



What's New in CSM 9.4.0?

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- Cherwell Service Management
- Cherwell Asset Management

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Overview of What's New in CSM 9.4.0

Leverage Adaptive Layouts Functionality for Dashboards

CSM now supports the use of Adaptive Layouts for Dashboards.

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

You can use the Adaptive Layouts design features in the Dashboard Editor to create, edit, or delete Adaptive Layouts. You can also implement Adaptive Layouts with the same dimensions across many Business Objects by using an Adaptive Layout Preset.

Refer to the [Adaptive Dashboards Scenarios](#) for detailed examples of using Adaptive Layouts for Dashboards to improve your user experience and streamline your design process.

Common One-Step Action Execution Engine

One-Step Actions are now executed from a common consolidated engine, ensuring consistency and performance benefits across all CSM clients, including the web applications (Browser Client and Portal).

The following Actions now execute on the web applications when network access and security settings are appropriately configured:

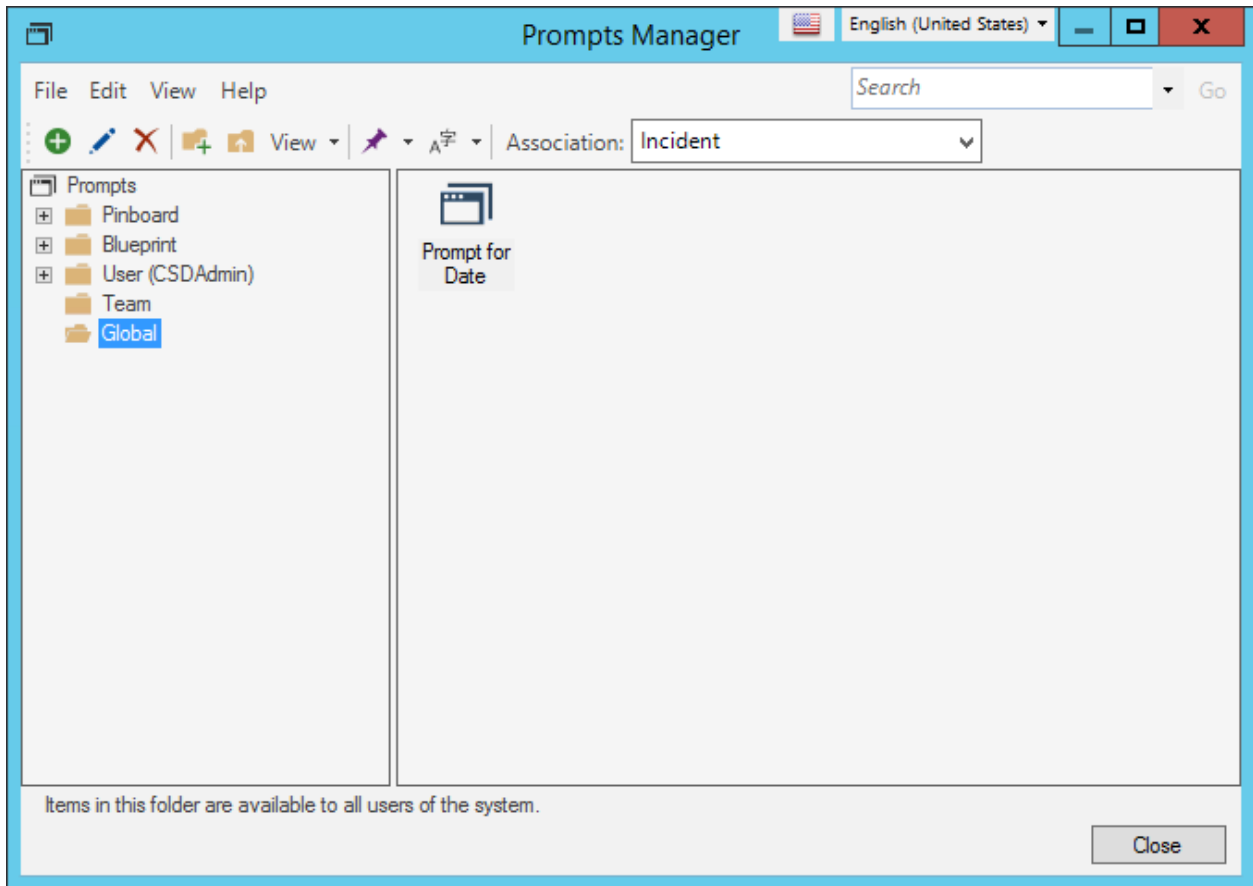
- Run a Program
- Run a Report
- Show a Pop-up
- Write to a File
- Read Contents from a File (using a Token)
- Excel Merge
- Execute a Command (Best practice: Use as a standalone Action or at the end of a set of Actions)
- Run Another One-Step Action

In addition, when One-Step Actions execute in the Browser Client, the interface now appears as disabled until the One-Step Actions completes.

Prompts and Prompts Manager

Prompts now use a common architecture, ensuring a consistent User experience across all CSM clients, including the web applications (Browser Client and Portal).

In addition, Prompts can be stored and accessed through the Prompts Manager. This enables you to create a stored Prompt from the Prompts Manager, and then use the Prompt for multiple features, such as One-Step Actions and Expressions.



The Prompts Manager is available from a Blueprint in CSM Administrator (**Managers>Prompts**) and from the Token Selector (from Query Builders, One-Step Actions, and Expressions). In the Browser Client, Prompts can be accessed but not created.

After you upgrade to CSM 9.4.0, existing Prompts are converted to inline Prompts and are available from the Token Selector.

Cherwell REST API Named Object Operations

You can now use Named Object Operations to perform basic functions against Business Objects via the Cherwell REST API. Named Object Operations include nine API operations with simplified URL paths to provide user-friendly, programmatic access to basic CSM functions. You may want to use the Named Object Operations if you are new to the Cherwell REST API or you do not have extensive programming experience. Functions that you can perform using the Named Object Operations include:

- Delete Business Object
- Get Business Object
- Update Business Object
- Create Business Object
- Get Business Object Field List

- Delete Business Object Comment
- Get Business Object Comments
- Create Business Object Comment
- Search for Business Object

You must add the PublishToApi attribute to a Business Object to activate this feature.

Refer to [Add Operations for Named Objects](#) for procedural information.

Cherwell Documentation Portal

Cherwell technical documentation is now hosted at <https://help.cherwell.com>.

Features include:

- **Modern interface:** Experience an updated and streamlined user interface design.
- **Searches:** Filter your search based on product, release, and role. As-you-type search recommendations allow you to quickly find the information you need.
- **Topic layout:** Easily navigate topic pages and associated content using tools such as On this Page and image zoom functionality.
- **Customizable PDFs:** Effortlessly create a PDF for any scope of content.
- **My Topics:** Save the content that is most important to you for easy access.

Cherwell Mail Delivery Service

CSM now features the Cherwell Mail Delivery Service, in conjunction with the Cherwell Message Queue Service, to queue and send outgoing CSM e-mail messages. This dedicated message handling service alleviates the processing burden (and associated bottlenecks) from the Automation Process Server and Application Server. Message queuing provides much-increased output for e-mail delivery (performance testing shows enabling queues allows e-mail messages to be sent 18.5 times faster than if queues were not enabled).

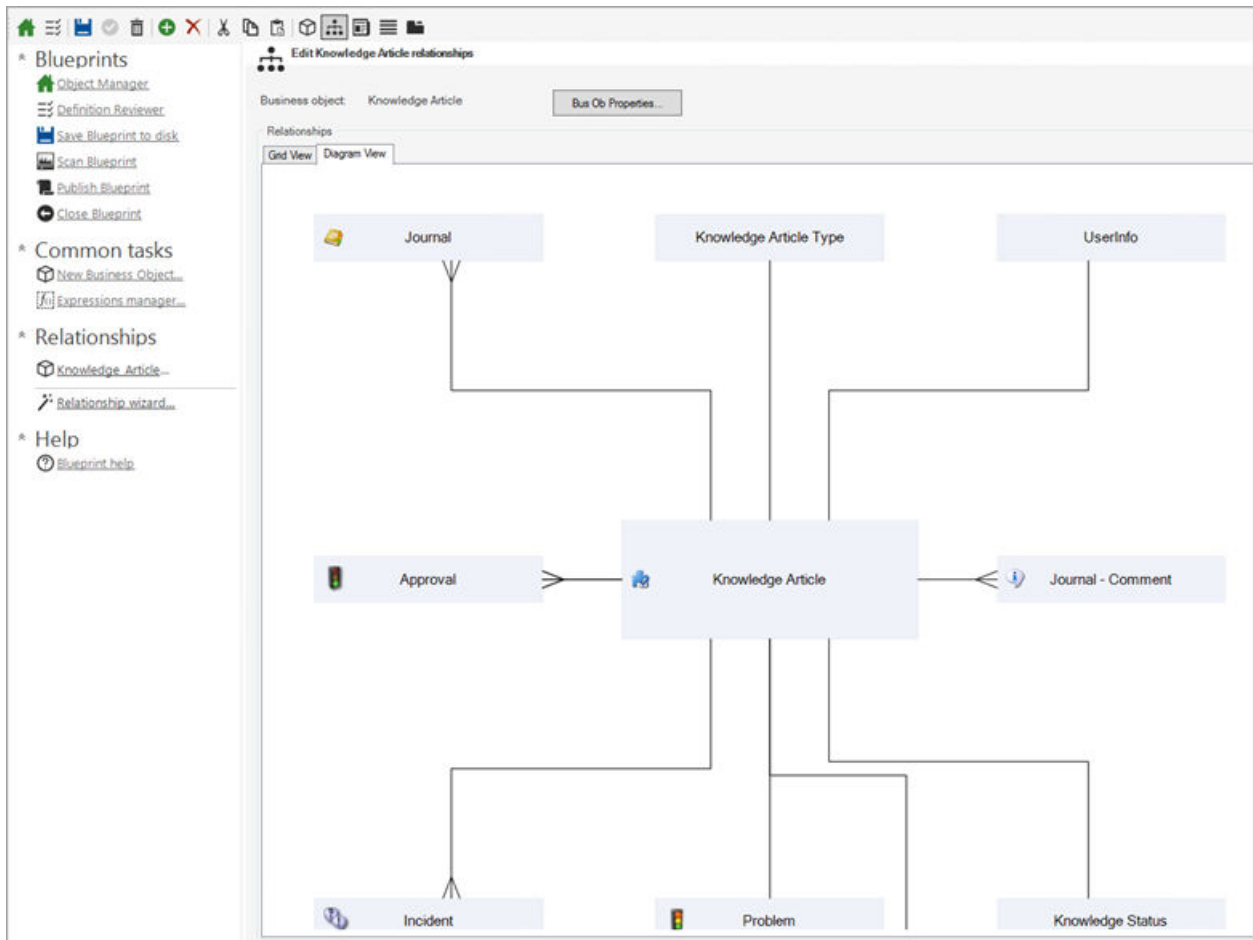
E-mail messages from CSM are sent to Cherwell Message Queue Service; Cherwell Mail Delivery Service consumes the messages from the queue and sends them. This allows work to be consistently distributed among servers when sending outbound messages.

Multiple External Connections

You can now map Business Objects to multiple external connections instead of one, which allows data to be imported from many external sources. Use the Blueprint Editor in CSM Administrator to establish external connections, and then use the Business Object Properties page to view or edit external connections.

View Entity Relationship Diagrams for Business Objects

Use the Diagram View tab in the Relationship Editor to view an Entity Relationship Diagram for the selected Business Object. Diagrams are automatically generated and can be exported into several formats.

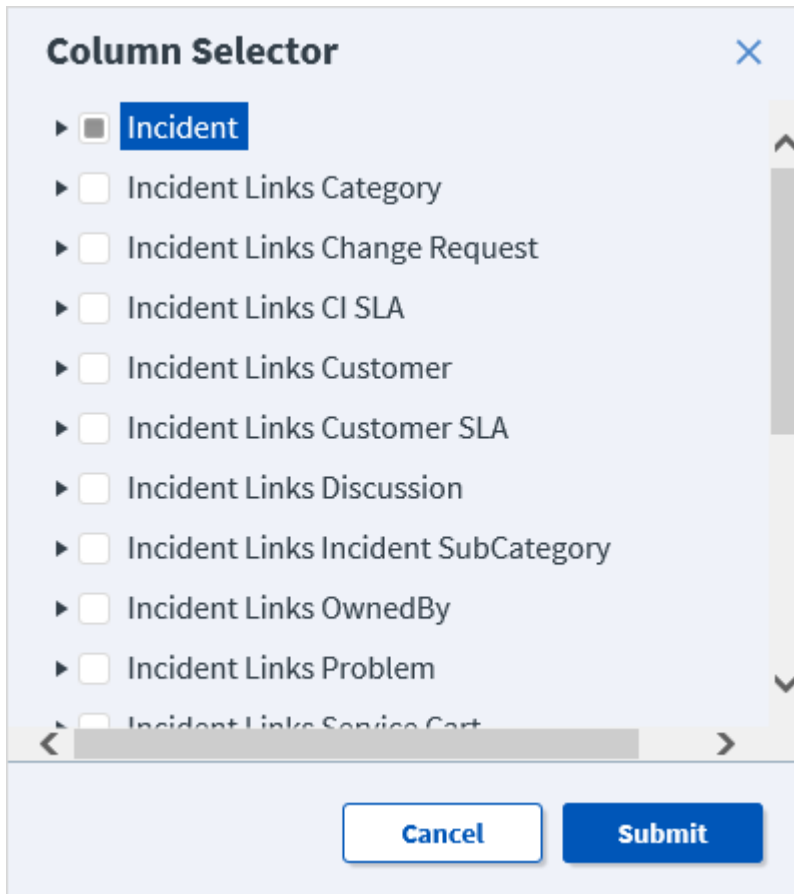


Unique Tab Display Names

Multiple features in the Browser Client and Customer Portal now 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, Quick Search, Search Groups, Tools, Reports, Dashboards, Calendars, Quick View, Go to Item Functionality, Startup Items, Service Catalog, HTML Pages, and the Document Repository.

Column Selector Enhancement

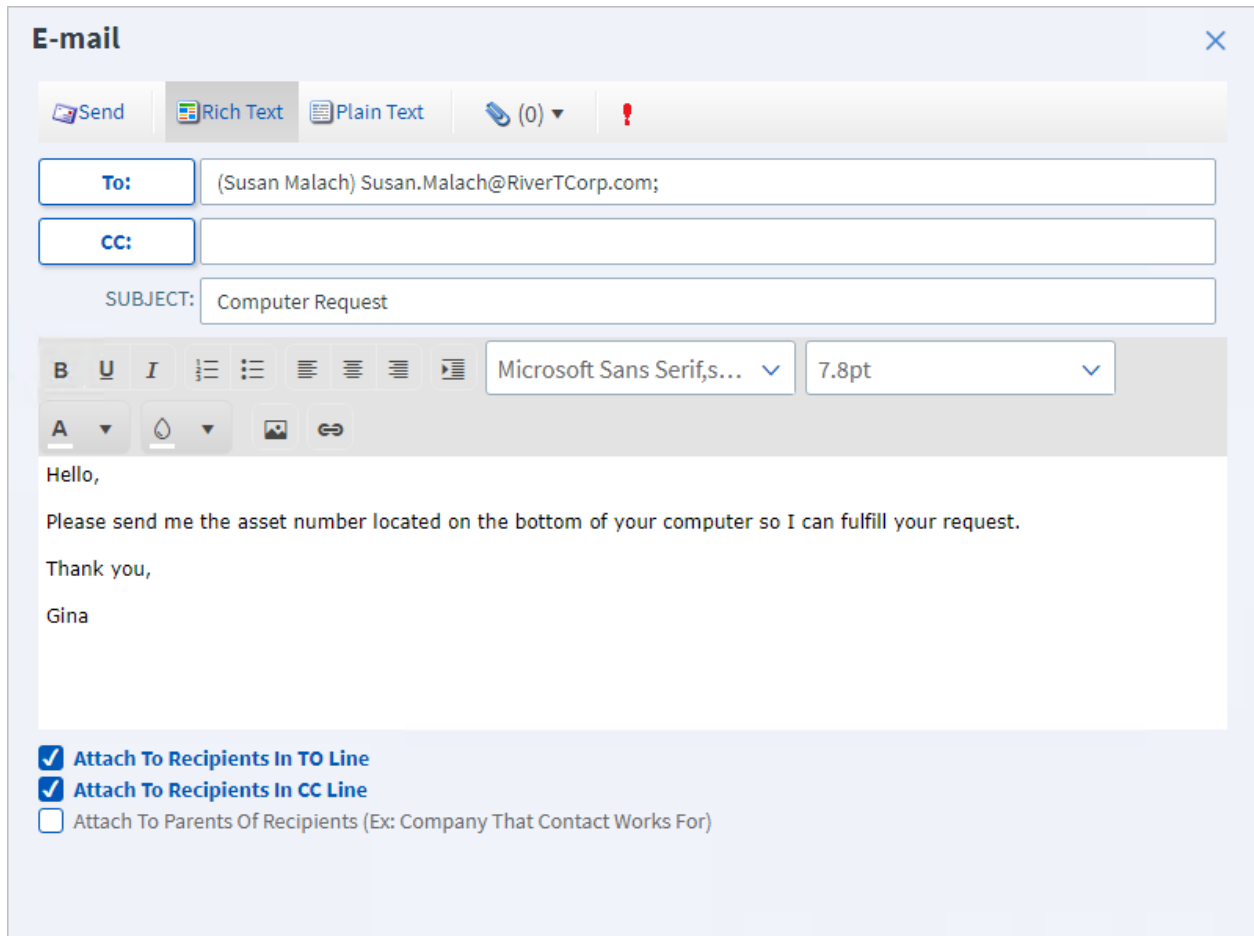
The Column Selector in the Browser Client has an updated user interface design and workflow.



Refer to the [Add and Remove Columns in the Browser Client](#) topic for procedural information.

E-mail Modal Enhancements

The Browser Client E-mail window and associated modals (Address Book, File Upload, Upload Image, and Insert Hyperlink) have updated user interface designs, which affect fonts, colors, buttons, and message wording.



E-mail

Send Rich Text Plain Text (0) !

To: (Susan Malach) Susan.Malach@RiverTCorp.com;

CC:

SUBJECT: Computer Request

B U I [List Icons] Microsoft Sans Serif,s... 7.8pt

A [Color Picker] [Image Icon] [Link Icon]

Hello,
Please send me the asset number located on the bottom of your computer so I can fulfill your request.
Thank you,
Gina

Attach To Recipients In TO Line
 Attach To Recipients In CC Line
 Attach To Parents Of Recipients (Ex: Company That Contact Works For)

Date and Time Form Controls

Date and Time form controls in the Browser Client have updated designs to improve the user experience.

Custom Favicon Support

Use the Site Editor in CSM Administrator to define a custom image, also known as a Favicon image, for your Site's browser tab. The image appears on the tab of browser windows, to the left of the Site name. Upload an image of your company logo or choose a custom image to represent your Sites.

Define Default Configuration Item Order in the CMDB

Use the Form Editor to define the default order in which Configuration Items appear in the CMDB. Choose to sort CIs by a single Customer, or by All Customers.

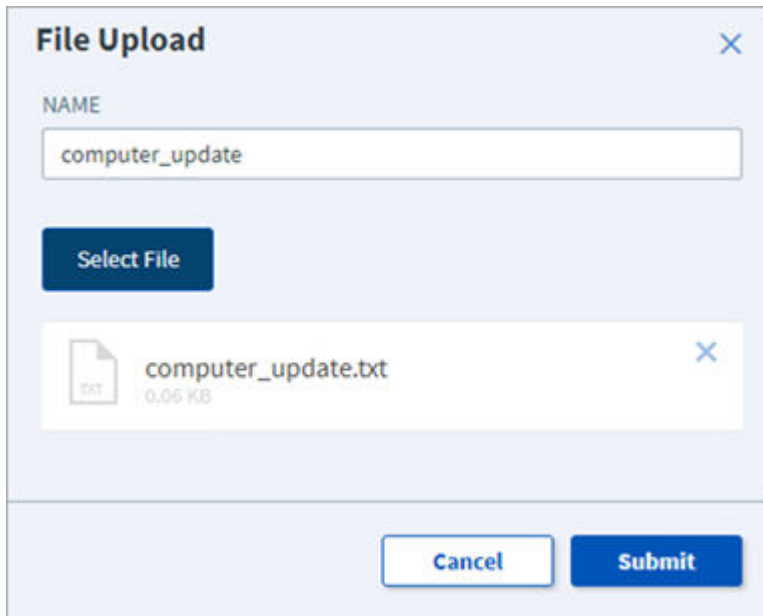
Grid Exports From the Browser Client

You can now export a Grid (CSV and Excel formats) using a drop-down menu in the Browser Client toolbar.

Refer to the [Export a Grid in the Browser Client](#) topic for procedural information.

Upload File Enhancement

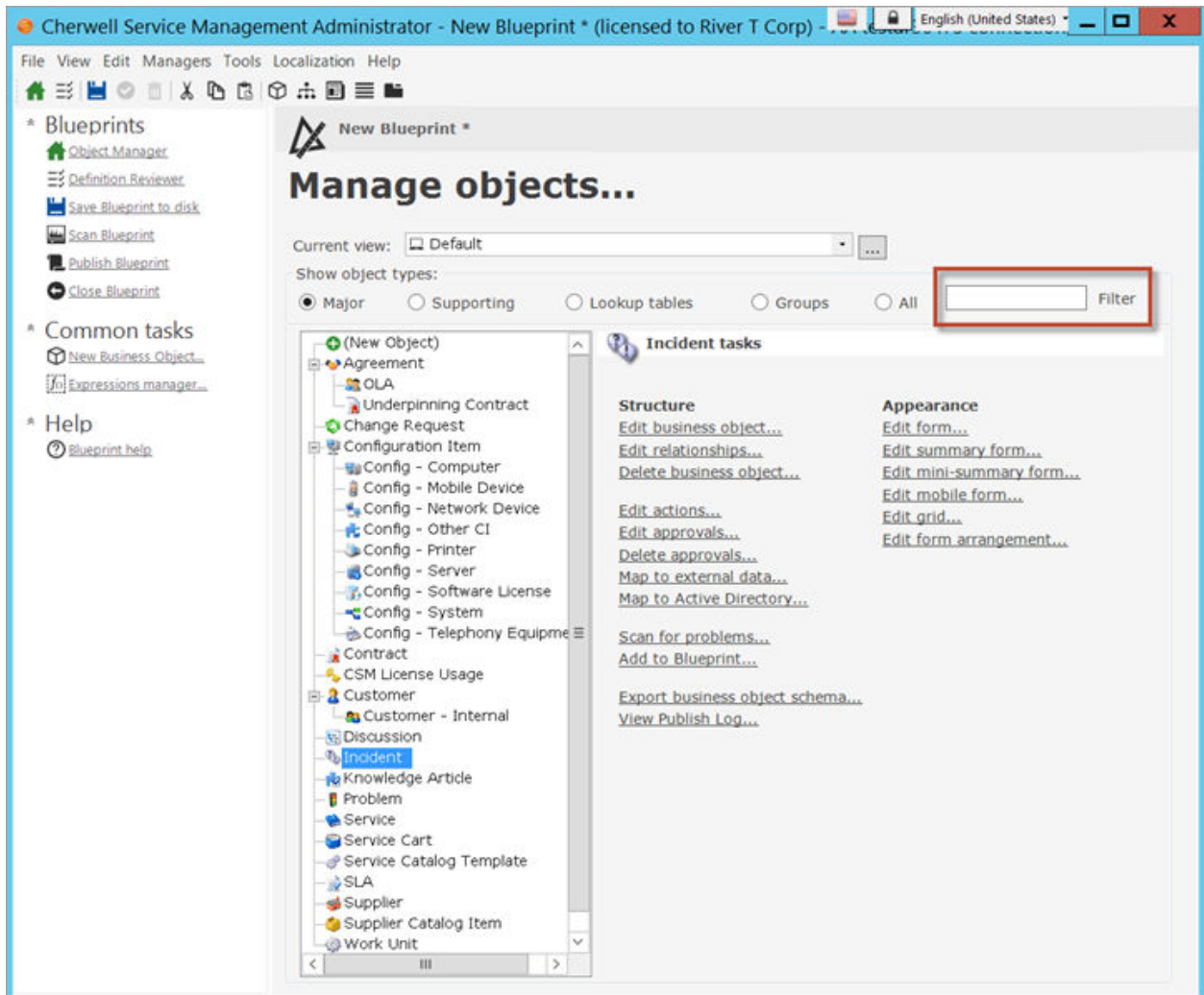
The File Upload modal used in the Browser Client and Customer Portal has an updated user interface design, which affects fonts, colors, buttons, and message wording. Access the modal from either the Business Object toolbar or E-mail modal in the Browser Client and the Document Repository toolbar in the Customer Portal.



The screenshot shows a modal dialog box titled "File Upload" with a close button (X) in the top right corner. Below the title, there is a "NAME" label and a text input field containing "computer_update". A blue "Select File" button is positioned below the input field. Underneath, a file upload progress bar shows a document icon, the filename "computer_update.txt", and the size "0.06 KB", with a close button (X) on the right. At the bottom of the modal, there are two buttons: "Cancel" and "Submit".

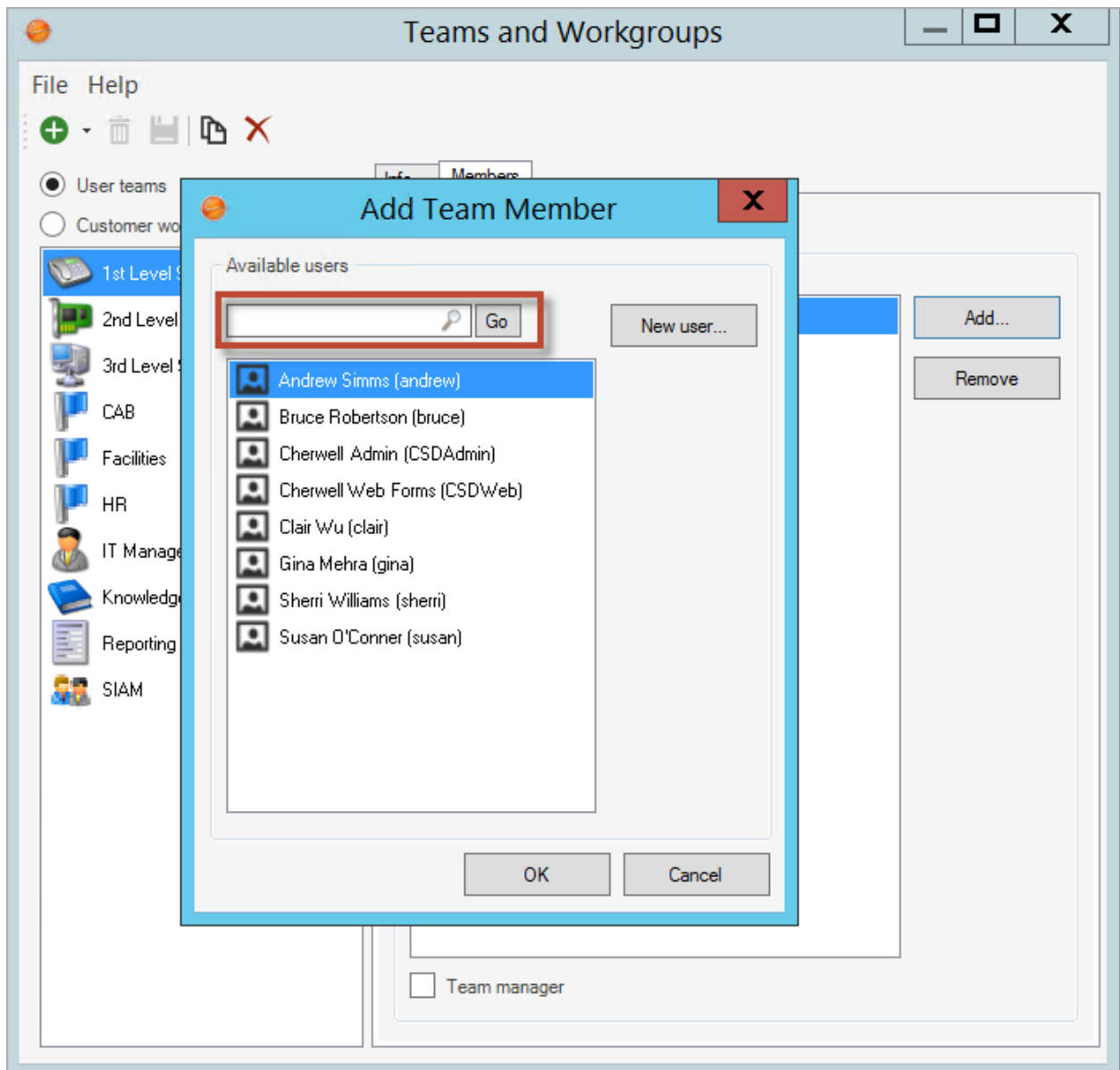
Filter Business Object Type

Use the Business Object filter to limit the list of Business Objects shown in the Object Tree.



Search Functionality Added to Teams and Workgroups

You can now search for users when adding members to Teams and Workgroups in the CSM Administrator. Use search functionality to quickly add members to existing or new Teams and Workgroups.



Bomgar Platform Integration Retirement

Chat commands related to the Bomgar platform integration have been removed from One-Step Actions. These commands were used primarily for the Bomgar platform integration, which was retired in January 2018.

Bomgar remote support sessions are now supported through the Bomgar Integration mApp Solution, which is available on the Cherwell mApp Exchange. You can also use a Call a Web Service One-Step Action to create a custom integration between CSM and Bomgar.



Note: Systems using the legacy Chat commands to integrate with Bomgar must be migrated to the Bomgar Integration mApp Solution or a custom integration using a Call a Web Service One-Step Action **before** the upgrade to CSM 9.4.0.

Overview of New OOTB Content for CSM 9.4.0

Task as a Group Business Object

Task is now a Group Business Object Leader with two Group Members: Approval Task and Work Item. Knowledge Article Approvals now use the Approval Task Form. Problem, Incident, and Change Management now utilize the Work Item Form. Both Approval Task and Work Item can be accessed from the Form Arrangement area of their associated Business Object.