXXXXX-X and the latest Google Analytics v4 format of: G-XXXXXXX.

- A basic understanding of Google Analytics and how it tracks and reports site usage will help you analyze CSM tracking data. Free training videos are available from Google.

To configure Google Analytics for CSM:

1. In the CSM Administrator main window, select the **Settings** category, and then select the **Edit System Settings** task.
2. Select the **Advanced** page.
3. Select the **Google Analytics Tracking ID (Portal)** check box, and then add your tracking ID to the box.

   Important: Be sure to enter your tracking ID exactly as it is provided by Google Analytics.

4. Select **OK**.

Related concepts

Tips for Using Google Analytics with CSM

Configure Global Advanced Settings

Tips for Using Google Analytics with CSM

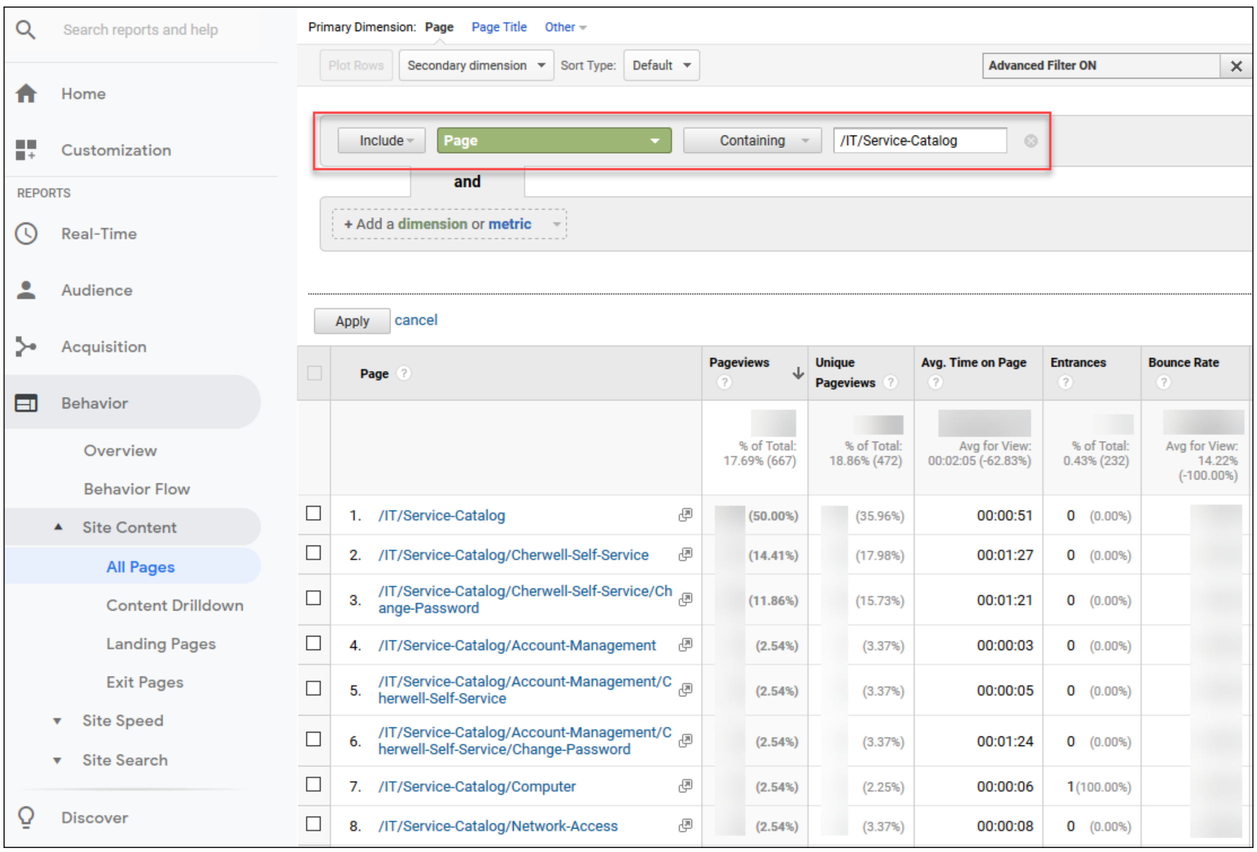
Use these tips for using Google Analytics with CSM.

Google Analytics is a powerful tool for tracking, reporting, and analyzing data from web sites. This topic provides a few tips for using Google Analytics with CSM. For detailed guidance, refer to the Google Analytics documentation.

Use Views to Segregate Site Data

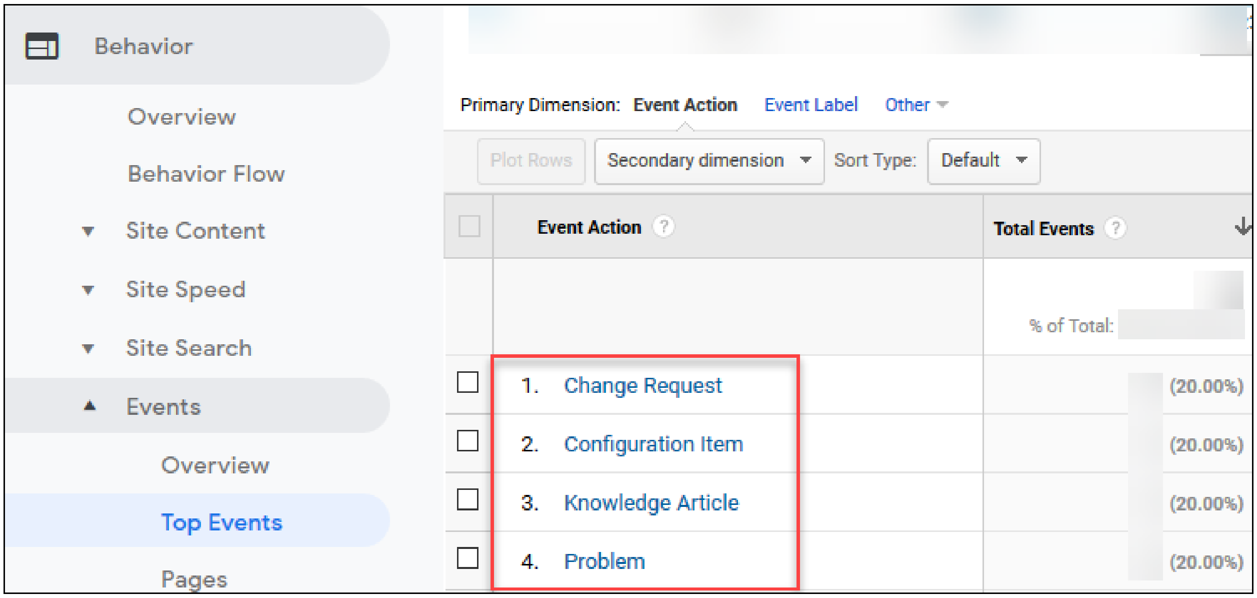
Depending on your reporting needs, you may choose to create views in Google Analytics for each Portal site. This enables you to easily see tracking information specific to each Portal site.

For example, you can create a view to track data for the Portal IT site. You can see page views for all pages for that site for a specific time period or you can filter the list of pages to specific areas, such as the Service Catalog.



Tracking User Interactions

Events differ from page views because they provide data on how users interact with your Portal. For example, you can use events to learn which Business Objects that users are selecting when they search for records from the toolbar Quick Search.



CSM Events include:

- Logins
- Menu selections
- Searches
- Action Links

Events are located in the Behavior area of Google Analytics.

Related concepts

Track Portal Use With Google Analytics

Configure Global Advanced Settings

Supplied Service Catalog and Cards with Search Styling

The Cards with Search style offers a modern, easy-to-navigate styling for Action Catalog items.

The Cards with Search style was introduced to the shipped Service Catalog in CSM 9.2.0.

Implementing Cards with Search

If you upgraded from an earlier version of CSM, you can implement the Cards with Search theme two ways:

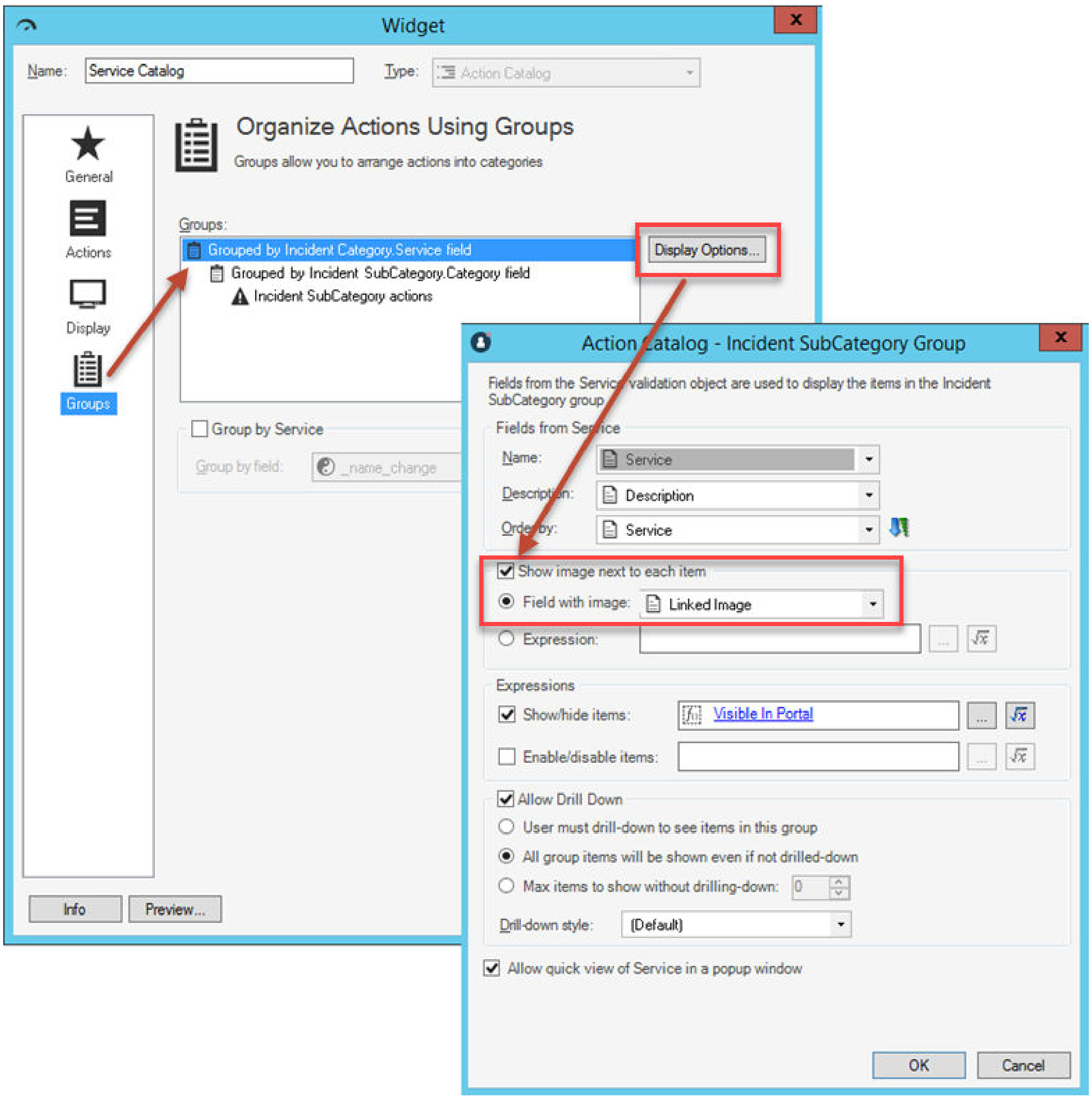
- Edit the existing Service Catalog widget
- Create a new widget to act as your Service Catalog

Using Images in Cards with Search

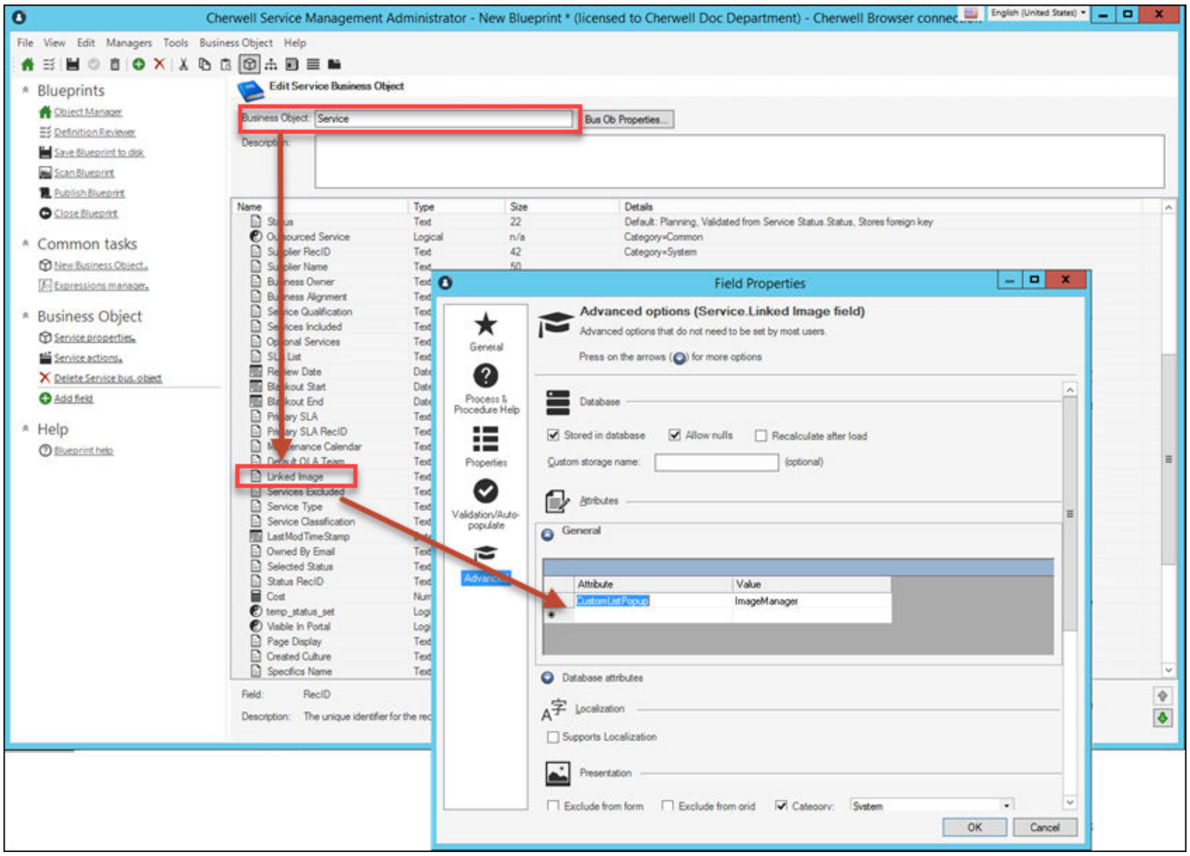
Cards with Search styling supports custom images at the root level, but not the action level. Use the **Groups** page of the **Widget** dialog to link to a custom image.

To display images with root-level services in the Cards with Search view:

1. In the **Groups** page of the Service Catalog widget, select **Display Options** for the top-level group.
2. Select the **Show image next to each item** check box.



3. Select the **Field with Image** option, then select **Linked Image** from the drop-down menu.



Related concepts

About the Service Catalog

Example: Enable Anonymous View of Service Catalog

Related tasks

Implement the Supplied Service Catalog (Use an Existing Service Catalog Widget)

Implement the Supplied Service Catalog (Create a New Service Catalog Widget)

Implement the Supplied Service Catalog (Use an Existing Service Catalog Widget)

Use the Widget Manager to implement the supplied Service Catalog.

To update an existing Service Catalog to use the Cards with Search style introduced in the CSM 9.2.0 supplied Service Catalog:

1. From the Widget Manager, right-click **Service Catalog**, and then select **Edit**.
2. Select the **Display** page, and then select **Cards with Search** or **Cards with Search v2** from the **Style** drop-down list.
3. If necessary, add a description field in each lookup table, then add the field to the associated form.
4. Select the **Show Image next to each command** check box.
   a. Select **Field with Image** to select a source for the image. The fields available in the drop-down list are related to the Action Business Object selected on the **Actions** page.
   b. Select **Expression** to build an expression to provide an image.

Note: To use card images on a single-level Service Catalog, ensure the Action Business Object you choose has a field that stores images.

Implement the Supplied Service Catalog (Create a New Service Catalog Widget)

Create a new widget to implement the supplied Service Catalog.

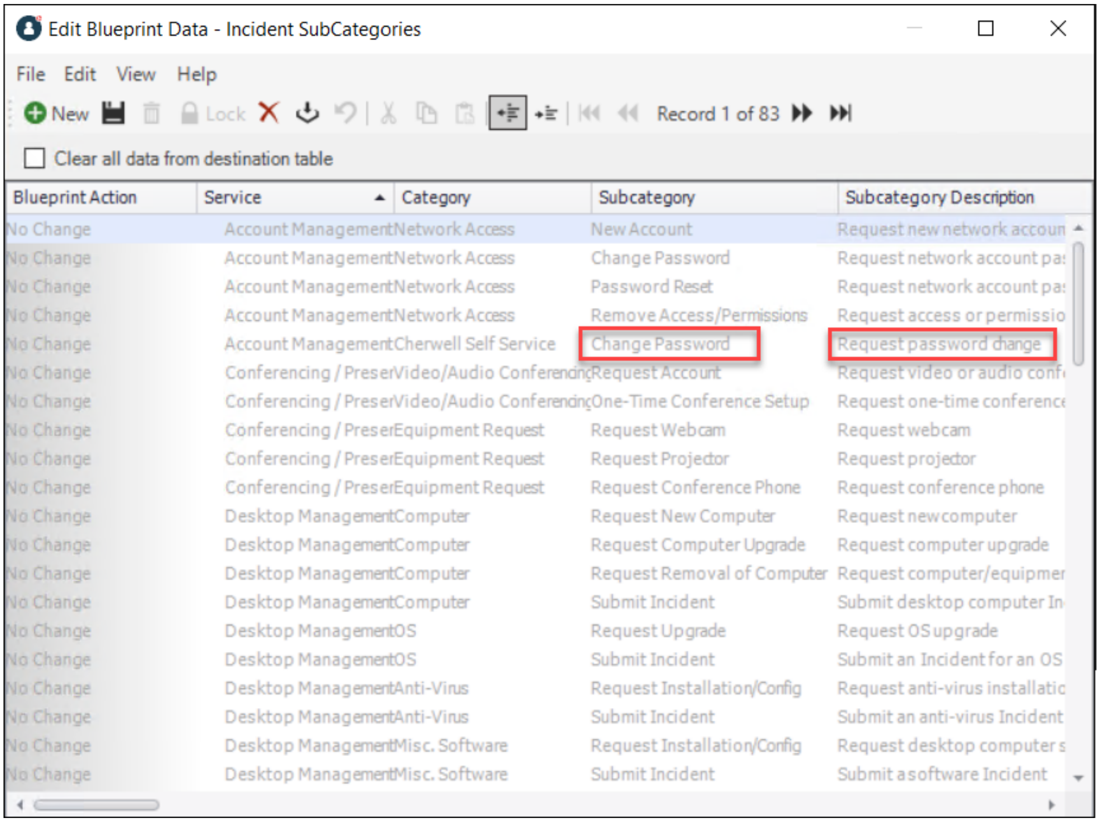
To create a new Service Catalog using the Cards with Search style introduced in the CSM 9.2.0 supplied Service Catalog:

Create a New Service Catalog Widget:

1. In CSM Administrator, create a new Blueprint.
2. Open the Widget Manager and create a new Action Catalog widget.
3. Select the **Display** page, and then select **Cards with Search** or **Cards with Search v2** from the **Style** drop-down menu.
   The image on each parent-level card shows either custom images or pre-CSM 9.2.0 supplied images.
4. Select the **Groups** page, and then select **Display Options** for the top-level group.
5. Select the **Show image next to each item** check box.
6. Select the **Field with Image** option, and then select **Linked Image** from the drop-down menu.
7. Finish any necessary fields to complete the Service Catalog widget.

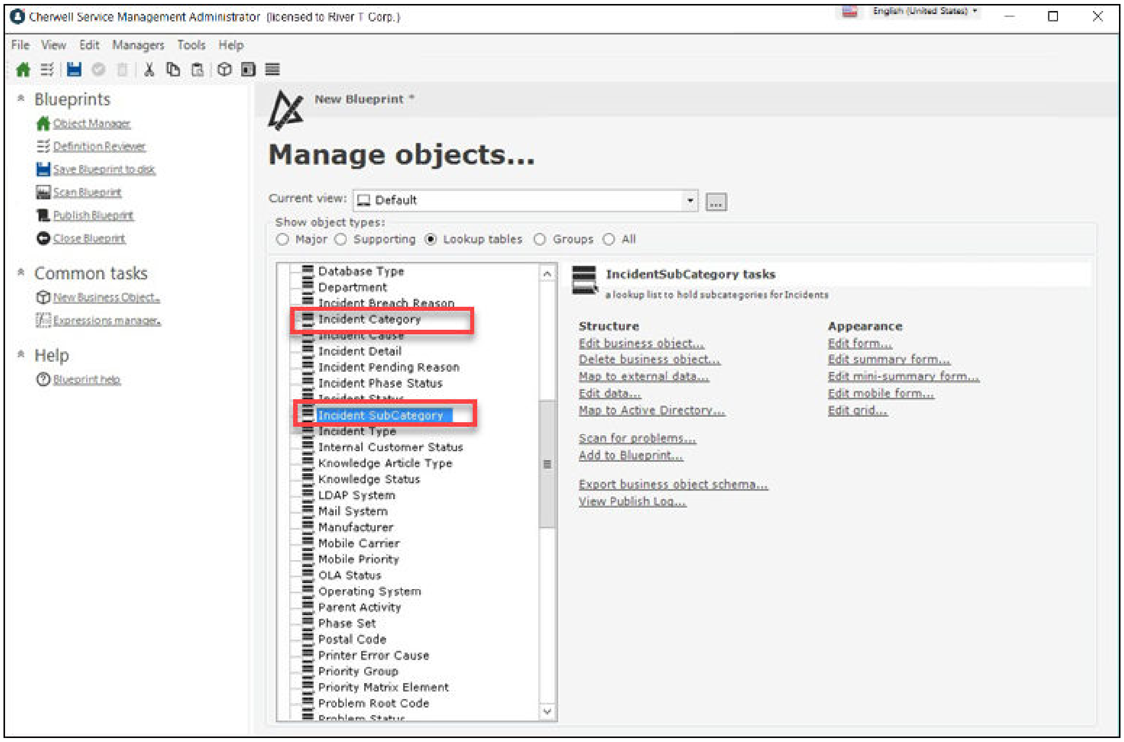
Map Description Fields

8. **Important:** The Incident Category and Incident Subcategory lookup tables also need a description field to take advantage of the Cards with Search style. The title and description text in each parent-level card are mapped to the description fields in the Service Major Business Object. The child-level cards are mapped to description fields in the Incident Category and Incident Subcategory Lookup tables.

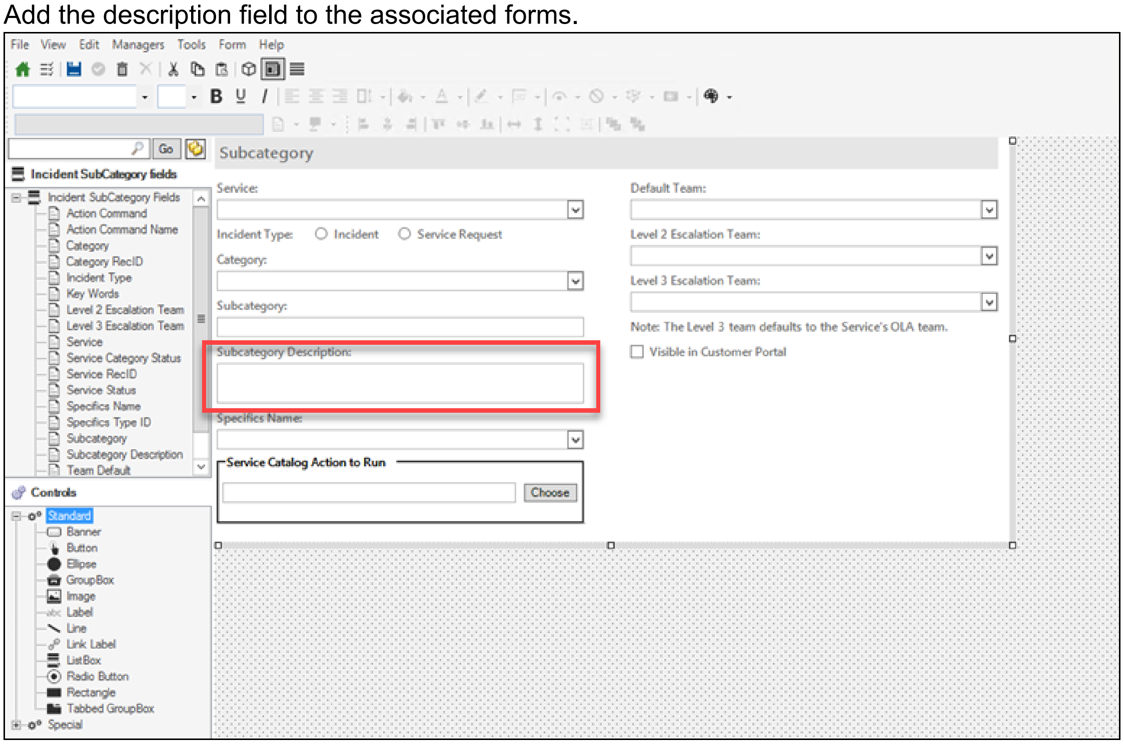


If your database does not have a description field in those Lookup tables, follow these steps:

a. Add description fields to the Incident Category and Incident Subcategory Lookup tables.



b. Add the description field to the associated forms.



Add the New Widget to the Portal Menu:

9. Open the Site Manager.
10. Right-click the portal site you want to add the new Service Catalog widget to and select **Edit**.
    a. Select the **Menu** page, and then select the **Add action** down arrow.
    b. Select **Add Action Catalog action**.
       The Widget Manager opens.
11. Select the new widget.

Enable Anonymous View of the Service Catalog

The CSM Portal can be configured to allow anonymous users to view the Service Catalog without having to log in.

Note: Anonymous access requires some initial configuration. See Anonymous security group for specific information.

Enable Anonymous view of the Service Catalog Business Object and then determine the way(s) in which you prefer to enable the Service Catalog for Anonymous view on the CSM Portal, including configuring the Service Catalog to show on startup, as a menu item enabled for anonymous access, or as an Action Catalog widget enabled for anonymous access.

Enable Anonymous View of the Service Catalog Business Object

1. In CSM Administrator, select **Security > Edit security groups**.
2. In the **Group** drop-down list, select the **Anonymous Security Group** (Default name: Anonymous Browser).
3. Select the **Business Objects** tab.
4. In the **Business Object** drop-down list, select the **Service Catalog Business Object** (Default name: Service).
5. Select the **View** check box for the Business Object and all associated fields. You must also grant **View** permissions to any additional Business Objects associated with the selected Business Object (example: Incident Category, Incident SubCategory).
6. Select **Save**.
7. Enable Anonymous View of any additional Business Objects associated with the Service Catalog that should be visible to anonymous users.
8. Configure at least one of the following views for anonymous users.

Configure the Service Catalog to Show on Startup

1. In CSM Administrator, select **Browser and Mobile > Site Manager**.
2. Right-click on the site designed as your CSM Portal and select **Edit**.
3. Select the **Display** tab.
4. In the **Show on startup** field, browse for and select **Service Catalog**.
5. Select **OK**.
6. Select **Save**.

Enable Anonymous View of an Action Catalog Widget

An Action Catalog widget can be used to build a dynamic Service Catalog that is organized by Category and Service, and is capable of executing Actions. Anonymous users can be enabled to view the Service Catalog through this widget when they select a link to the Action Catalog from a dashboard, menu link, or button.

1. Open the Widget Manager.
2. Create an Action Catalog widget or modify an existing Action Catalog widget (Shipped Example: Service Catalog) by right-clicking on the existing widget and selecting **Edit**.
3. In the **General** tab, follow the steps to define the General Properties for the Action Catalog widget. Select the**Allow Anonymous Access to Action Catalog in the Portal** check box. When selected, the Action Catalog is viewable to anonymous users.

   Note: When this check box is cleared, the Action Catalog is **not** viewable to anonymous users even if the associated Business Object(s) are configured to allow anonymous access.

4. Add a link to the Action Catalog from a dashboard, menu link, or button.

Configure the Service Catalog as a Menu Item with Anonymous Access

1. Enable Anonymous View of an Action Catalog widget (see above).
2. Follow the steps to add menu items to a site menu bar.
   a. If the Action Catalog action already exists in the menu (Default: Service Catalog), select it to view the menu properties. If the Action Catalog action does not already exist in the menu, in the **Add Action** drop-down list, select **Add Action Catalog action** and select the specific Action Catalog (Default name: Service Catalog).
   b. In the **Security Options** section, select the **Visible** drop-down list and select **Always** or **Anonymous only**.

Configuration Management Page

Use the **Browser and Mobile Settings** page to access many of the CSM Portal and Browser Client management and configuration tasks.

Browser and Mobile Settings can be found in **CSM Administrator > Browser and Mobile**.

Configuration tasks include:

- **Site Manager**: Use to manage Portal sites.
- **Browser Application Settings**: Use to configure URLs and session timeouts.
- **HTML Page Manager**: Use to manage HTML pages.
- **Document Repository Manager**: Use to manage document repositories.
- **Twitter Account Manager**: Use to manage Twitter accounts.
- **Web Services Manager**: Use to configure web services used for One-Step™ Actions.
- **Edit Mobile Configuration**: Use to set defaults (dashboards, Business Objects, and Actions) for the entire system or for each role for Cherwell Mobile™.
- **Open Mobile Dashboard Editor**: Use to manage Mobile dashboards specifically designed for use on mobile devices.

Add a Portal Login Command to a CSM Portal Dashboard, Menu, or Form

Use the Portal Login command as the action for a button or link on a CSM Portal dashboard or form. The Portal Login command can also be added as an action in a CSM Portal menu.

When the button, link, or menu item is selected in the CSM Portal, the user is prompted with a Login dialog.

Note: The Portal Login command is not supported in the CSM Desktop Client, CSM Browser Client, or One-Step Actions.

Add a Portal Login Command to a Dashboard

1. Open CSM Administrator and select **Create a New Blueprint**.
2. In the **Managers** menu, select **Dashboards > Dashboard Manager**.
3. Select the Portal dashboard you wish to edit and select **Edit**.
4. In the left pane, select and drag a **Button** or **Link** onto the dashboard.
5. Right-click the **Button** or **Link Label** and select **Widget properties > Widget properties**.
6. Select the **ellipsis** to the right of the **Action** field.
7. In the left pane, select **Commands**.
8. In the middle pane, select **System > Other**.
9. In the right pane, select **Portal Login**.
10. Select **OK** and then **OK** again.
11. Make any additional changes to the control (example: change displayed text from "Button" to "Login").
12. **Save** the changes.

Add a Portal Login Command to a Menu

1. Open CSM Administrator and select **Site Manager**.
2. Right-click **IT** and select **Edit**.
3. In the left pane, select **Menu**.
4. In the middle pane, select **Add Action > Add Command Action**.
5. In the left pane, select **System > Other**.
6. In the right pane, select **Portal Login**.
7. Select **OK**.
8. Select **Save**.
9. **Close** the Site Manager.

Add a Portal Login Command to a Form

1. Open CSM Administrator and select **Create a New Blueprint**.

2. In the **Current view** drop-down list, select **Portal Default**.
3. Select a Business Object (example: Knowledge Article) and then select **Edit form**.
4. In the **Controls** pane, select and drag a **Button** or **Link Label** onto the form.
5. Right-click the **Button** or **Link Label** and select **Control properties**.
6. Select the **ellipsis** to the right of the **Action** field.
7. In the left pane, select **Commands**.
8. In the middle pane, select **System > Other**.
9. In the right pane, select **Portal Login**.
10. Select **OK** and then **OK** again.
11. Make any additional changes to the control (Example: change displayed text from "Button" to "Login").
12. **Save** the changes.

CSM Web Applications and Accessibility

To support Users with disabilities, many Browser Client and CSM Portal features are accessible using a keyboard and screen reader.

For best results with keyboard navigation, use the Chrome web browser.

Good to Know

- While CSM OOTB content addresses specific accessibility requirements, it is the responsibility of each administrator and developer to ensure customized content is configured and designed to meet accessibility requirements.
- Cherwell® strives to ensure that its applications are accessible to users with visual and auditory impairments. There are cases, however, where accessibility may be limited. For details about CSM accessibility, see the Accessibility Conformance Report. You must be logged in to the Documentation Portal with customer or partner credentials to view this content.
- The CSM Web Applications have been tested with the JAWS® (Job Access With Speech) for Windows® screen reader. Other screen readers may provide full or partial capabilities with CSM.

CSM Web Applications Keyboard Accessibility

Keyboard commands enabled users to navigate the Browser Client and CSM Portal without using a mouse.

General Keyboard Commands

Key	Action
Tab	Move forward from one link or form control to the next.
SHIFT+Tab	Move backward through one link or form control.
Enter	Activate the selected link or control.
Spacebar	Select a record or option.
CTRL+Spacebar	Clear the current selection. For multi-selections, clears or selects while persisting previous selections.
Page Up and Page Down	Scroll the page up or down.
Arrows	Scroll through links and controls on a page.
ALT+Arrow-left	Move to the previous page.
ALT+Arrow-right	Move to the next page.

Form Keyboard Commands

Use the following keyboard commands when focus is on a record form or an element on that form.

Key	Action
Enter	Selects the highlighted item.
Home	Selects the first item in a drop-down.
End	Selects the last item in a drop-down.
Spacebar	Selects a highlighted radio button or check box.
ALT+down arrow	Opens a pop-up or a drop-down.
Esc or ALT+up arrow	Closes a pop-up or drop-down.

Grid Toolbar and Header Keyboard Commands

Use the following keyboard commands when focus is on the Grid column header.

Key	Action
Enter	Sort the column.

Key	Action
Spacebar	Select and clear items.
ALT+Down arrow	Opens the filter menu.
Esc	Closes the filter menu.
ALT+M	Toggles the Multi-column Sort option.

Grid Item List Commands

Use the following commands when focus is on the Grid item list.

Key	Action
ALT+W	Applies focus to the Grid item list.
Enter	Expand and collapse cells.
Space	Select and clear cells.
CTRL+Spacebar	Select cells, but persist previously selected cells.
Page Up and Page Down	Navigate through multiple Grid pages.

Multi-Tab Browsing Support

The Browser Client and Customer Portal allow you to operate in multiple web browser tabs, which enables you to work on multiple pages within CSM. This allows technicians, system administrators, and customers to work more efficiently.

Multi-tab browsing allows you to:

- Log in via the first tab and then load CSM in additional tabs without needing to log in again or consume additional licenses.
- Work with multiple CSM features at the same time. For example, a technician might log an Incident in one tab and view their default Dashboard in another.
- Use the Culture Selector to select a language and work in the tabs independently within the same session. If a User has multiple tabs open in different languages and the session expires or the User manually logs out, the User is logged out of all tabs. When the User logs back in to a tab, the language for that tab is the last language that was selected before the User logged out.

  Culture support for multi-tab browsing support works slightly differently in the CSM Browser Client than the CSM Portal:

  - CSM Browser Client: Multi-tab browsing support allows you to open tabs in multiple languages and work in the tabs within the same session. If you have multiple tabs open and select a new culture, only the tab you are selecting that culture from refreshes to display the newly chosen culture. The other tabs remain in the previous culture.
  - CSM Portal: Multi-tab browsing support allows you to work in multiple tabs of the same culture within the same session. If you have multiple tabs open and select a new culture, all tabs refresh to display the newly chosen culture. You can't have multiple tabs with different cultures open.

Multiple features use a unique tab display name, which allows Users to easily identify what they are working in each tab. Features that support tab names include:

- **Forms:** Major Business Objects (Incident, Problem, etc.) use the Public ID field to populate the tab name. The Public ID is defined in the Business Object Properties window.
- **Quick Search:** Quick Search results use the phrase *Quick Search Results* and Business Object Quick Search Results use the phrase *<Business Object> Search Results* in the tab name.
- **Saved Searches:** Searches use the phrase *<Search Name> Search Results* in the tab name. Search names are defined using the Search Manager.
- **Tools:** Tool drop-down items (Contact Manager, Table Management, and CMDB) use the phrase *<Tool Name> Search Results* to populate the tab name.
- **Reports:** Reports use the phrase *<Report Name>* in the tab name. Report names are defined using the Report Manager.
- **Dashboards:** Dashboards (Global IT, Portal pages, etc.) use the phrase *<Dashboard Name>* as the tab name. Dashboard names are defined in the Dashboard Properties window.
- **Calendars:** Calendars use the phrase *<Calendar Name>* as the tab name. Calendar names are defined in the Calendar properties window.

- **Quick View:** Quick View selections use the Public ID field to populate the tab name. The Public ID is defined in the Business Object Properties window.
- **Go to Item Functionality:** Go To Item selections use the Public ID field to populate the tab name. The Public ID is defined in the Business Object Properties window.
- **Startup Items:** Portal Site startup items use the phrase <*Startup Item Name*> as the tab name. The startup item name is defined on the Display page of the Site Editor.
- **Service Catalog:** The Service Catalog in the Customer Portal uses the phrase <*Service Catalog*> as the tab name. The tab name is defined in the Widget Properties window of the Service Catalog Widget.
- **HTML Pages:** HTML Pages use the Name field to populate the tab name. The Name is defined in the HTML Page Options window of the HTML Editor.
- **Document Repository:** The Documentation Repository in the Customer Portal uses the phrase *Document Repository* as the tab name.

Multi-tab browsing support is powered by a Command called New Window, which can be found in the Command Manager.

Open a New Tab in the Browser Client

Use multi-tab browsing support to open a new tab in the Browser Client.

1. Open a web browser.
2. Navigate to the **Browser Client** (http://MyServer/CherwellClient).
3. Log in using the appropriate credentials.
4. Click the **User Information** section of the Application Bar and select **New Browser Window**.

   A browser window opens in a new tab and displays the default Dashboard.

   Note: If you open a browser window in a new tab outside of CSM, navigate to the configured URL. Do not copy the URL from the address bar in one tab and use it in another.

5. (Optional) Open up to four additional tabs.
   When the session expires or the User manually logs out, the User is logged out of all tabs. To log back in, the User needs to open new tabs and close the old tabs.

Open a New Tab in the Portal

Use multi-tab browsing support to open a new tab in the Portal.

1. Open a web browser.
2. Navigate to the **Portal** (http://MyServer/CherwellPortal/SiteName).
3. Log in using the appropriate credentials.
4. Click the **User Information** section of the Application Bar and select **New Browser Window**.

   A browser window opens in a new tab and displays the default home page.

   Note: If you open a browser window in a new tab outside of CSM, navigate to the configured URL. Do not copy the URL from the address bar in one tab and use it in another.

5. (Optional) Open up to four additional tabs.
   When the session expires or the User manually logs out, the User is logged out of all tabs. To log back in, the User needs to open new tabs and close the old tabs.

Add a New Window Command to the Browser Client and CSM Portal

Use the New Window command to add multi-tab browsing support to additional areas of the Browser Client and CSM Portal.

When the command is implemented, you can navigate to CSM in additional tabs so you don't need to log in again or consume additional licenses (the new window opens the main dashboard by default). Consider creating a One-Step Action using the Execute a Command Action to add the functionality to even more areas of your system.

You can add the command to multiple areas of the Browser Client, including forms and dashboards.

For example:

- Add the command (via a One-Step Action) to a Knowledge Article form using a Link Label Control so users can easily navigate to a new window while keeping Knowledge Article information open.
- Add the command (via a One-Step Action) to the Global IT dashboard so users can easily navigate to a record while simultaneously viewing their metrics.

You can also add the command to areas of the CSM Portal, including the menu bar and forms.

For example:

- Add the command (via a One-Step Action) to the menu bar so users can easily navigate to a new window from anywhere in the Portal.
- Add the command (via a One-Step Action) to the read-only Knowledge Article form using a Link Label Control so customers can easily navigate to a new window while keeping Knowledge Article information open.

Note: For a full list of areas where you can add commands in CSM, See ../suite_features/one-steps/add_actions_to_csm_areas.xml#D14817.

Troubleshoot the CSM Web Applications

Administrators who have access to the server on which the web applications are installed can use troubleshooting steps to solve issues with these applications.

If the CSM Web Applications are not working, use the following steps to troubleshoot.

1. Make sure data source setting for both and the CSM Portal and Browser Client is pointing to the correct connection (the default is Cherwell Browser):
   a. Use the Command-Line Configure utility to pass the following command to Overwatch.

      ```
      /updateportalsettings /trebuchetdatasource=[Common]CherwellBrowser
      ```

   b. Use the Command-Line Configure utility to pass the following command to Overwatch.

      ```
      /updatebrowserclientsettings /trebuchetdatasource=[Common]CherwellB
      rowser
      ```

2. Make sure the Browser Client connection is using SQL Authentication or domain account permissions have been set up appropriately:
   a. If SQL is installed on same machine as IIS, Users can give the IUSR_<machineName> account rights to the SQL server database.
   b. If SQL is not installed on the same machine as IIS, Users have to create a domain account, give that account rights to the SQL server database and also set up the application in IIS to use that account. In addition, Users must give that account rights to the directory (and subdirectories) where the Browser applications are installed.
3. Make sure IIS is set up for Anonymous Access. If desired, enable Integrated Windows Authentication:
   a. Go into IIS. On the left is the Internet Information Services tree. Expand the Web Sites node and then the Default Web Site node underneath. Find the folder for the Browser application.
      - In IIS-7 (Windows Server 2008), click the application in the left-hand pane, then double-click **Authentication** in the IIS section of the features view on the right. If Anonymous Authentication is not enabled, select it, then click **Enable** in the far right Actions pane. Do the same thing for Windows Authentication if desired. Note that, if Windows Authentication does not appear, you might need to go the Server Manager to install the feature.
4. Consider the Browser being used (only if you are using Windows Authentication):
   - Firefox cannot pass Windows credentials properly unless you install their plug-in. Try Internet Explorer and see if this works.
5. Verify that the supported version of ASP.NET is registered in the Windows Registry.

Troubleshoot Uploading Attachments

If Users are having trouble uploading attachments, make sure that they have rights to the Attachments directory.

1. Go into IIS and find the Attachments directory under the Self-Service virtual directory.
2. Right-click and select **Properties**.
3. Go to the **Directory Security** tab.
4. Press the **Edit** button in the Anonymous Access box. Ensure that User is set up.

Note: Users might also need rights to the actual directory on the hard drive.

Troubleshoot Grids in Internet Explorer

In some older versions fo Internet Explorer, Grids sometimes do not align properly after sorting the Grid columns. In order to correct this, Users must disable the Compatibility View setting in Internet Explorer.

To disable Compatibility View:

1. Open Internet Explorer.
2. Click **Tools** to open the Tools menu, and then click **Compatibility View Settings**.
3. If the CSM Browser Client is displayed in the list of sites to display in Compatibility mode, remove it.
4. Users can also disable Compatibility View by clicking the Compatibility View button  in the web address bar.

CSM Administrator

Cherwell Service Management Administrator (CSM Administrator) is CSM's administrative tool, which is used to configure, manage, secure, integrate, and automate your CSM system.

About CSM Administrator

Use CSM Administrator features to configure and manage your CSM system.

Administrative features include:

- **Automation Processes:** Pause/resume the Automation Process Service, enable/disable Automation Processes, manage automation rules, and define Business Hours.
- **Blueprints:** Configure and manage system definitions (example: Business Objects, Fields, Forms, Grids, etc.) and CSM Items (example: Dashboards, Saved Searches, etc.), and to access definition-driven tools/functionality (example: Directory Service settings, Schemas, etc.).
- **Browser and Mobile Settings**: Edit Browser and Mobile options (HTML Page Manager, Twitter Account Manager, etc.).
- **Database:** Import and export data, and perform system maintenance.
- **E-mail and Event Monitoring:** Pause/resume the E-mail and Event Monitor Service, configure Outlook® Integration, and configure/manage e-mail accounts and settings.
- **Globalization**: Translate text, referred to as "strings," into one or more single-byte languages so Users can use a single CSM installation to view the same data in multiple languages.
- **mApp Solutions:** Transfer bundles of CSM functionality between CSM systems.
- **Performance**: Run the Health Check tool to monitor and optimize system configurations that impact performance.
- **Scheduling:** Pause/resume the Scheduler Service and manage scheduled items.
- **Web Applications:** Build/manage Customer Portals, manage Browser Client settings, and manage browser tools.
- **Security:** Use Security Groups, Roles, Teams/Workgroups, and User/Customer profiles to control people, functionality, data, environment, and sharing.
- **Settings:** Configure Global System settings, such as General settings (example: Search, display, etc.), User Interface settings (example: Task Pane, toolbar, etc.), Table Management settings, etc.
- **Trusted Agents**: Connect to the Trusted Agents Hub and create Trusted Agents service groups.

Log in to the CSM Desktop Client or CSM Administrator

Log in to the CSM Desktop Client or CSM Administrator from the machine on which these Windows-based clients are installed.

To log in to the Windows-based clients:

1. Double-click the **Cherwell Service Management** icon or **CSM Administrator** icon on the desktop, or select **Start>All Programs>Cherwell Service Management** or **Cherwell Administrator**.

   Note: If the **Automatically Use Connection Without Asking** check box was previously selected or if the system administrator already set up a permanent database connection, the database connection window will not open.

2. Select the **All Users** tab to view database connections available to all users or the **User** tab to view database connections available to only to the user logging in.
3. Select a database connection. Typically, you connect using an Application Server (3-tier connection), identified by the Application Server icon .
4. Select the **Automatically Use Connection Without Asking** check box to automatically use this database connection each time CSM is launched.
5. Provide your CSM login information:
   - **User ID**: Provide your CSM login ID. This could be domain name/network user name or just a username).
   - **Password**: Provide your CSM password. Passwords are case-sensitive.
6. Select **OK**.
   If you are assigned to more than one CSM role and have not previously selected the **Automatically Use Selected Role** check box, the **Choose Role** window opens.
7. Select the appropriate login role for the session.
8. Select the **Always Use Selected Role** check box to automatically use the selected role at the next log in.

Related concepts

Connections

About Roles

Tour the CSM Administrator User Interface

The CSM Administrator User Interface (UI) is dynamic and changes to show helpful and appropriate options for the administrative tasks being performed. Generally, the Main window shows the following items:

- Menu bar: Access general administrative tasks.
- Task Pane: Access common administrative tasks, and administrative tasks organized by category.
- Main Pane: View data and to perform the majority of your administrative tasks.

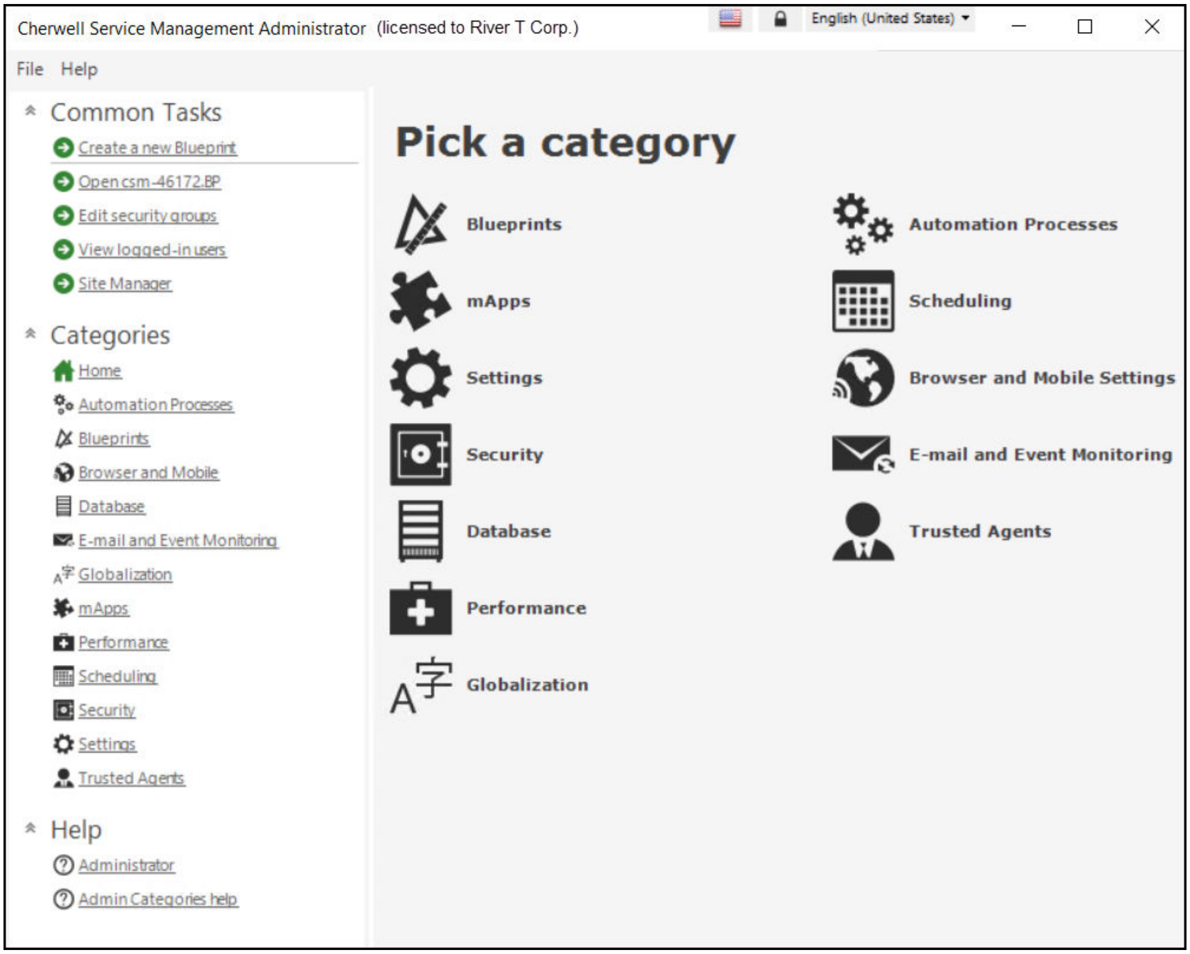
When you first log in to CSM Administrator, the Main Pane displays a Getting Started page to help initially configure the system. After initial configuration, the Main Pane automatically displays the Home page , which lists the administrative task categories.

When working in a Blueprint, the entire UI (menu bar, Task Pane, and Main Pane) dramatically changes to accommodate the Blueprint Editor, which is required to perform Blueprint operations.

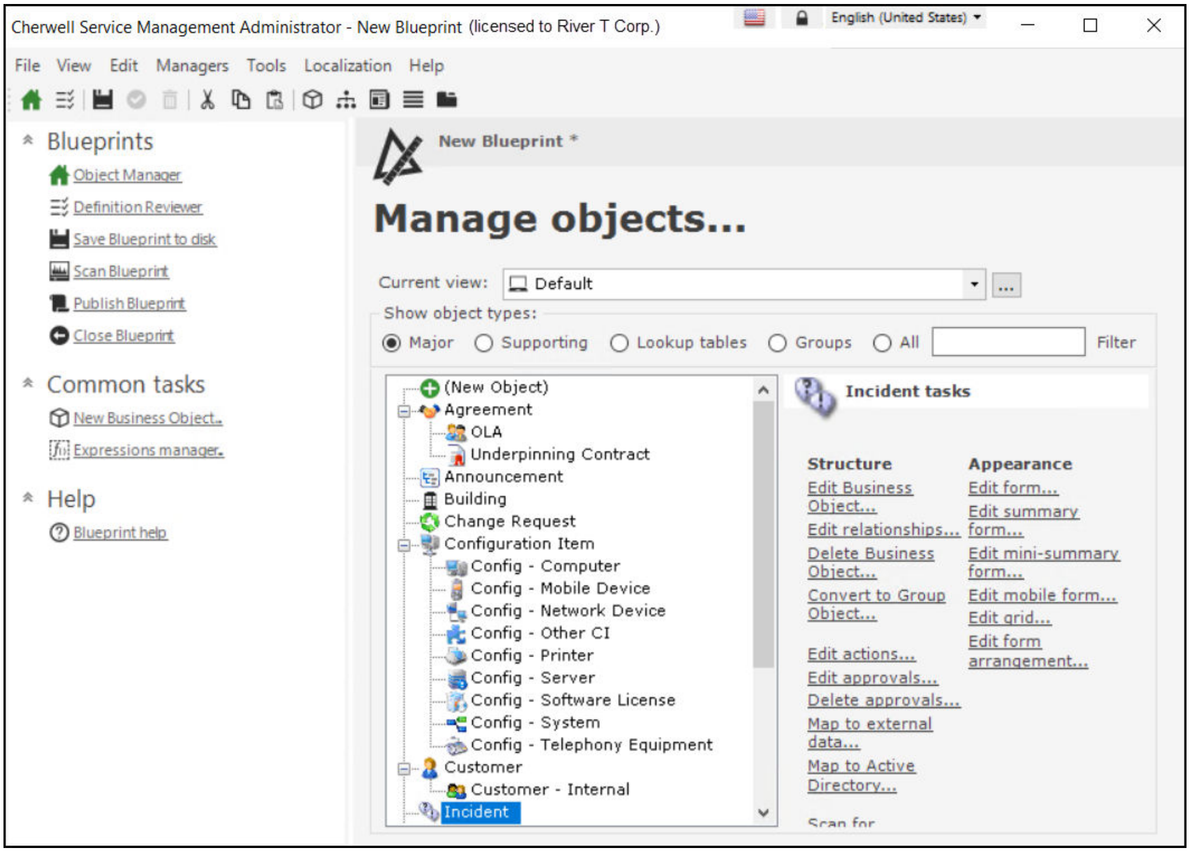
Note: For more information about the Blueprints and the Blueprint Editor, see the Blueprint documentation.

The following figure shows two sample Main windows:

- The Home view that appears when logging in to CSM Administrator (or click the **Home** button ) and includes categories of functionality.



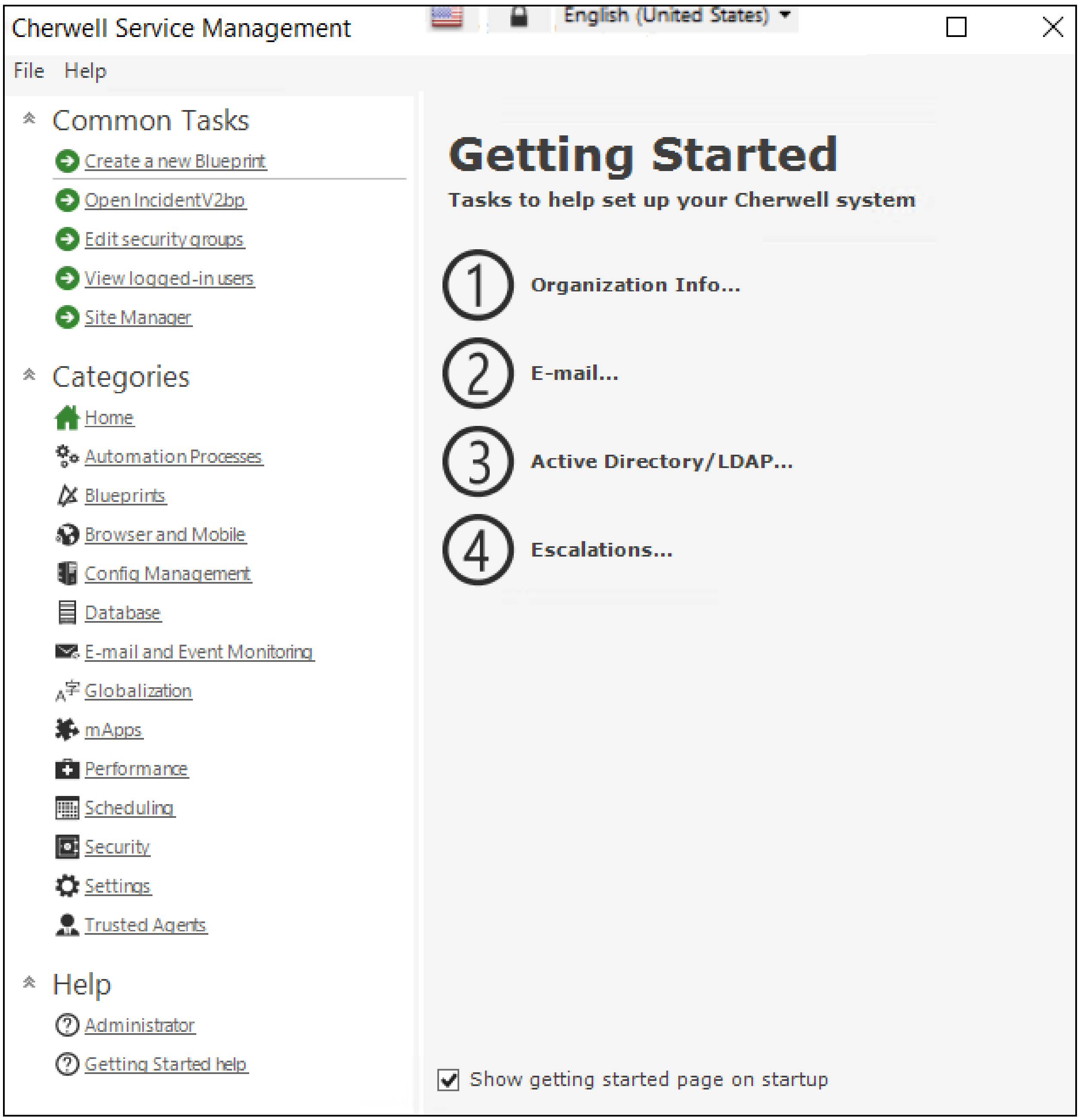
- The Blueprint Editor, which appears when creating a Blueprint. Notice that the Menu bar and Task Pane change to accommodate whatever item is active in the Main Pane. A toolbar shows when the Blueprint Editor is active.


Cherwell Service Management Administrator - New Blueprint (licensed to River T Corp.)
English (United States)
File View Edit Managers Tools Localization Help
Blueprints
Object Manager
Definition Reviewer
Save Blueprint to disk
Scan Blueprint
Publish Blueprint
Close Blueprint
Common tasks
New Business Object...
Expressions manager...
Help
Blueprint help
New Blueprint *
Manage objects...
Current view:
Default
Show object types:
Major
Supporting
Lookup tables
Groups
All
Filter
(New Object)
Agreement
OLA
Underpinning Contract
Announcement
Building
Change Request
Configuration Item
Config - Computer
Config - Mobile Device
Config - Network Device
Config - Other CI
Config - Printer
Config - Server
Config - Software License
Config - System
Config - Telephony Equipment
Customer
Customer - Internal
Incident
Incident tasks
Structure
Edit Business Object...
Edit relationships...
Delete Business Object...
Convert to Group Object...
Edit actions...
Edit approvals...
Delete approvals...
Map to external data...
Map to Active Directory...
Appearance
Edit form...
Edit summary form...
Edit mini-summary form...
Edit mobile form...
Edit grid...
Edit form arrangement...

CSM Administrator Getting Started Page

By default, CSM Administrator opens a Getting Started page to help set up the CSM system.

Note: Also access the Getting Started page by selecting **Help>Go to Getting Started Page**.



To use the Getting Started page, click the task to complete. Available options include:

- **Organization Info:** Edit the name, the logo, and a theme that represents the organization.
- **E-mail:** Select e-mail addresses to be used in Automation Processes and for various notifications. Edit the e-mail signature in this location.
- **Active Directory/LDAP:** Edit the LDAP settings used to access information in a Directory Service (a directory stored on a server).
- **Escalations:** Select which escalations and notification Automation Processes to enable or disable.

After you complete a task, a green check mark appears over the number of the task. When finished setting up the CSM system and the Getting Started page is no longer needed, clear the check box at the bottom of the window.

Note: The Menu bar is limited to File and Help and no toolbar exists. All options are accessed in the panes.

CSM Supporting Applications

Most supporting applications can be accessed from the Cherwell Service Management installation directory. Exceptions include supporting web applications, which are accessed using a web browser.

The CSM suite includes the following supporting applications:

- **Dashboard Viewer**: The Dashboard Viewer is a stand-alone tool that displays a single CSM dashboard or cycles through a group of dashboards (called a Slideshow) without consuming a license.
- **Report Runner**: The Report Runner is a stand-alone tool that allows users to create and run reports using CSM data without consuming a license.
- **Auto-Deploy**: Auto-Deploy is an installation tool that allows system administrators to automatically distribute preconfigured client installations and connections to client machines. Auto-Deploy is configured using the stand-alone Auto-Deploy Configuration Utility and is deployed using the Auto-Deploy web page.
- **Server Manager**: The Server Manager is a stand-alone tool that allows on-premise system administrators to efficiently monitor, manage (start, stop, or restart), and configure (database connections, login authentication, logging, etc.) the CSM services, and restart some managed CSM Web Applications.
- **System Restore**: The System Restore tool is a stand-alone database tool that allows a system administrator to import the CSM database for the first time or reload the CSM database from an archive file (.czar file).
- **System Upgrade**: The System Upgrade tool is a stand-alone database tool that allows a system administrator to upgrade a CSM database to a new version.
- **Test LDAP Tool**: Test LDAP is a stand-alone diagnostics tool that allows system administrators to test their LDAP settings.
- **Outlook® Add-In**: The CSM Outlook® Add-In is a CSM client that enables you to interact with CSM Business Object records directly from within Microsoft® Outlook®.