cherwell®
Acquired by Ivanti

What's New in CSM 9.3.0?

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- Cherwell Service Management
- Cherwell Asset Management

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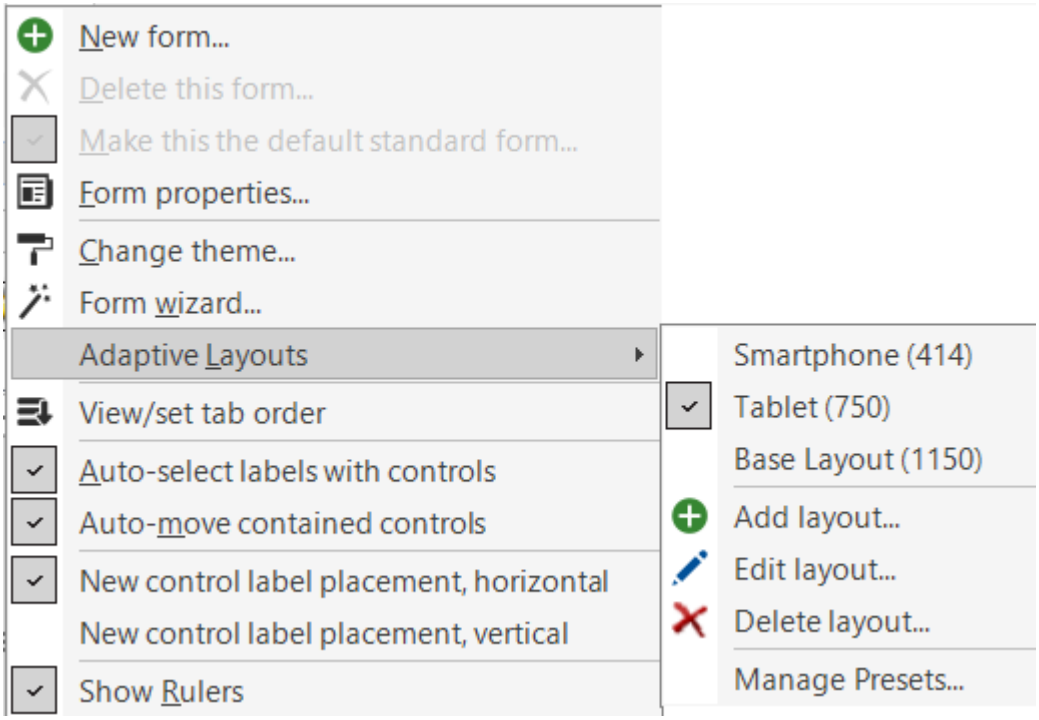
Overview of What's New in CSM 9.3.0

Adaptive Layouts

The new Adaptive Layouts feature allows you to leverage adaptive design for Forms so that your Forms can adapt to different dimensions. Use Adaptive Layouts to design Forms that provide optimal user experiences across a range of devices.

You can use the Adaptive Layout design features to create, edit, or delete Adaptive Layouts within a Form.



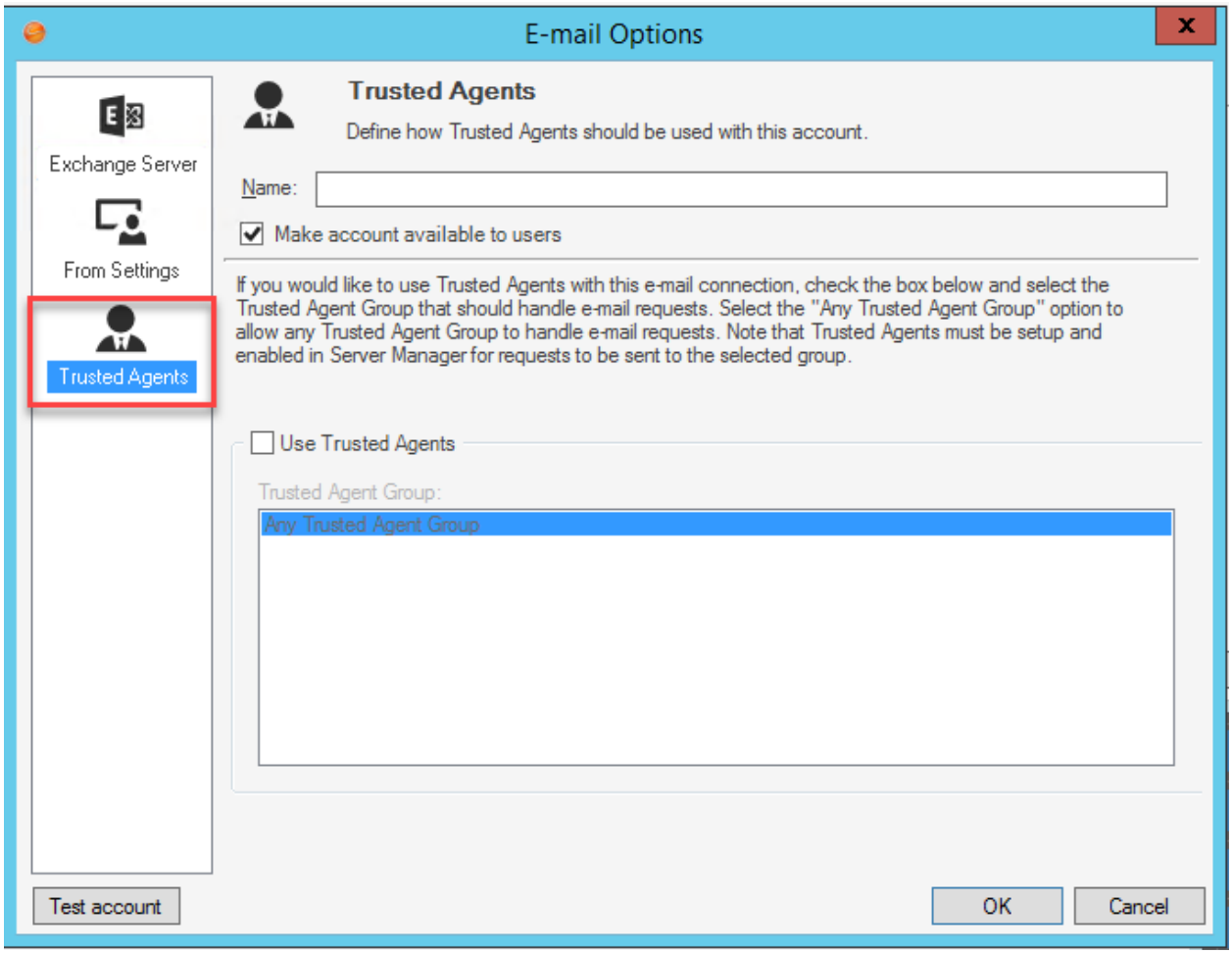
You can also implement Adaptive Layouts with the same dimensions across many Views or Business Objects by using an Adaptive Layout Preset. An Adaptive Layout Preset is a pre-defined set of layout properties that is managed in the Adaptive Layout Preset Manager.

Refer to the Adaptive Forms Scenarios for detailed examples of using adaptive Forms to improve your user experience and streamline your design process.

Trusted Agents for E-mail

CSM now supports the use of Trusted Agents for e-mail.

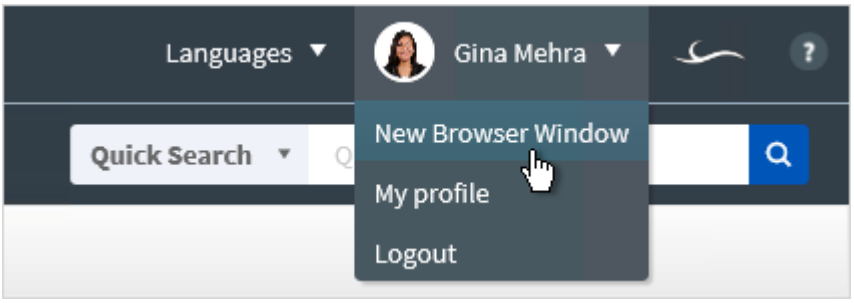
If you have Trusted Agents configured, you can enable Trusted Agents for e-mail in CSM Administrator under the E-mail Options dialog for each e-mail account.



Refer to Using Trusted Agents for E-mail for more information.

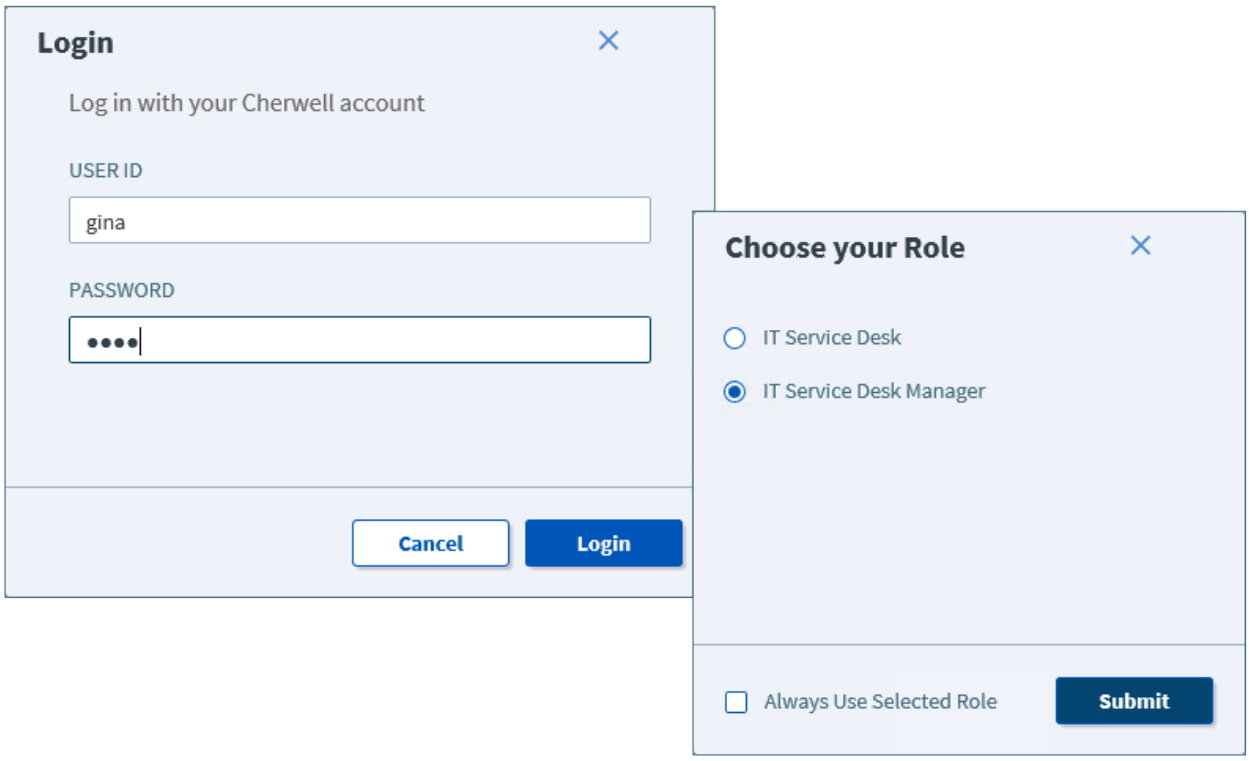
Multi-Tab Browsing Support

The new multi-tab browsing support feature allows Browser Client and Customer Portal Users to operate in multiple web browser tabs, which enables them to work on multiple pages in CSM within the same session. Users who have the Globalization feature enabled are able to open tabs in multiple languages and work in the tabs independently. Easily open new tabs by selecting New Browser Window in the User Information section of the Application Bar.



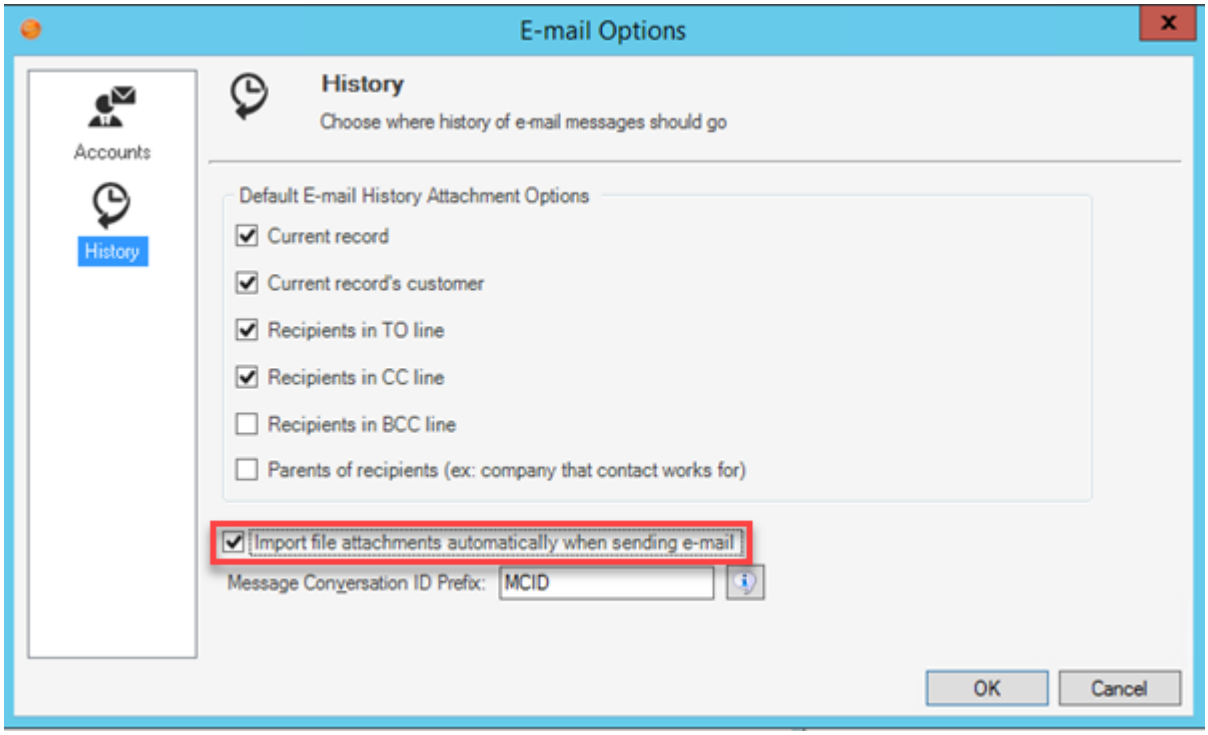
Modal Design Update

The Browser Client and Customer Portal modals have an updated user interface design. The new styling affects fonts, colors, buttons, and message wording (in some instances).



Improved Handling for E-mail Attachments

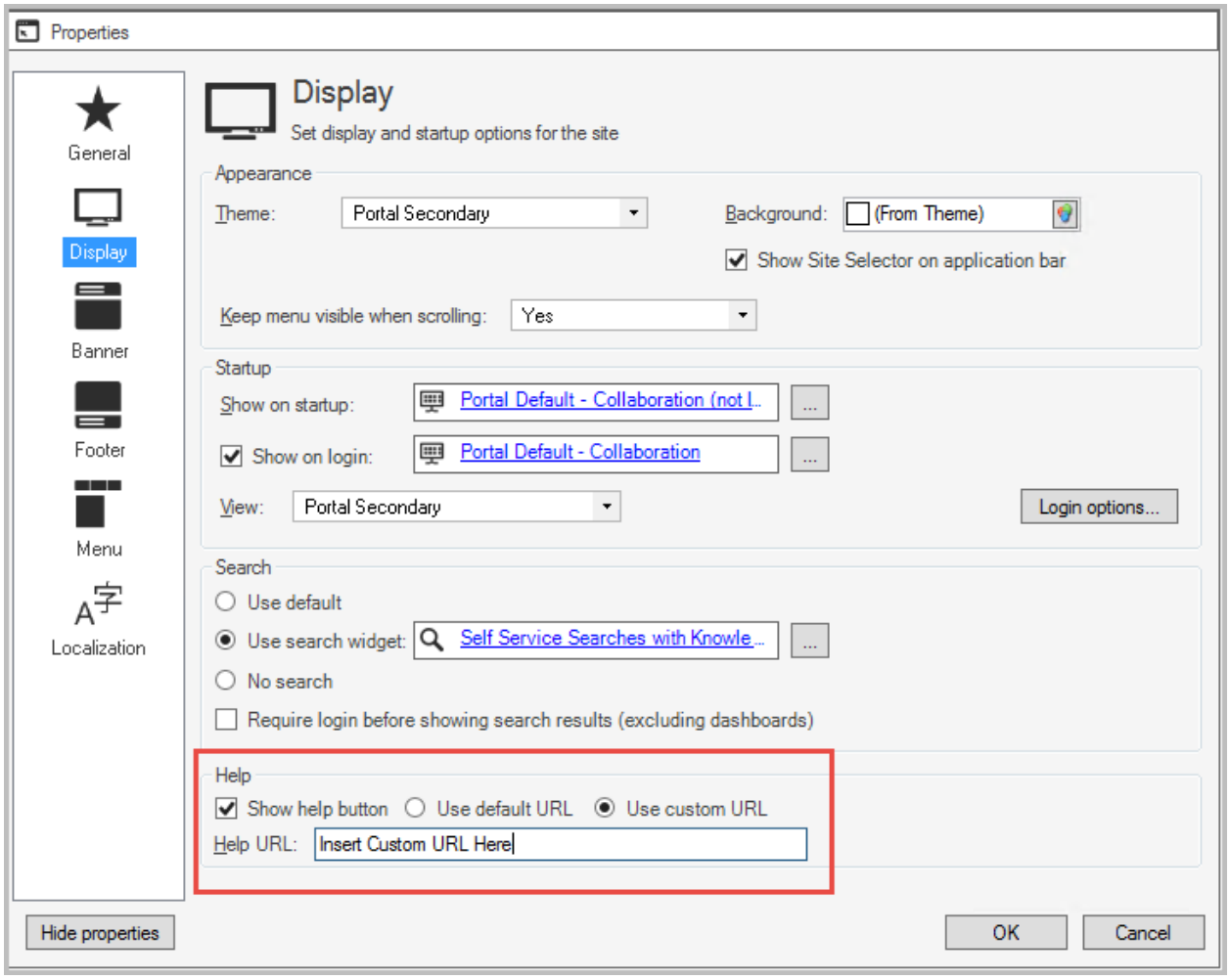
When the **Import file attachments automatically when sending email** checkbox is selected, CSM will now import attachments from e-mails generated via CSM system processes such as One-Steps and Automation Processes. Depending on your system configuration, this could significantly increase the amount of data stored in your database.



Refer to Define Default E-mail History Attachment Options for more information.

Enable or Disable Portal Documentation

By default, the Portal links Users to the Cherwell online documentation system. Due to the highly configurable nature of the Portal, a customer may wish to disable this feature, or link to a custom online documentation system. Use the CSM Administrator and the Site Manager to disable the default online documentation and enable a custom documentation system.



Refer to Enable Custom Portal Documentation for more information.

Enhanced CSV Data Import Functionality

Several enhancements to the CSV Data Import Wizard were added. Users can now use CSV files to:

- Import internal User data
- Import or Update Existing User Records
- Update Business Object data based on a unique key

Use the CSM Administrator to run a one-time import or a stored data import. Refer to Managing CSV Data for more information.

Additional Form Editor Functionality

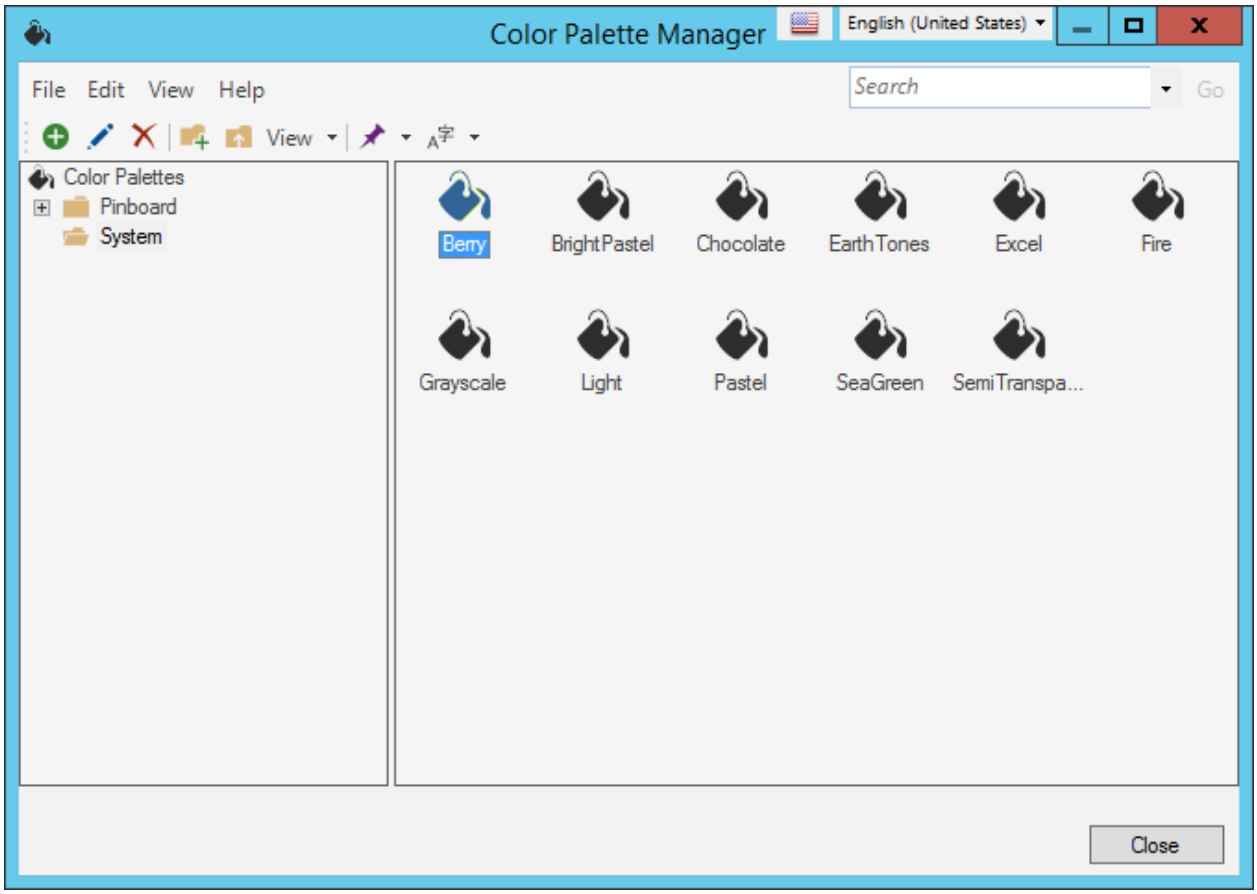
Additional functionality, Snap to Grid and Snap to Guide, were added to the Form Editor toolbar to assist with aligning Widgets to a grid and creating or editing Forms.

- Snap to Grid allows Form controls to be placed and aligned with the help of gridlines.
- Snap to Guide allows Form controls to be aligned to their closest neighbors.

Refer to Form Editor Toolbar for more information.

Create Custom Themes with Color Palette Manager

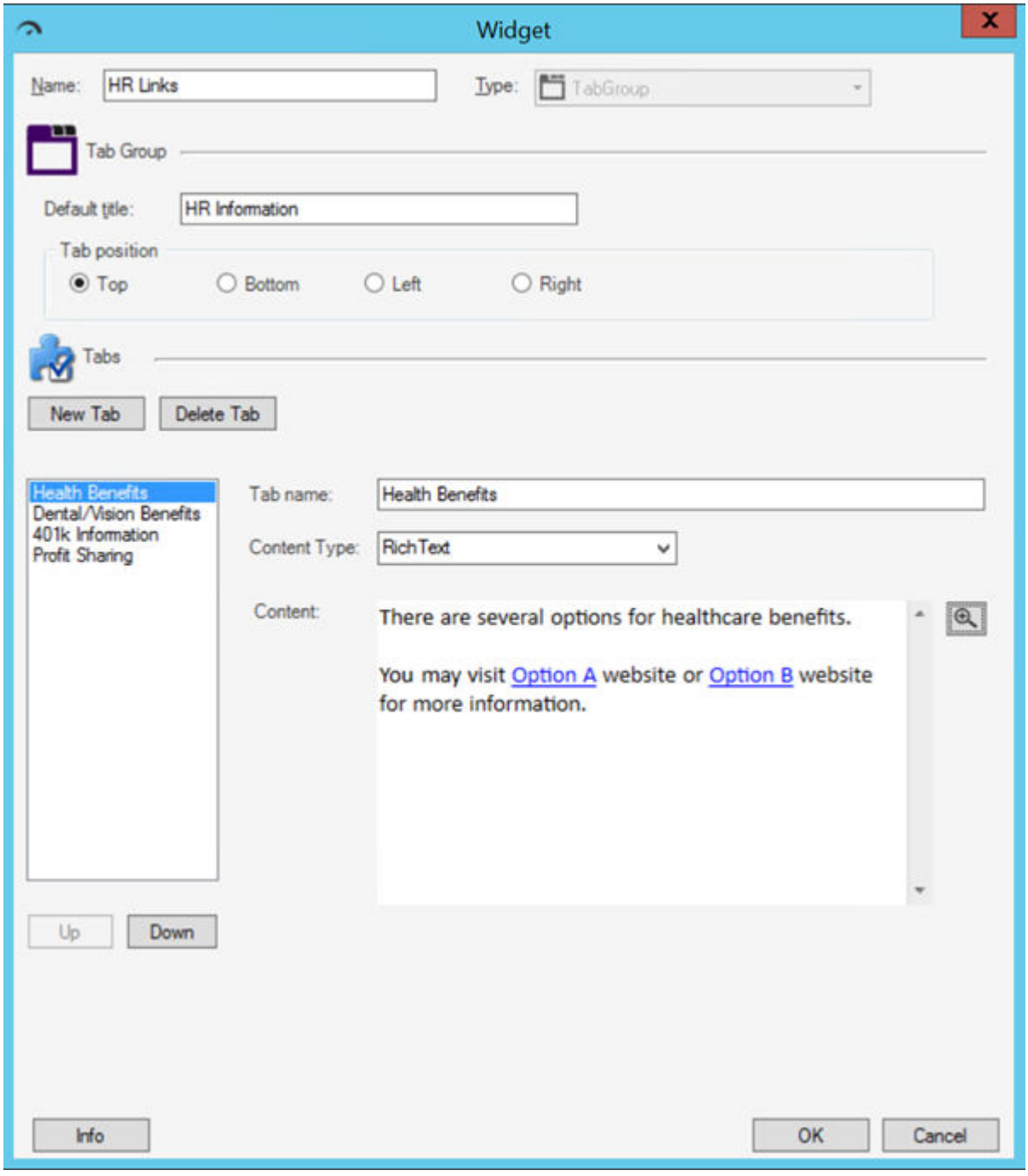
The Color Palette Manager allows Users to create custom Themes for Widgets on Browser Client and Desktop Client Dashboards. Use the Color Palette Manager to create custom Themes that match your company's colors or create department specific Themes.



Refer to Create Custom Color Palettes for more information.

Tab Group Widget

You can now add a Tab Group Widget to your Dashboards. The Tab Group can have an unrestricted number of tabs; tabs can contain plain text or rich text. Use the tabs to display static messages, images, and links.



Refer to Create a Tab Group Widget for more information.

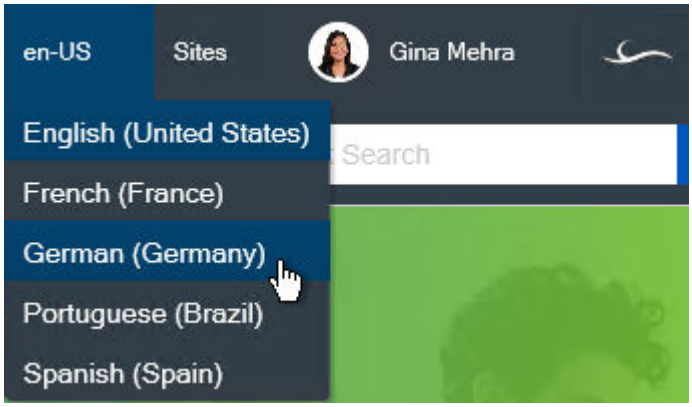
Browser Client and Portal Hamburger Menu

A hamburger menu was added to the Browser Client and Portal to improve the User Experience on mobile screens, as well as screens sized below 768 pixels. The hamburger menu also appears if a browser window is resized below 768 pixels. No configuration is necessary to activate this feature.

Overview of New OOTB Content for CSM 9.3.0

Globalization Enabled by Default

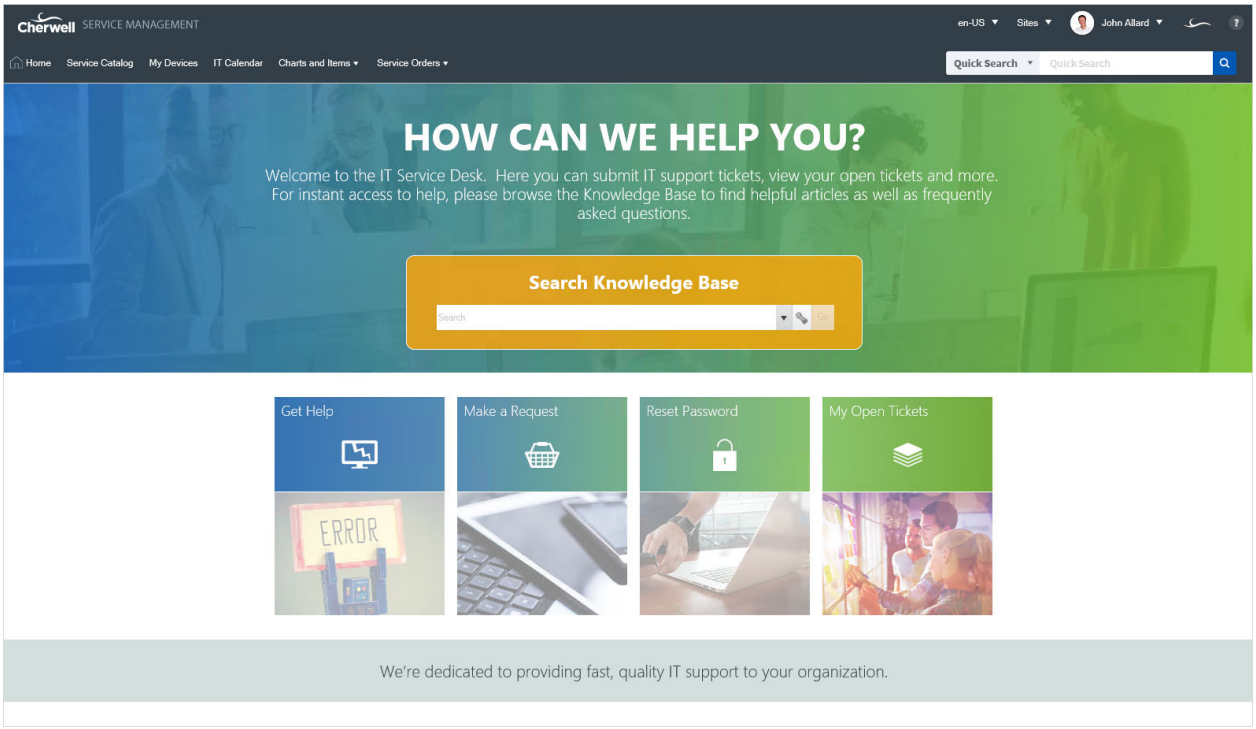
Globalization features, including content strings for German, French, Spanish, and Portuguese, are enabled by default in the Demo Database. This enables the culture selector in all clients. Users can then switch between languages as they work in CSM.



To disable the culture selector, clear the **Enable Globalization** check box on the General tab of the Globalization Management dialog in CSM Administrator.

Customer Portal Dashboard Design

The out-of-the-box (OOTB) IT site on the Customer Portal has an updated user interface design for Dashboards. The design includes changes to background images, fonts, and colors. In some cases, the new design affects the organization of Dashboard Widgets.

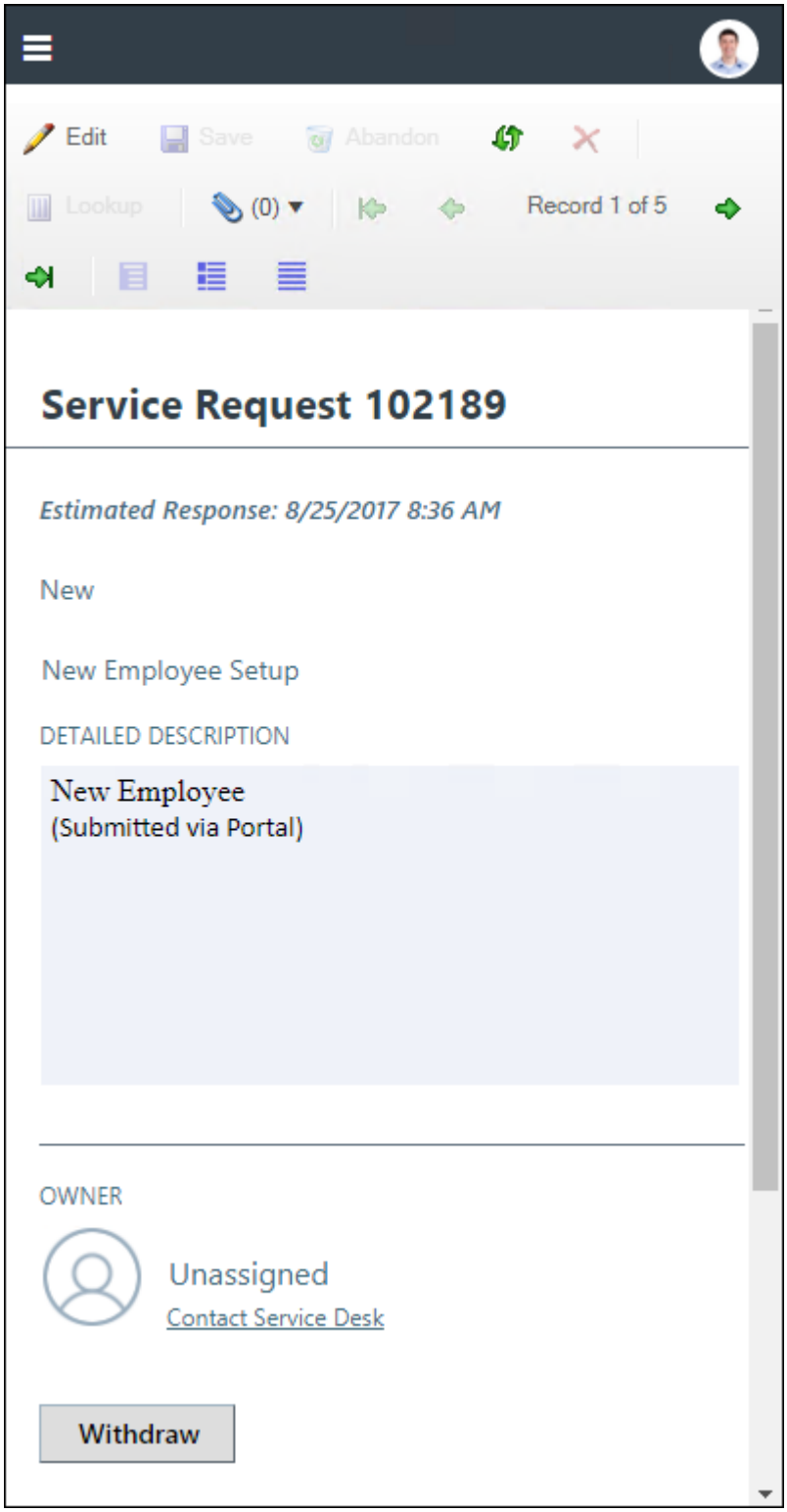


Customer Portal Form Design

The out-of-the-box (OOTB) IT site on the Customer Portal has an updated user interface design for Forms. The design includes changes to background images, fonts, and colors. In some cases, the new design affects the organization of fields on the Forms.

Adaptive Layouts for Portal Forms

With the introduction of the Adaptive Layouts feature, CSM now provides an out-of-the-box (OOTB) Adaptive Layout for most Portal Forms. The layout is designed to work with handheld devices. Portal Forms with the OOTB layout will switch to the smaller layout when CSM detects the screen dimensions of a handheld device.

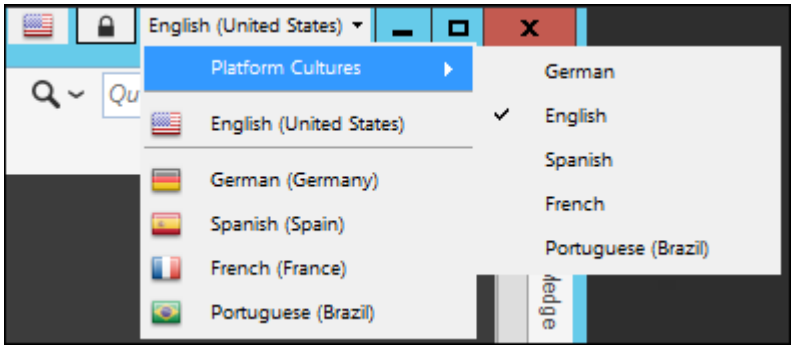

Edit
Save
Abandon
Lookup
(0)
Record 1 of 5
Service Request 102189
Estimated Response: 8/25/2017 8:36 AM
New
New Employee Setup
DETAILED DESCRIPTION
New Employee
(Submitted via Portal)
OWNER
Unassigned
Contact Service Desk
Withdraw

Overview of What's New in CSM 9.2.0

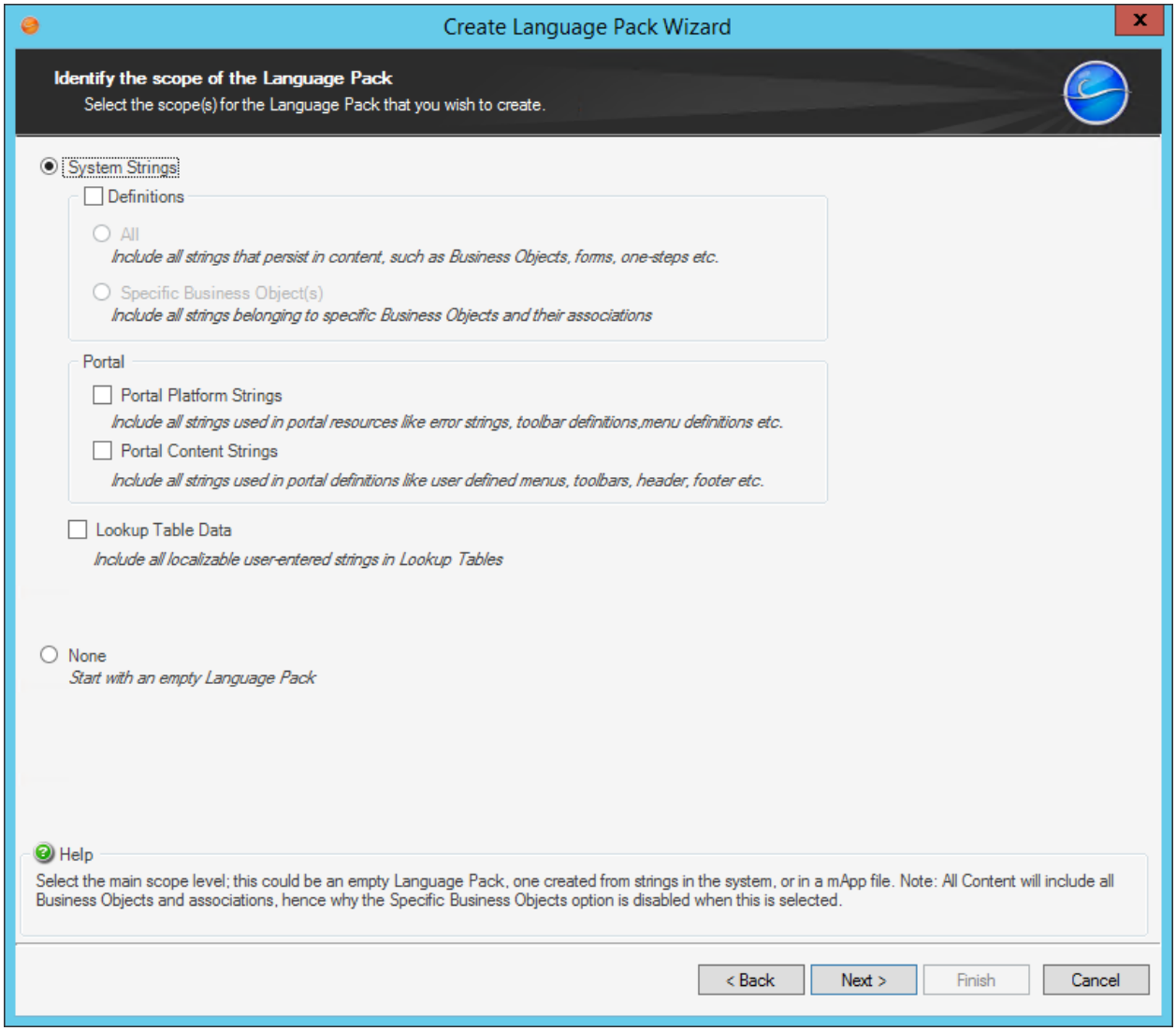
Globalization Management

The new Globalization tool set enables you to quickly and easily translate text, referred to as "strings," into one or more languages. This ensures that Users can use a single CSM installation to view the same content in multiple languages.

The culture selector enables Users to quickly switch between the available languages for content and CSM platform strings. Culture and language pairs can be assigned to specific Users and Roles or across your system.

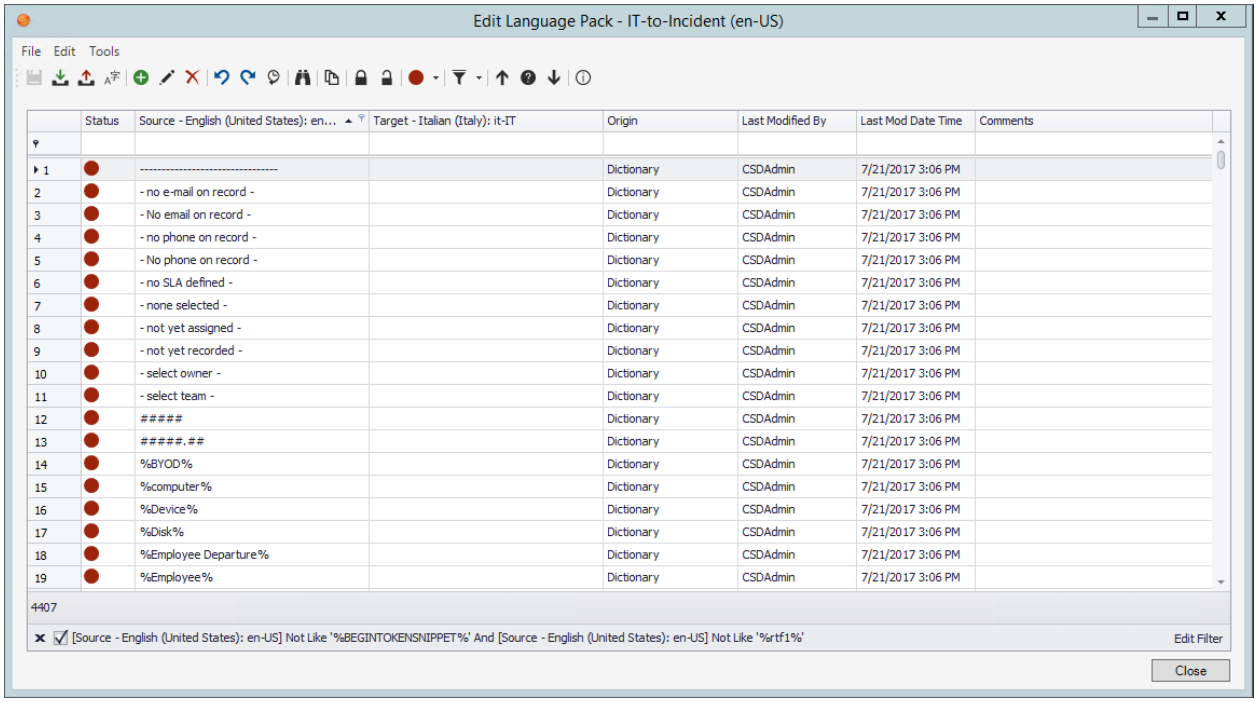


You can create Language Packs to translate strings for all content, specific Business Objects and their associations, Lookup Table data, Portal content, and Portal platform resource strings.



You can choose to:

- Perform Bulk Updates Export a Language Pack, and then send the Language Pack to a translator. After strings in the Language Pack are translated, you can import the file back into your system.
- Perform Updates in the Language Pack Editor Use the Language Pack Editor to translate a small number of strings or modify existing translations.
- Use Machine Translation Apply machine translations to a Language Pack. Currently, the Google Cloud Translator is supported.
- Perform On-the-Fly Updates Translate strings as you manage CSM features, such as Forms, One-Steps, and Expressions. This method is recommended for maintaining an existing translation.



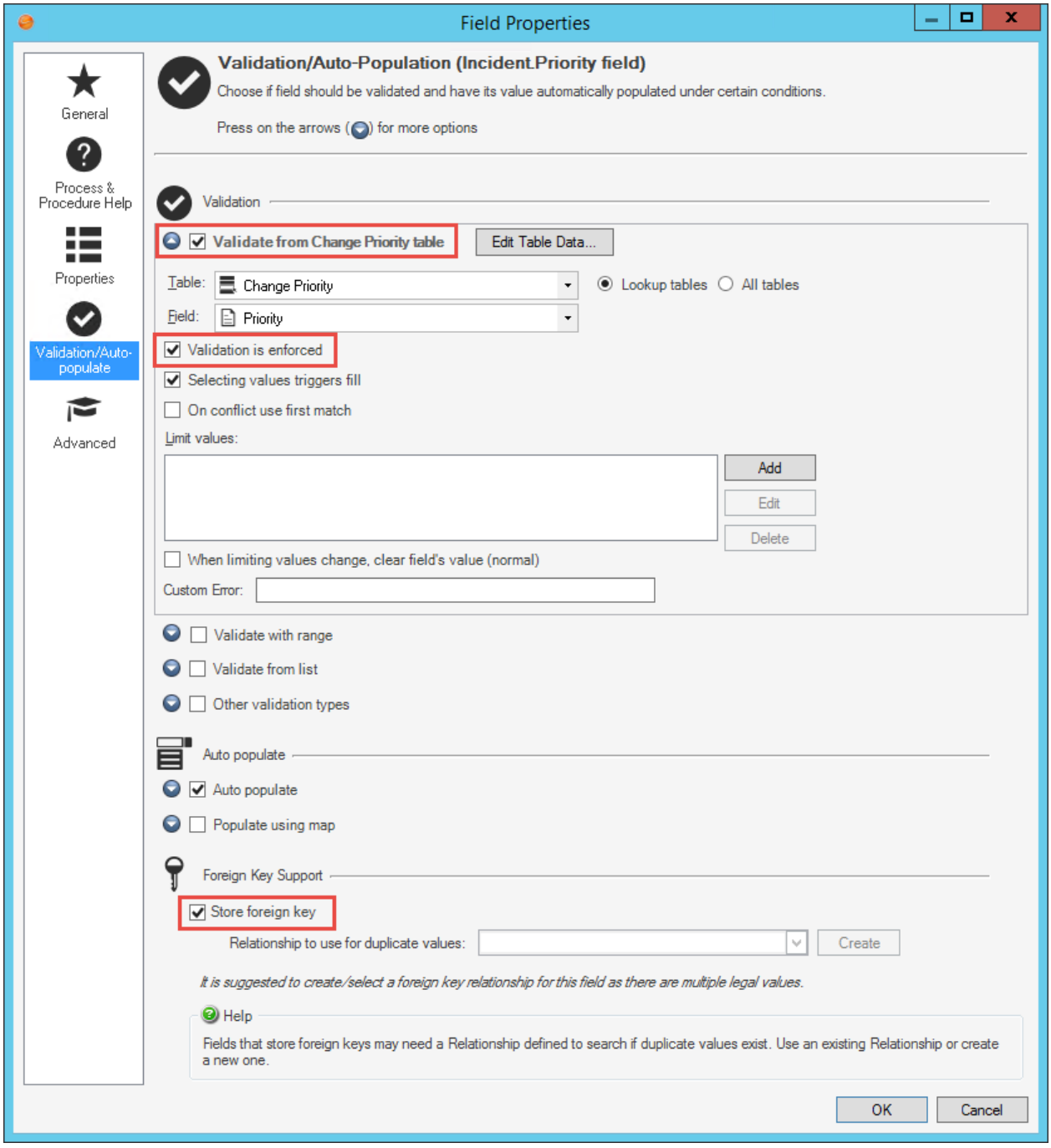
Additional Globalization support includes:

- Translation management of individual definitions in a Blueprint or mApp in CSM Administrator.
- Localization support for Text Fields in Lookup Objects to show translated values to Users as they select, search for, and validate Field values based on their current culture or from other languages enabled in your system.
- On-the-fly record translations.
- Content optimization capabilities that assess your existing system and recommends changes to support content localization.

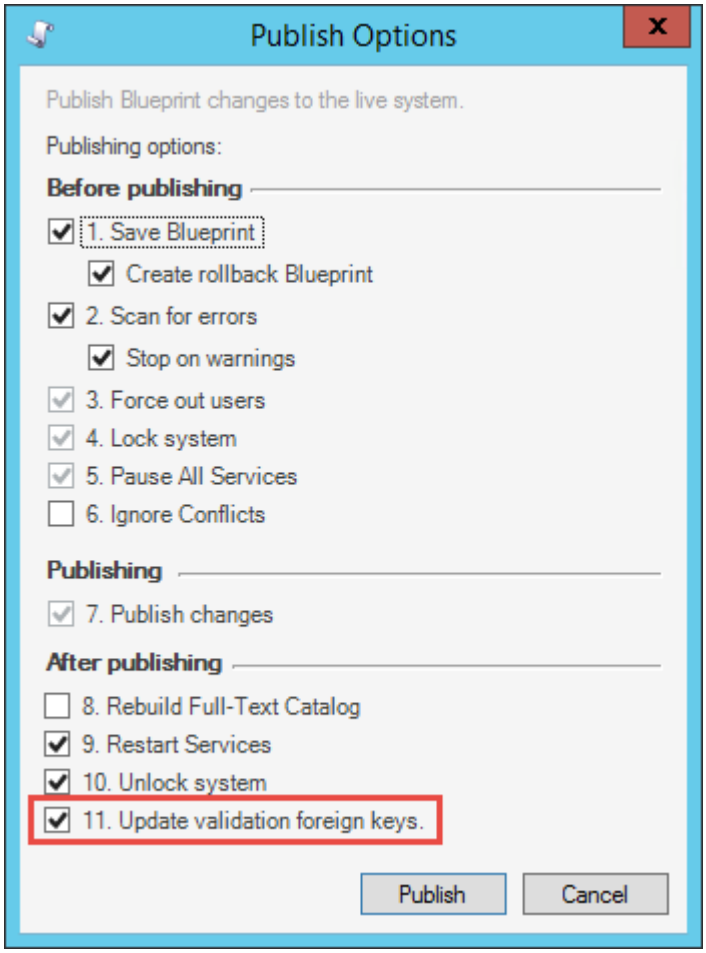
Foreign Key Support for Validated and Auto-populated Fields

You can now store foreign keys for Fields that are validated from Lookup tables and that enforce validation. This ensures that changes to Lookup table values are updated in existing records.

When you enable foreign keys for a Field, the keys also apply to values that are auto-populated from that Field.



In addition, when you publish a Blueprint, you can choose to update foreign keys values. This ensures that values are updated in existing records.

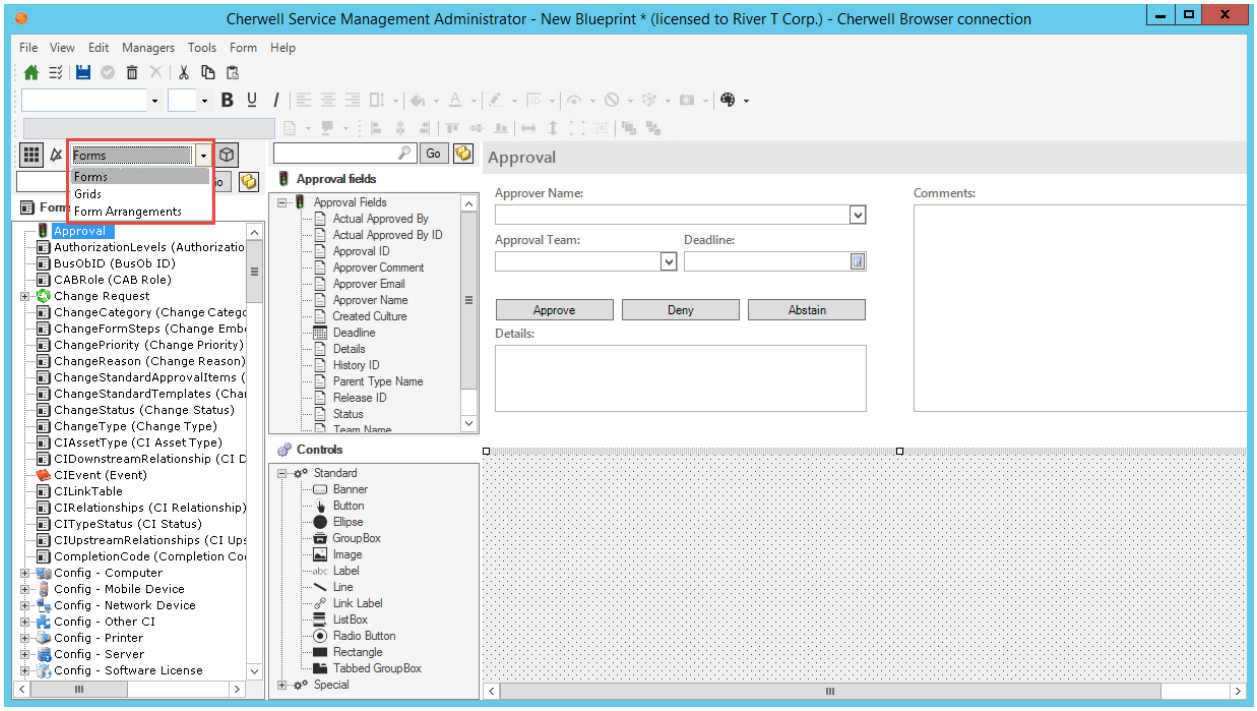


Definition Reviewer

The new Definition Reviewer provides a quick way to review and modify Forms, Grids, and Form Arrangements for all Business Objects. This is useful for ensuring consistency and usability across visual elements in your system, especially after you apply translations to your system using the tool set.

You can review and modify:

- All visual elements in a Blueprint or mApp
- Changed visual elements in a Blueprint or mApp



Browser Client and Customer Portal User Interface Enhancements

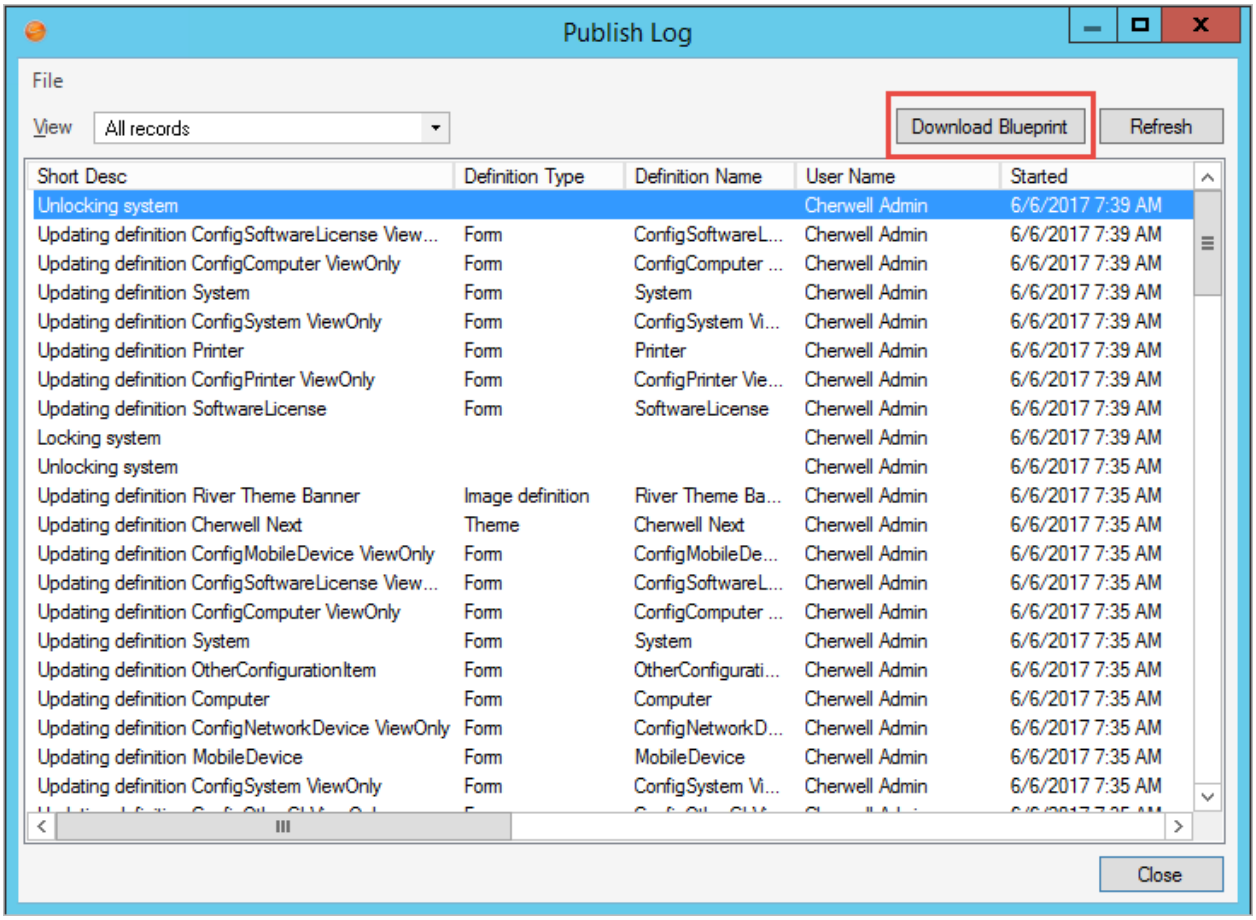
The Browser Client and Customer Portal offer improvements to the following features:

- **Banners:** The banners in the CSM Browser Client and Customer Portal are updated with a new look-and-feel, including a height of 50 pixels and the use of the Cherwell company logo.

- **Account Information Bar, Menu Bar, and Search Bar:** The User Information Bar, Menu Bar, and Search Bar in the Browser Client have an updated look-and-feel, including new drop-down styling, graphics, colors, and fonts. The menu bar now has a default height of 50 pixels and supports menu wrapping.

Download a Blueprint

The new Download a Blueprint button allows you to easily download a Blueprint from the Publish Log. Download a Blueprint to apply changes from other Users or to easily revert your system.



Cherwell REST API Enhancements

- **New Operations:** Operations were added for Teams, Users, Queues, Stored Values, and Gallery Images. For a complete list of new operations, refer to the REST API documentation revision history in About the Cherwell REST API.
- **PowerShell Examples:** Many PowerShell examples have been added to the REST API documentation, including:
  - Get an Incident
  - Create an Incident
  - Upload Attachments
  - Delete a Business Object
  - Get Search items
  - Perform an ad-hoc Search with a filter
  - Perform an ad-hoc Search with sorting
  - Create a User

- **Practice Exercises:** You can now practice using the REST API Discovery Tool by following a series of practice exercises that have been added to the REST API documentation.
- **Sample SAML Clients:** Documentation now includes sample client code for using SAML with the Cherwell REST API, including examples with and without a final URI query string.

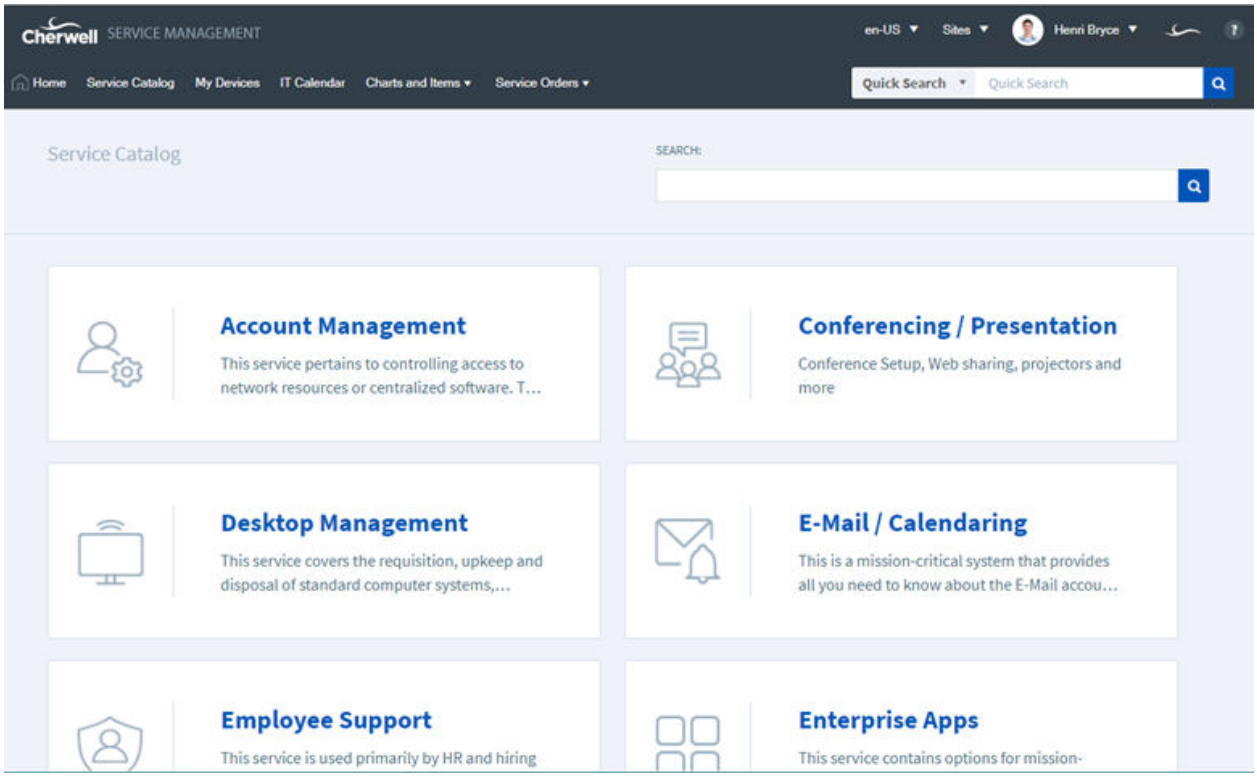
Local Catalog Performance

Local catalog caching has been enhanced to only retrieve new and changed items after a Blueprint publish. You should see increased system responsiveness with this change.

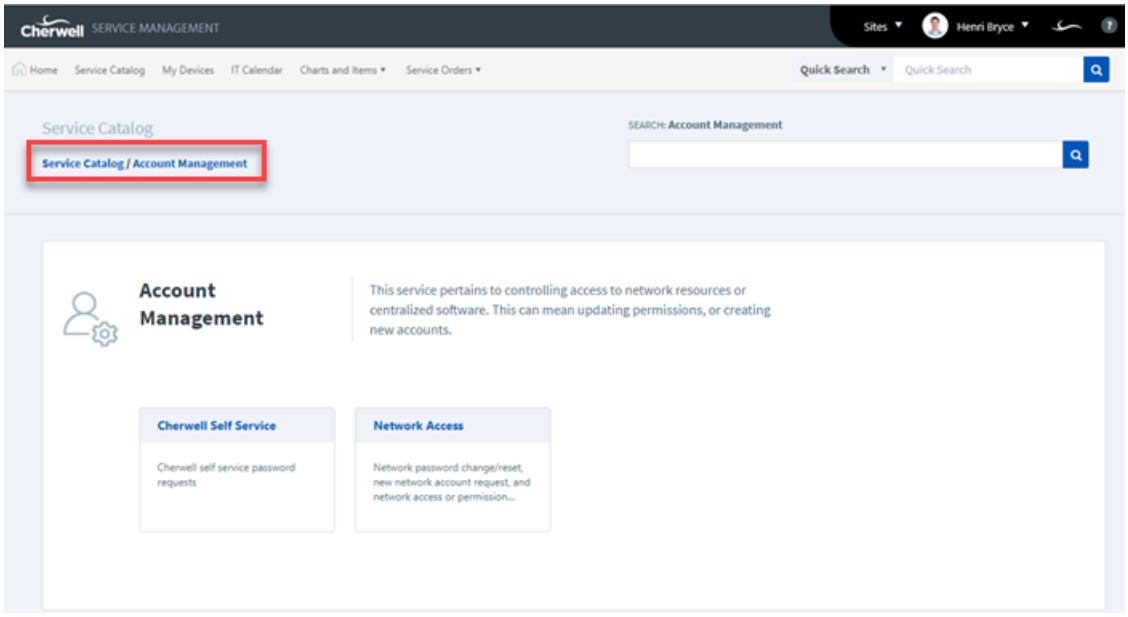
Overview of New OOTB Content for CSM 9.2.0

Improved Service Catalog and Search

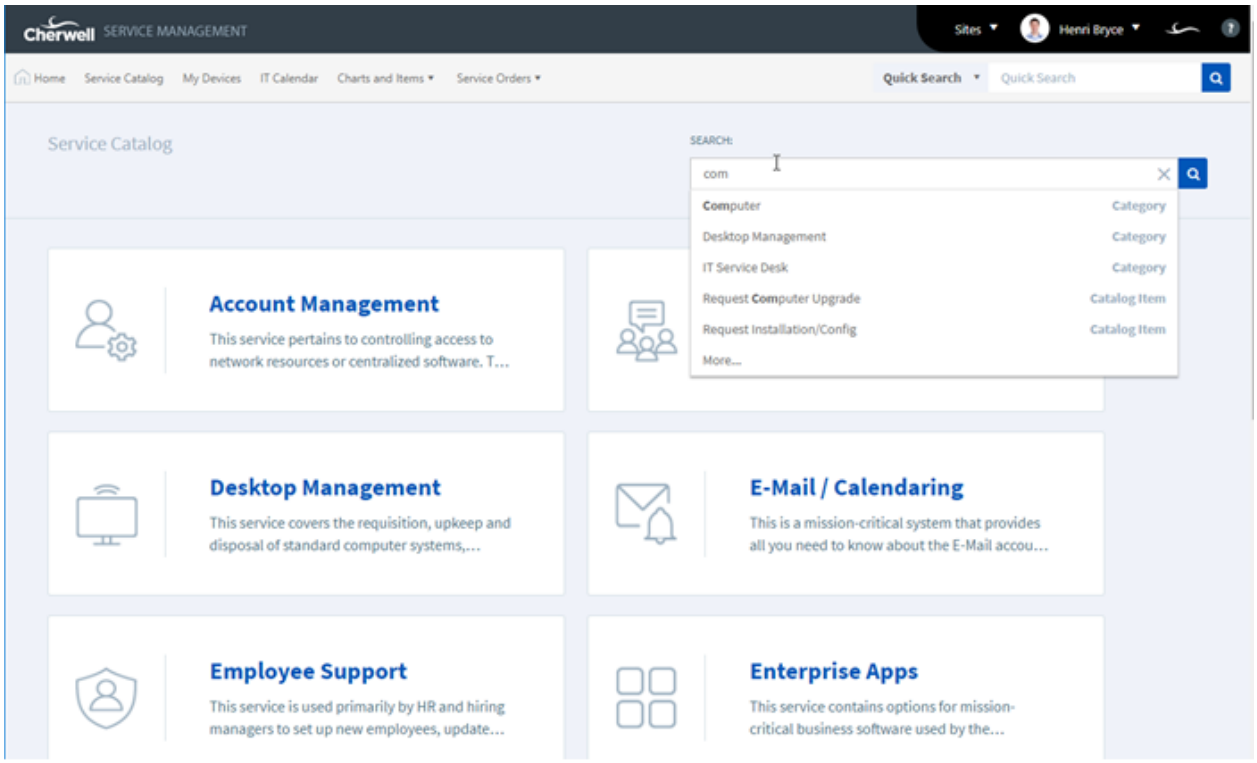
A new theme (called "Cards with Search") has been added to the Action Catalog Widget Manager. The new theme displays the name, description, and icon of Service Catalog items in a card-based layout. The number of columns displayed adjusts according to the user's screen size.



You can now use breadcrumbs navigate through the Service Catalog levels.



The Cards with Search theme also includes an improved search function that produces a list of suggested matches after a user types three characters into the search box. Users can search on the title and description of Service Catalog items. The drop-down menu list of suggested results will show up to five suggestions; click the **More...** link to view additional suggestions. Select the **Search** button or the enter key to view all search results.



To use an existing Service Catalog with the new theme, see Implementing the OOTB Service Catalog.

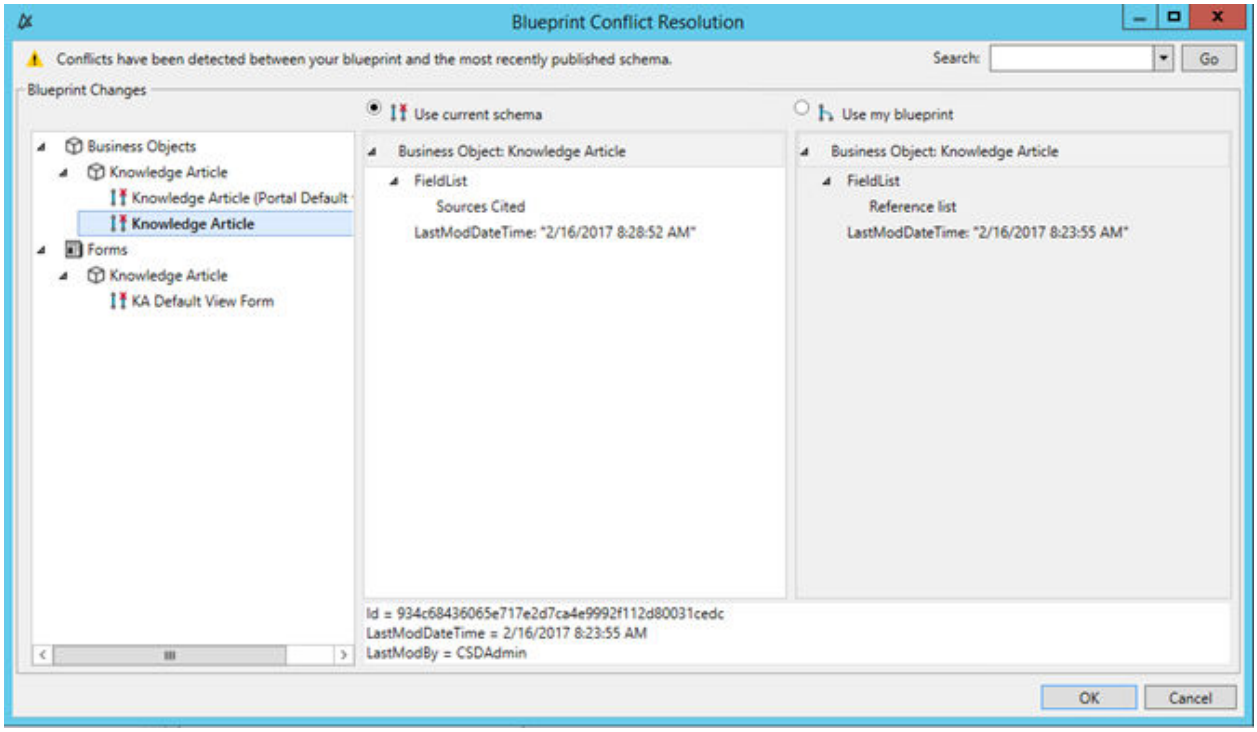
Localized OOTB Content

Out-of-the-box content is now available in French (fr-FR), German (de-DE), Portuguese (pt-BR), and Spanish (es-ES). You can choose between Demo or Starter databases that includes all these languages, along with English, or you can choose to use the Demo database or Starter database for English only.

Overview of What's New in CSM 9.1.0

Concurrent Development for Blueprints

If there are conflicts between a Blueprint you are trying to publish and the existing schema (for example, another developer has edited a business object after you began working on your Blueprint), you will now see a list of potential conflicts between the existing schema and the system objects you are updating in the Blueprint. Use the Blueprint Conflict Resolution window to view conflicts and choose whether to keep or discard your Blueprint changes. You can see when each item was edited and who made the changes.



Accessibility Improvements for CSM Web Applications

Continued accessibility improvements were made to the CSM Browser Client and CSM Portal, particularly for Grids.

Team Operations for the Cherwell REST API

You can now use these new operations to more effectively manage Teams with the REST API:

- **Add Users to Teams by Batch**
  Use the addusertoteambybatch operation to add multiple Users to a Team at once.
- **Create or Update a Team or Workgroup**
  Use the saveteam operation to create or update a Team or Workgroup.

New Modifiers

Multiple Modifiers were added:

- **Hash Text and Hash Mac Text**
  Applies cryptographic hashing algorithms to text strings. This enables you to create encrypted strings you can use to create tokens for APIs and to detect data changes.
- **Trim Start and Trim End (Text Modifiers)**
  Trims specified characters from the end of a text string. For example,

  to trim end characters from a string:
  - Original Token: 80906-1234
  - Modifier: Trim -1234
  - Results: 80906
- **Modulo (Math Modifier)**
  Returns the remainder of a division calculation. For example:
  - 10%3 returns 1
  - 5%3 returns 2
  - 3%10 returns 3

  In the last example, 3 is returned because the 3 divided by 10 is 0, with 3 as the remainder.