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CSM 9.3.0 Essentials

Legal Notices

The Cherwell Software product suite includes:

- Cherwell Service Management
- Cherwell Asset Management

Contact Cherwell Software

Contents

Essentials

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

What is Cherwell Service Management?

Cherwell® Service Management (CSM) is a configurable, scalable, Out-Of-The-Box (OOTB) service desk solution based on IT Service Management (ITSM) best practices and the ITIL framework.

At a high level, CSM includes:

- **Applications:** CSM provides a suite of Client applications (Desktop, Browser, and Mobile), Supporting applications (utilities to help enhance functionality), CSM servers (services that facilitate operations and automation), and Web applications (applications to help you access CSM functionality using a browser).

- **Features:** CSM provides a variety of configurable service desk features, including Business Objects, Dashboards, One-Steps/Actions, Searching, Reporting, and Knowledge. CSM also provides powerful Administrative features, such as Blueprints (for configuring and test-driving system definitions), comprehensive Security, automation tools, and integrations.

- **Processes:** CSM provides multiple configurable processes to help you log and manage service desk records. Examples include Incident/Service Request Management, Service Portfolio/Service Catalog Management, Problem Management, Service Asset and Configuration Management (CMDB), Change Management, and Knowledge Management. In addition to the core processes, CSM also offers the ability to quickly merge and integrate additional processes through Cherwell mergeable applications (mApps) (ex: Survey Template, IT Project Tracking, Release, etc.) and integrations.

Processes
- ❑ Incident/Service Request Management
- ❑ Service Portfolio/Service Catalog Management
- ❑ Problem Management
- ❑ Service Asset and Configuration Management (CMDB)
- ❑ Change Management
- ❑ Knowledge Management

Security
- ❑ Security Groups
- ❑ Roles
- ❑ Teams/Workgroups
- ❑ Views

Clients
- ❑ Desktop Client
- ❑ Browser Client
- ❑ Customer Portal
- ❑ Cherwell Mobile
- ❑ CSM Administrator

Business Intelligence
- ❑ Dashboards
- ❑ Reports
- ❑ Search Groups
- ❑ Visualizations
- ❑ Metrics

CSM

Record Logging
- ❑ Business Objects
- ❑ Forms and Grids
- ❑ Record Linking
- ❑ Workflow Phases
- ❑ Ownership

Supporting Functionality
- ❑ Searching
- ❑ Reporting
- ❑ Knowledge
- ❑ Calendars
- ❑ E-Mail
- ❑ CMDB
- ❑ Contact Manager
- ❑ Table Management
- ❑ Social Media
- ❑ Integrations
- ❑ mApps
- ❑ Blueprints

Record Handling
- ❑ Status
- ❑ Attachments
- ❑ E-mails
- ❑ Queues
- ❑ Journals (History and Notes)
- ❑ Tasks
- ❑ Escalations
- ❑ Approvals

Automation
- ❑ Actions/One-Steps
- ❑ Alerts and Notifications
- ❑ Automation Processes
- ❑ Scheduler
- ❑ E-Mail and Event Monitor

The Relationship between CSM and ITIL

The CSM out-of-the-box content supports multiple industry-certified ITIL® processes, including:

- **Incident and Service Request Management:** Incident Management is the process responsible for managing the lifecycle of all incidents. The key aim of the incident management is to restore the IT service for the user as quickly as possible. This troubleshooting process is designed on a three-stage basis, as first, second, and third level. CSM Incident Management is the process that ensures that Services are restored as quickly as possible.

- **Problem Management:** Problem management is the process responsible for managing the lifecycle of all problems. Problem management proactively prevents incidents from happening and minimizes the impact of incidents that cannot be prevented. CSM Problem Management is the process that ensures that the root cause of multiple Incidents is resolved as quickly as possible.

- **Change Request Management:** Change management is the process responsible for controlling the lifecycle of all changes, enabling beneficial changes to be made with minimum disruption to IT services. CSM Change Management ensures that Changes are recorded, classified, scheduled, implemented, and reviewed to minimize Service disruption to the company.

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

- **Service Portfolio Management:** Service portfolio management is the process responsible for managing the service portfolio. Service portfolio management ensures that the service provider has the right mix of services to meet required business outcomes at an appropriate level of investment. Service portfolio management considers services in terms of the business value that they provide. CSM Service Portfolio Management is the process that allows organizations to create and manage a comprehensive set of Service offerings for Customers.

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

- **Service Level Management:** Service level management is the process responsible for negotiating achievable service level agreements and ensuring that these are met. It is responsible for ensuring that all IT service management processes, operational level agreements, and underpinning contracts are appropriate for the agreed service level targets. Service level management monitors and reports on service levels, holds regular service reviews with customers, and identifies required improvements. CSM Service Level Management is the process that ensures that Service Level Agreements (SLAs) are carried out appropriately.

- **Knowledge Management:** Knowledge Management is the process responsible for sharing perspectives, ideas, experience, and information, and for ensuring that these are available in the right place and at the right time. The Knowledge Management process enables informed decisions, and improves efficiency by reducing the need to rediscover Knowledge. CSM Knowledge

Management is the process that ensures that all Knowledge in your CSM Knowledge Base is efficiently gathered, approved, stored, and shared with Users and Customers. In CSM, Knowledge is stored mainly in Knowledge Articles (KAs) but can come from other Knowledge Sources as well, including Business Object records, Attachments, and Web sources (ex: Google or YouTube).

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

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

The Relationship between CSM and SIAM

Multi-Sourcing Service Integration (MSI) and Service Integration and Management (SIAM) are approaches used to manage the delivery of Services using multiple Suppliers. Using these approaches, IT Managers can coordinate multiple Suppliers (internal and external), available Services, and potential risks, while hiding the complexity of the process from Customers by providing a streamlined experience.

The CSM out-of-the-box content supports multiple processes related to MSI/SIAM, including:
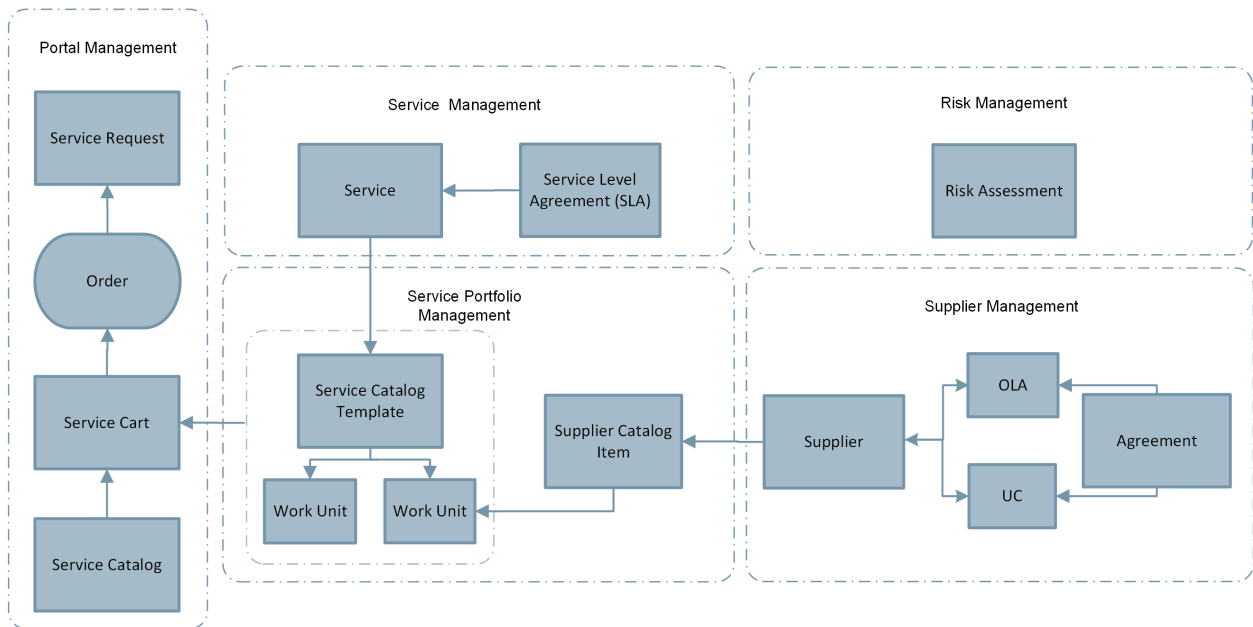
- **Supplier Management:** Supplier management is the process responsible for obtaining value for money from suppliers, ensuring that all contracts and agreements with suppliers support the needs of the business, and that all suppliers meet their contractual commitments. CSM Supplier Management is the process that allows Users to onboard and offboard multiple Suppliers (internal and/or external) and manage their individual lifecycles, which includes defining information, creating Agreements, and assessing performance. Business Objects that support Supplier Management include Scorecard, Supplier, and Agreement.

- **Risk Management:** Risk Management is the process responsible for identifying, assessing and controlling risks. CSM Risk Management is the process that allows organizations to minimize Risks associated with Suppliers by defining and tracking factors that could affect the delivery of a Service. The Business Object that supports Risk Management includes Risk Assessment.

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

- **Service Portfolio Management:** Service portfolio management is the process responsible for managing the service portfolio. Service portfolio management ensures that the service provider has

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

- **Portal Management:** CSM Portal Management is the process that allows an organization to manage and deliver products or Services that are ordered by Customers using the Service Catalog in the Customer Portal. Business Objects that support Portal Management include Service Catalog and Service Cart.

The Difference between Out-of-the-Box Content and Platform

CSM installations provide two separate layers of data, including:

- **Platform:** Underlying layer of CSM that sits on top of the SQL server and provides the tools (ex: Form Editor, Automation Processes, Widgets) used to create and customize the functionality and design (ex: Form layout, process workflow, Dashboard display) of your CSM system. The platform can be upgraded without affecting your data using the System Upgrade tool.

- **Out-of-the-Box (OOTB) Content:** Predefined functionality and design (ex: Form layout, process workflow, Dashboard display) that is applied with new installations on top of the platform. Typically, system administrators modify the out-of-the-box content to fit the needs of their organization. OOTB content cannot be upgraded without overwriting existing data, but system administrators can apply new functionality to their system either manually or using mergeable applications (mApps).
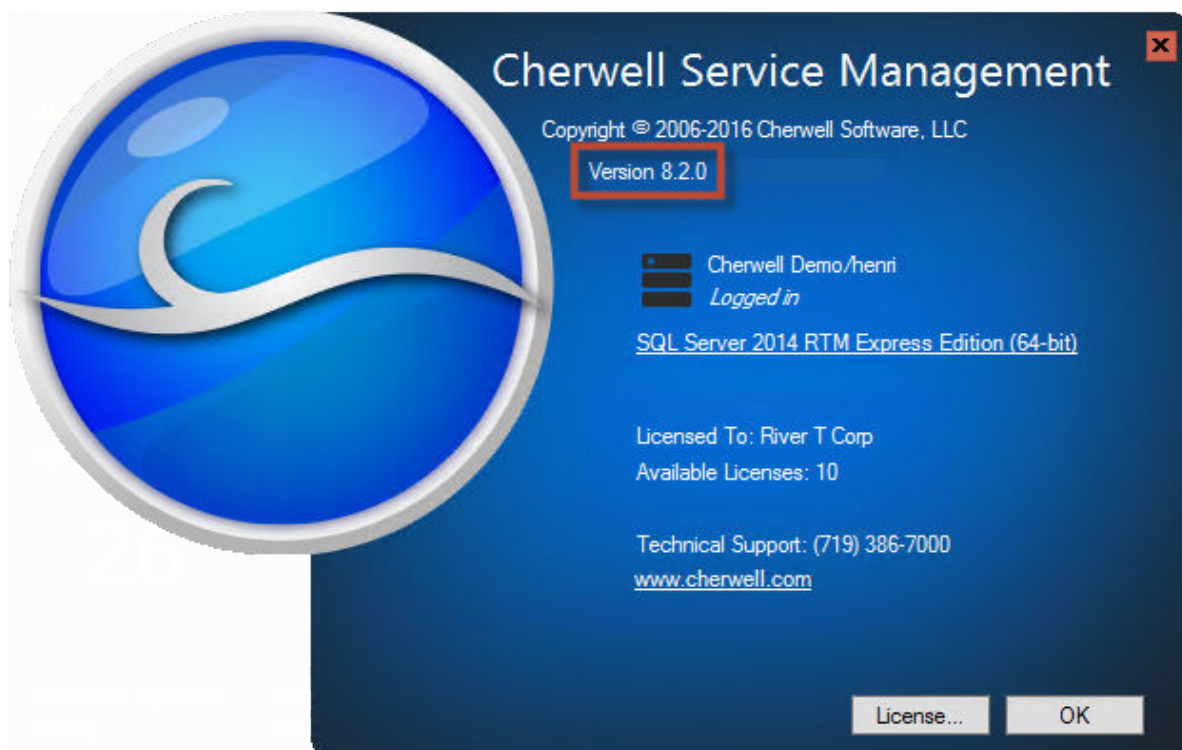
The following figure shows the three layers of CSM:
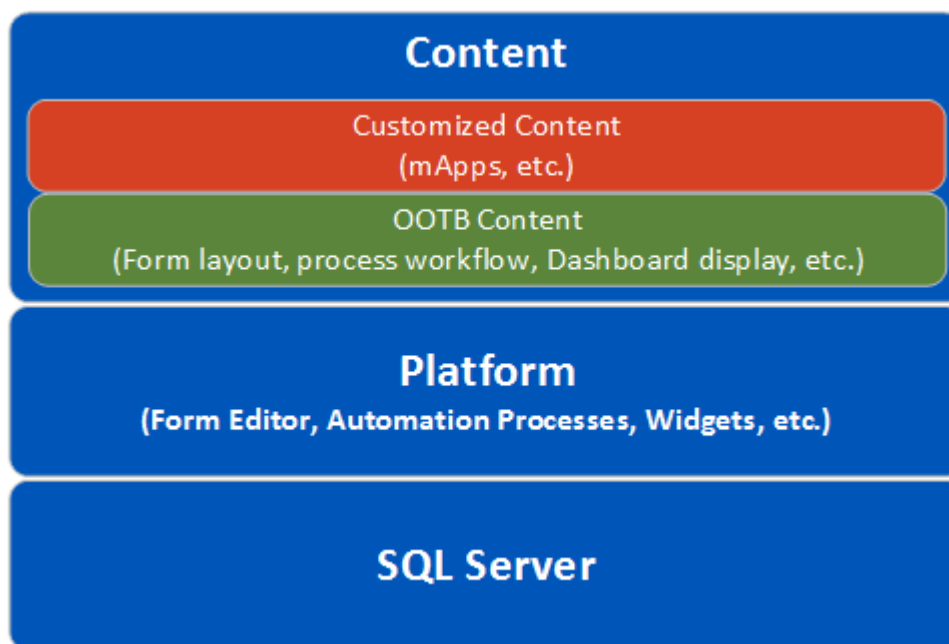
Find the CSM Platform Version

To determine which platform version you are using:

1. On the CSM Desktop Client menu bar, click **Help>About**.
   The version number displays in the window.

Find the CSM OOTB Content Version

To determine which OOTB content version you are using:

1. In CSM Administrator, create a Blueprint.

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

3. Click the **Blueprint** scope.

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

Name:	Content Version
Description:	DO NOT MODIFY! Used by Cherwell for diagnostic purposes.
Type:	Text
Value:	8.2.0_06.30.16_013-en

☐ Value is user-specific

    ☐ Remember the user specific values between sessions

[Options...]   [OK]   [Cancel]

Note: Do not edit the Value field. While the Content Version Stored Value is only available to CSM Administrators, it is not secure.

CSM Applications

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

Applications include:

- **Clients**: Desktop (CSM Desktop Client and CSM Administrator), and Browser Client.
- **Supporting applications**: Outlook Add-In, Dashboard Viewer, Report Runner, Auto-Deploy, Definition Editor, Server Manager, Service Monitor, System Restore, System Upgrade, and Test Lightweight Directory Access Protocol (LDAP).
- **Servers (services)**: Application Server, Automation Process Server, E-mail and Event Monitor Server, and Scheduling Server.
- **Web Applications**: Browser Client, Portal, Cherwell REST API, Cherwell Web Service (Web API), Auto-Deploy (Web Page), Web-Forms, and Service Monitor (Web Page).

CSM Clients

The CSM suite includes the following Clients:

- **CSM Desktop Client:** The CSM Desktop Client is the main application in the CSM suite. The Client runs under Microsoft® Windows®, and provides all the features and default Business Objects/processes for service desk professionals to effectively and proactively manage their support desks.

- **CSM Browser Client:** The CSM Browser Client is a web application that enables Users to access most of the features available from the CSM Windows-based Desktop Client using a browser. The CSM Browser Client supports most major modern browsers on desktop machines and tablets.

- **CSM Customer Portal:** The CSM Customer Portal is a highly configurable web application that enables Customers to securely and conveniently access their CSM data (ex: Incidents, company news, documents, the Service Catalog, etc.) using a browser. A Portal supports multiple sites (for different types of Users), and also allows managers to access their Team's data.

- **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.

CSM Supporting Applications

The CSM suite includes the following Supporting applications:

- **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®.
- **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:** Cherwell 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.
- **Definition Editor:** The Definition Editor is a stand-alone tool that allows advanced Users to clear demo content from a database and search through definitions and make changes that cannot be made in the application.
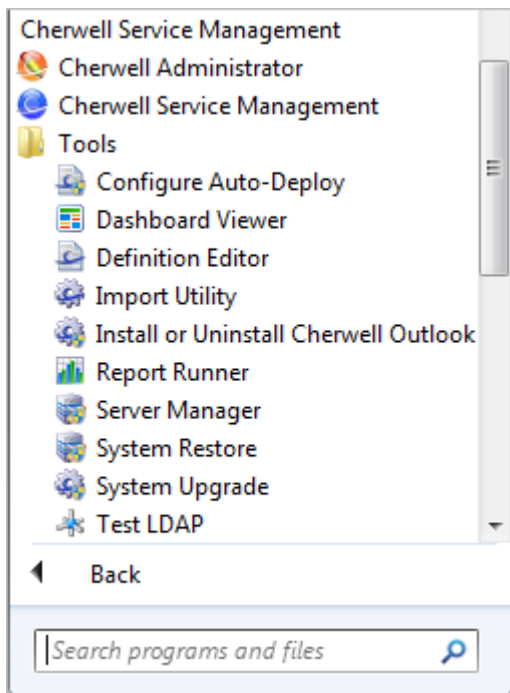
  > **CAUTION:** This is a powerful tool and should only be used if working with the Cherwell Support Team to accomplish advanced troubleshooting or configuration objectives. Please contact the Cherwell Professional Consulting Services team at support@cherwell.com for advanced configurations.

- **Server Manager:** The Server Manager is a stand-alone tool that allows system administrators to efficiently monitor, manage (start, stop, or restart), and configure (database connections, login authentication, logging, etc.) the CSM Servers (services), and restart some managed CSM Web Applications.
- **Service Monitor:** The Service Monitor is a stand-alone Web Application that allows system administrators to remotely monitor and manage (start, stop, and restart) CSM Servers (services) and Web Applications and restart IIS, using a browser and an IIS-hosted web page. Service Monitor is installed using a stand-alone installer and is deployed using the Service Monitor web page.
- **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.

Most Supporting applications can be accessed from the Cherwell Service Monitor Tools folder. Exceptions include Supporting Web Applications (ex: Service Monitor), which are accessed via a browser.

Cherwell Service Management
Cherwell Administrator
Cherwell Service Management
Tools
    Configure Auto-Deploy
    Dashboard Viewer
    Definition Editor
    Import Utility
    Install or Uninstall Cherwell Outlook
    Report Runner
    Server Manager
    System Restore
    System Upgrade
    Test LDAP

◀   Back

Search programs and files

CSM Servers (Services)

The CSM Servers are Microsoft Windows® Services (processes) dedicated to particular tasks. These services run in the background while monitoring for, and accepting, requests from CSM Clients. The available CSM Servers (Services) are:

- **Application Server:** The Cherwell Application Server is a CSM Service that runs programs and handles application operations between Users and their databases. The Application Server is the middle tier of the Cherwell 3-tier application. Client applications connect to the Application Server (usually using an encrypted TCP connection).

  > **Note:** If the Application Server is installed under IIS, it often displays as *Application Server (IIS)* within the UI. The Application Server shows up as both Windows and IIS hosted service at the same time. Only one is available at a time.

- **Server Farm:** A Cherwell Server Farm is a framework that consists of a load balancer, multiple web servers, SQL Server, and Redis.

- **Automation Process Server:** The Cherwell Automation Process Server (formerly the Business Process Server) is a CSM Service that monitors events and executes background business rules in your system (example: Notifications and escalations). Automation Processes are configured in CSM Administrator.

- **E-mail and Event Monitor Server:** The Cherwell E-mail and Event Monitor Server is a CSM Service that automatically monitors e-mail accounts and event streams, and then performs specified actions, such as creating or modifying records based on e-mail content or event details. In addition to connecting to the database server, it also has to be able to talk to the mail server (example: Microsoft Exchange).

- **Scheduling Server:** The Scheduling Server is a CSM Service that executes actions or activities, such as imports and reports, on a time-based/recurring basis. Predefined actions are scheduled in CSM Administrator and run by the service (example: A system backup can be scheduled to occur at a set time every night).

CSM Web Applications

The CSM Web Applications are applications that are designed to be accessed by most modern browsers (Firefox®, Chrome™, Internet Explorer®, etc.) from various desktop or tablet machines. All the Web Applications are hosted in Microsoft® IIS. The CSM suite contains the following Web Applications:

- **Browser Client (Web Application)**

  The CSM Browser Client is a web application that enables Users to access most of the features available from the CSM Windows-based Desktop Client using a browser. The CSM Browser Client supports most major modern browsers on desktop machines and tablets.

- **Customer Portal (Web Application)**

  The CSM Customer Portal is a highly configurable web application that enables Customers to securely and conveniently access their CSM data (example: Incidents, company news, documents, the Service Catalog, etc.) using a browser. A Portal supports multiple sites (for different types of Users), and also allows managers to access their Team's data.

- **Cherwell REST API**

  The Cherwell REST API provides programmatic access to many CSM functions via an HTTP-based RESTful API. Methods are available for finding, creating, and updating Business Objects; finding and running saved Search queries; managing users; and more. Comprehensive API documentation is available in the Cherwell REST API Discovery Tool, which enables you to discover and test methods using your CSM data.

- **Cherwell Web Service (Web API)**

  The Cherwell Web Service (CWS) is an API for communicating with CSM using Simple Object Access Protocol (SOAP) over HTTP. CWS must be running for the Mobile applications to operate, and is also required for a number of other features (RSS feeds, SAML security access, Bomgar® integration, etc.).

- **Auto-Deploy (Web Page)**

  The Auto-Deploy is a Web page where first-time users of CSM can go to download, and then automatically install and configure, the most recent version of CSM Applications. The system administrator configures the available installation options using the Auto-Deploy Configuration Utility. Once installed, CSM automatically detects new software versions, and then downloads and installs the most recent version from the Auto-Deploy site.

- **Web-Forms™ (Web Application)**

  Cherwell Web-Forms™ is a browser-based application that allows Users to enter, view, and edit CSM Business Objects over the web without having to log in (example: Surveys, registration, ordering, etc.). This tool also allows for the remote execution of One-Steps.

- **Service Monitor (Web Page)**

The Service Monitor is a stand-alone Web Application that allows system administrators to remotely monitor and manage (start, stop, and restart) CSM Servers (services) and Web Applications and restart IIS, using a browser and an IIS-hosted web page. Service Monitor is installed using a stand-alone installer and is deployed using the Service Monitor web page.

CSM Features

CSM provides a number of configurable key features to help you manage and run your service desk.

Features include:

- Business Objects (including Forms and Grids)
- Dashboards and Widgets
- One-Steps/Actions
- Searching (including Quick Search and Search Groups)
- Reporting
- Knowledge

Additional features include:

• Approvals	• Metrics
• Attachments	• Modifiers
• Business Hours	• Queues
• Calendars	• Record Locking
• Document Repositories	• Rich Text
• E-mail	• Table Management
• Formats	• Tasks
• HTML Pages	• Themes
• Item Managers	• Tokens (Counters, Prompts, Stored Values, System Functions)

• Journals	• Visualizations

CSM also provides powerful Administrative features that help you install, configure, secure, automate, and extend/integrate your system, including:

• Installation	• Automation Tools (Scheduler and Automation Processes)
• Security (Security Groups, Roles, Teams and Workgroups, Users, and Customers)	• Server Tools
• Blueprints	• System Analyzer
• mApps	• Integrations
• Data and Databases	

Record Management

To enable quick deployment and ensure industry best practices, CSM provides an out-of-the-box solution to support the a variety of service desk processes.

OOTB processes include:

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

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

Quick Start Cards

Quick Start Cards (QSCs) provide a short, graphical overview of specific CSM features. You can view Quick Start Cards online or download them for offline use.

English Quick Start Cards

Tours • CSM Desktop • Browser Client • Portal • Reporting • Searching • E-mail • Cherwell Asset Managment (CAM)	**Record Management** • Service Catalog, including Configuration Steps • Log a Normal Change • Log an Incident • Log a Problem • Release Management mApp: Create a Release • IT Project Tracking mApp: Create a Project • Log a Knowledge Article
Configuration • CSM Implementation • Create a Portal • Create a Theme • Create a Dashboard • Create a One-Step • Configure Globalization • Add an Approval to a Business Object • Configuring Field-level Encryption	**Installation** • Install CSM • Configure CSM Connections • Configure Auto-Deploy • Upgrading CSM • Configuring LDAP Authentication
mApp Solutions • mApp Tour • Apply a mApp • Create a mApp	

Translated Quick Start Cards

German	Spanish
• Dashboard erstellen • mApp erstellen • One-Step erstellen • Implementierung von CSM • Aktualisieren von CSM (Upgrades)	• Crear un tablero de resultados • Crear una mApp • Crear un nuevo One-Step • Implementación de CSM • Actualización de CSM
French	**Portuguese**
• Créer un tableau de bord • Créer une mApp • Créer un One-Step • Implémentation CSM • Mise à niveau de CSM	• Criar Painel • Criar um mApp • Criar um One-Step • Implementação do CSM • Atualização do CSM