



CSM 2022.3 Upgrade Guide

Legal Notices

© 2023 Cherwell Software, LLC. All Rights Reserved.

Cherwell, the Cherwell logo, and mApp are trademarks owned by Cherwell Software, LLC and are registered and/or used in the United States and other countries. ITIL® is a registered trademark of AXELOS Limited. All other product or company names referenced herein are used for identification purposes only and are or may be trademarks or registered trademarks of their respective owners.

Some or all parts of the mApp product are covered by one or more claims of U.S. Patent No. 9, 612, 825.

The information contained in this documentation is proprietary and confidential. Your use of this information and Cherwell Software products is subject to the terms and conditions of the applicable End-User License Agreement and/or Nondisclosure Agreement and the proprietary and restricted rights notices included therein.

You may print, copy, and use the information contained in this documentation for the internal needs of your user base only. Unless otherwise agreed to by Cherwell and you in writing, you may not otherwise distribute this documentation or the information contained here outside of your organization without obtaining Cherwell's prior written consent for each such distribution.

The Cherwell Software product suite includes:

- Cherwell Service Management
- Cherwell Asset Management

[Contact Cherwell Software](#)

Contents

Upgrade CSM.	4
◦ Upgrade Considerations for CSM 2022.3.	5
◦ The Upgrade Process.	6
◦ Upgrading Remote Servers.	8
◦ System Upgrade Tool.	9

Upgrade CSM

On-premises customers use distinct installers to upgrade the CSM server, web applications, and client components. Then, they use the Auto-Deploy installation tool to automatically deploy pre-configured client installations and connections to client machines.



Note: SaaS customers should contact Cherwell Support for upgrade guidance.

Before you upgrade CSM, take steps to learn about important changes in the new release. For example, you should:

- Verify that your system meets the [System Requirements](#).
- Read the [upgrade considerations](#) for information about upgrading from previous versions of CSM.
- Read the [upgrade process steps](#) to help plan your upgrade.
- Read the [Release Notes](#) to learn about changes made in the latest CSM version.

Related concepts

[Upgrade Considerations for CSM 2022.3](#)

[The Upgrade Process](#)

Related information

[csm_system_requirements.xml](#)

[release_notes.xml](#)

Upgrade Considerations for CSM 2022.3

Find important information to help plan your upgrade to the latest version of CSM.



Attention: We no longer support releases older than CSM 10.0.0.

Upgrade Considerations for Earlier Versions

- [CSM 10.4.0](#)
- [CSM 10.4.0](#)
- [CSM 10.2.2](#)
- [CSM 10.2.0](#)
- [CSM 10.1.0](#)
- [CSM 10.0.0](#)
- [CSM 9.7.0](#)
- [CSM 9.6.0](#)
- [TCP to HTTPS Conversion Process from CSM 9.5.0 and Earlier](#)
- [Upgrade Considerations for CSM 8.00 to 9.5.x](#)
- [Upgrade Considerations for Globalization](#)

Related concepts

[The Upgrade Process](#)

[Revision History](#)

Related information

[csm_system_requirements.xml](#)

[release_notes.xml](#)

The Upgrade Process

Learn the recommended process for upgrading all CSM components. We recommend that you upgrade all components at the same time.



Note: If you make changes in Overwatch just prior to upgrading, restart IIS to ensure your updates are preserved.



Important: For on-premise customers, if the version you're upgrading from is prior to CSM 9.6.3, you'll need to follow a stepped approach for the upgrade. For more information, see the [stepped upgrade guide](#).

Task	Notes
1. Prior to upgrade, stop all CSM Services.	<p>For on-premise customers only, use the Cherwell® Server Manager or the Configuration Command Line Utility to stop the Cherwell® Application Server, IIS, and the Cherwell® Service Host. See Application Server Command-Line Options and CherwellMQS Command Line Options.</p> <p>Use the Windows Services Manager or the Configuration Command Line Utility to stop the Cherwell® Message Queue Service.</p>
2. Upgrade the Cherwell server.	Follow the steps to Run the Server Installation .
3. Configure the server connection.	<p>Perform this task when prompted by the server installation.</p> <p>Follow the steps to Configure the Server Connection.</p>
3. Upgrade the web applications.	Follow the steps to Run the Web Applications Installation .
4. Configure Auto-Deploy during the upgrade of the web applications.	<p>This task is only required if Auto-Deploy was not configured during the original installation of CSM.</p> <p>Follow the steps for Configuring Auto-Deploy.</p>

Task	Notes
5. Upgrade remote instances of server applications.	<p>This includes the Cherwell Service Host and all Trusted Agents Servers.</p> <p>Follow the steps in Upgrading Remote Servers.</p>
6. Reboot the installation server.	<p>If you installed CSM and Portal and Browser Apps on different servers, reboot both servers.</p>
7. Restart all CSM services.	<p>Use the Cherwell Server Manager to start the Cherwell Application Server and the Cherwell Service Host.</p> <p>Use the Windows Services Manager or the Configuration Command Line Utility to start the Cherwell Message Queue Service.</p>
8. Run Auto-Deploy or manually upgrade Desktop Clients.	<p>Follow the steps to Use Auto-Deploy or Run the Client Installation.</p>
9. Instruct CSM web application users to clear their browser cache.	<p>This includes the CSM Portal, CSM Browser Client, and the Cherwell® REST API Discovery Tool.</p>

Related concepts

[Upgrade Considerations for CSM 2022.3](#)

Related information

[configure_the_application_server.xml](#)

[connections.xml](#)

[configuring_auto-deploy.xml](#)

Upgrading Remote Servers

If you install CSM server applications on remote servers, you must upgrade each server application when you upgrade CSM. This includes the Cherwell Service Host and all Trusted Agents Servers.

For best results, follow this process to upgrade CSM server applications on remote servers:

1. Stop all CSM services on the remote machine. For example:
 - Use the Server Manager or the Configuration Command Line Utility to stop the Application Server and the Cherwell Service Host. See [Application Server Command Line Options](#) and [CherwellMQS Command Line Options](#).
 - Use the Windows Services Manager or the Configuration Command Line Utility to stop the Cherwell Message Queue Service (CherwellMQS).
 - If you use Trusted Agents, stop the Trusted Agents Service on all servers on your network.
2. Perform the CSM Server upgrade.
3. Perform the upgrade for the CSM server application on the remote machine. For example, run the [Trusted Agents Server installer](#) on a server on the same network as your private resource.
4. Start the server application service on the remote machine.
5. Test the connection between CSM and the CSM server applications on remote servers. For example, use the [Trebuchet.ServerConfigTool.exe](#) file on the remote server to test the connection between Trusted Agents Hub and the Trusted Agents Server.



Note: You must upgrade all Trusted Agents Servers so they are compatible with the version of CSM running the Trusted Agents Hub. Incompatible versions are logged to the Trusted Agents Server log. For more information, see [Trusted Agents Logging](#).

Related concepts

[Upgrade Considerations for CSM 2022.3](#)

[The Upgrade Process](#)

Related information

[clc_cherwellmqms.xml](#)

[install_the_trusted_agents_server.xml](#)

[configure_the_trusted_agents_server.xml](#)

System Upgrade Tool

The System Upgrade tool allows a system administrator to upgrade a CSM database to a new version. This program usually runs automatically when a new version of CSM is loaded.

There are some systematic windows that might populate as the system runs the update. You are not required to do anything when these windows open.

The System Upgrade tool (accessed from the Cherwell Service Management installation directory) should only be used if the database was not upgraded as part of an application upgrade or an installation.



Note: Only users with appropriate permissions can use the System Upgrade tool.

To upgrade a database:

1. Open the System Restore tool (**Start > All Programs > Cherwell Service Management > Tools > System Upgrade**).

The **Connect to Service Management - System Upgrade** window opens.

2. Select the database to upgrade.
3. Select **OK**.

The **System Upgrade** window opens to verify the upgrade.

4. Select **OK**.

The **System Upgrade** login window opens.

5. Provide the user ID and password.
6. Select **OK**.

Related concepts

[Upgrade Considerations for CSM 2022.3](#)

[The Upgrade Process](#)

Related information

[csm_system_requirements.xml](#)

[release_notes.xml](#)