



CSM 9.5.0 Release Notes

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The Cherwell Software product suite includes:

- Cherwell Service Management
- Cherwell Asset Management

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Contents

| | |
|--|-----------|
| Release Notes | 4 |
| ◦ CSM 9.5.0 Enhancements List | 5 |
| ◦ CSM 9.5.0 Fixes List | 8 |
| ◦ CSM 9.5.1 Fixes List | 14 |
| ◦ CSM 9.5.2 Fixes List | 15 |
| ◦ CSM 9.5.3 Fixes List | 16 |
| ◦ System Requirements | 17 |
| ◦ Revision History | 20 |
| ◦ CSM Documentation Archive | 27 |

Release Notes

View CSM enhancements and fixes, organized by version.

CSM 9.5.0 Enhancements List

CSM 9.5.0 Release Notes: enhancements include new features and changes in functionality.

- CSM-10567 Browser Client: The Rich Text Editor has an updated user interface and new functionality. The editor now supports image sizing (small, medium, large, or full) and additional view options (zoom in on an individual image or open the image within the Browser Client window).
- CSM-22698 One-Step™ Actions: Added a security right to control a User's ability to configure a One-Step Action, including its sub-Actions, to run through a Trusted Agent.
- CSM-24145 CSM: General security fix.
- CSM-27211 Globalization: If your CSM database supports Unicode characters, you can now enable multi-byte support to enable cultures that use multi-byte languages, such as Chinese, for translation.
- CSM-27470 Browser Client and Customer Portal: The Plain Text Editor now has an updated user interface design and field zoom functionality.
- CSM-27554 Dashboards: Web Client Dashboard Theme changes synchronize between Adaptive Layouts. When a User selects a theme from Theme Manager it will apply the selected theme to the layout and will apply the same theme as the layout changes.
- CSM-27670 Adaptive Layouts: Added the ability to resize Adaptive Layouts in the Dashboard Editor by dragging the Adaptive Layout borders.
- CSM-28533 Browser Client: Added the ability to view an uploaded image in four sizes (small, medium, large, and full size) directly from the Rich Text Editor toolbar.
- CSM-30985 Security: You can now access the SAML IDP force authentication setting through a GUI.
- CSM-31088 One-Step™ Actions: Added folders for each Trusted Agent Group to the One-Step Action Manager in the CSM Browser Client. The folders are only visible when Trusted Agents are enabled for your system and are configured for individual One-Step™ Actions.
- CSM-31098 Desktop Client: Updated the user interface design for the Related Item Picker, Go To Related Item, and Matrix Control icons.
- CSM-31732 OOTB Content: Added Site and Building management to enable Site and Building Managers to effectively monitor the relationship between one or more Sites and associated Buildings related to a Customer, Configuration Item (CI), or other applicable Business Objects.
- CSM-31824 Globalization: Added a scope column to the Manage Language Packs dialog box.
- CSM-31842 Browser Client E-mail: Updated the image size functionality. The size options have a new user interface design and are now located in a drop-down menu in the E-mail window.
- CSM-32159 Browser Client: Converted single line text box Business Object form control to client-side rendering using Kendo UI styling.
- CSM-32279 Globalization: Translations are now available for the Login, Connection Wizard, and Connection dialogs.
- CSM-32361 Dashboards: When enabling a tab stop for a Dashboard Widget, the default tab index is now a number larger than the largest existing tab index in the Dashboard rather than zero.
- CSM-32703 REST API: Added the Canonical REST API Mapping Wizard to simplify the process of mapping a canonical Business Object Schema to a custom Business Object Schema.

- CSM-32856 Portal Localization: The format for exporting Portal Platform strings for translation from the Site Manager is now .tsv. In previous releases, the format was .xml.
- CSM-32857 Customer: Created a relationship between Customer Objects and the Site Object so Sites and Buildings can be associated with Customers.
- CSM-33418 Server Farms: Improved performance changing web session storage methods.
- CSM-33419 Cherwell Server Farms: Reduced the size of the IIS session and increased performance when Redis is used to store the web sessions.
- CSM-33468 Globalization: When Users access online help from within CSM, the selected content culture now determines which language for which help is opened in the Documentation Portal. For example, if you select German (Germany) as the content culture, German help shown. If online help content is not available for a selected culture, Users are shown English content.
- CSM-33725 Command-Line Configure, System Restore: Added the option to use Unicode data types in a database to the System Restore command-line utility.
- CSM-33728 Adaptive Layouts: Added the ability to resize Adaptive Layouts in the Form Editor by dragging the Adaptive Layout borders.
- CSM-33740 Cherwell Server Farms: Session Caching is no longer available. During the upgrade to CSM 9.5.0, the feature will be removed for systems on which session caching was enabled.
- CSM-33781 Trusted Agents: Added the ability to generate a secure Shared Key for the Trusted Agents Hub.
- CSM-33867 Logging: Improved the logging system by employing asynchronous buffering and decreased complexity by eliminating multiple levels of log processing and transformation.
- CSM-34113 One-Step™ Actions: Actions can be now configured to execute using Trusted Agents. This enables you to execute specific Actions on remote servers and distributed systems. You can use Trusted Agents with Print, Run a Program, Write to a File, Transfer Attachments, Call a Web Service, and Excel Merge Actions.
- CSM-34142 Globalization: You can now use Language Packs to translate system platform strings for languages that are not provided with CSM by default (English, French, Spanish, Portuguese, and German). To support this change, localized binaries are now stored in the database instead of the CSM installation directories.
- CSM-34224 Blueprints, mApp Solutions: Several Item Managers have been added to Blueprints and mApp Solutions, increasing the number of items that can be published to a Blueprint or added to a mApp Solution and shared across systems. Added Item Managers are Business Hours, E-mail and Event Monitor, Reports, and Stored Import Definitions.
- CSM-34408 CSM Installation: The Server Installer now prompts for an environment (Development, Test, or Production) during the installation process. This applies to both new installations and upgrades unless the environment is already configured.
- CSM-34437 Browser Client Rich Text Editor: Updated image size functionality. You can now click a link to open the image in a new browser tab or double-click the image to open the image in the Viewer Image window.
- CSM-35052 CSM: TCP connections to the Application Server are no longer available for new installations of CSM.

- CSM-35126 Browser Client: Barcode scanning can now be configured for use with mobile devices. You can add the BarcodeScan attribute to any Business Object, and then add a Field to store the barcode value.
- CSM-35281 Accessibility: Improved screen reader support for the Send E-mail dialog.
- CSM-35304 Configuration Item: Created a relationship between Configuration Item Objects and the Site Object so Sites and Buildings can be associated with Configuration Items.
- CSM-35520 Browser Client: You can now set the current location of a Business Object by adding the Location attribute to any Business Object.
- CSM-35668 CSM: General security fix.
- CSM-36555 Knowledge Article: The Knowledge Article Business Object no longer uses the Approval Task workflow.
- CSM-37757 Globalization: A set of default Language Packs is no longer provided with the starter and demo databases.
- DR 42747 Browser Client: Added functionality that automatically updates a Related Item Picker field when the field is changed from a value to empty.
- DR 8974 Help Settings: Added the ability to disable the Report an Error setting, which removes the option from the help menus in Web Clients. Also added the ability to set an alternate Report Error e-mail address if functionality is desired, as well as the ability to set an alternate Support team phone number. Configure custom help settings in CSM Administrator.
- QWIK-145 Cherwell REST API: Removed installed documentation for the Cherwell REST API. Users are now directed to version-specific documentation on <https://help.cherwell.com>.
- QWIK-43 Form Arrangement: Added the ability to specify a Form other than the default Form when viewing the Group Leader Form in the Form Arrangements.
- QWIK-49 Searching: Join table searching has been added to the Search Manager and Quick Search, to support one-level deep of joins, and only from the main Business Object in the relationship. The join relationship must have the 'Join Has Reason' check box selected for the join table to be searchable. All fields in the join table are available for searching.
- QWIK-82 Blueprints, mApps: Added the ability for the following options from the command-line: Publish a Blueprint file and create a Blueprint file from a mApp file.

CSM 9.5.0 Fixes List

CSM 9.5.0 Release Notes: this list describes fixed issues that were reported in previous releases.

- CSM-17318 Expressions, Forms: Fixed an issue in the Rich Client where Button and Link Label Controls display an image, even when the Expression criteria is not met.
- CSM-25407 Dashboards, Widgets: Fixed an issue in the Portal and Browser Client where the size of a Dashboard Chart Widget changed after a refresh or applying a filter.
- CSM-25440 Dashboards: Fixed an issue where after refreshing the Search Results List Widget in the Portal and Browser Client, the applied filters were removed.
- CSM-25484 Dashboards: Fixed an issue on Dashboards where the Tab Group Widgets were not displaying correctly. The Widgets were showing vertical scroll bars on the tabs and the tab content height was not calculating correctly when a horizontal scroll bar was present.
- CSM-27756 One-Step™ Actions: Added a missing option for creating a new custom Prompt when using the Set Value option for a Field.
- CSM-29297 Browser Client: Fixed an issue where the user could copy an image and paste it in a plain text field of an e-mail.
- CSM-29392 E-mail: Fixed an issue that caused styling issues in Rich Text Fields.
- CSM-30394 Dashboards: Fixed an issue where the Dashboard Widget date filters were not being hidden when a Filter Widget on the same Dashboard was configured to hide date filters.
- CSM-30666 Portal and Browser Client: Fixed an issue where certain network configurations would result in Cherwell incorrectly detecting the requested port and/or scheme (HTTP vs. HTTPS).
- CSM-31143 Dashboards: Fixed an issue that caused row styling issues for Dashboard Search Results List Widgets that have the "Show as Links" option enabled. This problem only occurred in the CSM web applications.
- CSM-31375 Dashboards: Fixed an issue for Web Clients, when using Adaptive Layouts on a desktop machine, if a field was just updated, and the Browser window was immediately resized, it caused the text in a Rich Text Field to be lost. The text was lost until a new Adaptive Layout was drawn.
- CSM-31435 Browser Client and Customer Portal: Fixed an issue in localized systems where using an alternative site caused special characters in tab references to display incorrectly.
- CSM-31570 Dashboards: Fixed an issue that prevented Dashboard Filter Widget values from synchronizing across Adaptive Layouts.
- CSM-31945 Browser Client and Customer Portal: Fixed an issue where URL strings for deep linking did not respect case insensitivity.
- CSM-32006 Widgets: Fixed an issue where drilling down to the results of the first row of a Matrix Widget can yield incorrect results.
- CSM-32210 Dashboards: Fixed a display issue where a Dashboard Widget would not transition smoothly from one Adaptive Layout to another, if both size and location were different between the two Adaptive Layouts. This problem occurred only in the CSM Desktop Client.

- CSM-32359 Dashboard Widgets: Fixed an issue in the Browser Client that caused duplicate filters to appear on certain Widgets when Users drilled down to data and then clicked the browser Back button.
- CSM-32384 Dashboards: Fixed an issue with search Widgets where the default text was not positioned correctly during and after a transition between different locations in different Adaptive Layouts.
- CSM-32494 Customer Portal: Fixed an issue where Users were not able to edit the display name when editing an item in the Document Repository.
- CSM-32768 Browser Client: Fixed an issue where when a user attached a file to an e-mail and then sent the e-mail, the received e-mail did not have the attached file.
- CSM-32907 Dashboards, Portal: Fixed an issue where when a user sets dimensions (width and height) for a Dashboard Adaptive Layout, the Dashboard layout in the Browser Client and Portal was not keeping the same dimensions.
- CSM-33200 Customer Portal: Fixed an issue where using a deep link to the Portal with SAML authentication causes the login window to repeated appear, even though the User has provided the appropriate login information.
- CSM-33331 Dashboards: Fixed an issue where some very large Widgets (relative to the current Adaptive Layout size) could not be selected when editing a Dashboard.
- CSM-33397 Licensing: Fixed an issue where a User would consume a license but was unable to log in using SAML when navigating to the Browser Client with a URL that didn't match the casing of the IIS Application Name.
- CSM-33398 Definitions: Fixed an issue where the local catalog might not be correctly rebuilt if the same Cherwell connection was pointed to a different Application Server or database.
- CSM-33427 Forms: Fixed an issue in the Related Item dialog that caused a circular dialog display issue if the User re-selects the same User.
- CSM-33504 Security: Added a header to web server responses that will prevent reflected XSS.
- CSM-33506 Dashboards, Widgets: Fixed an issue for Web Clients where filtering did not work when a Filter Widget was placed on a Dashboard, along with a Search Results List Widget, when its built-in User selectable Date Range filter was enabled.
- CSM-33724 Browser Client: Fixed an issue where an error modal opened and the results list closed when a user edited a Search and clicked OK.
- CSM-33885 Dashboards: Fixed an issue with mApp Solutions where Dashboards were not being correctly added to the target system.
- CSM-33926 Dashboards: Fixed an issue in the web clients where a Query Filter Widget does not synchronize across Adaptive Layouts.
- CSM-34304 Searching: Fixed an issue that caused an empty results list when Users manually entered a specific date to filter by a Date/Time column on a Grid.
- CSM-34590 Customer Portal, Widgets: Fixed an issue where the table Form loads briefly before the correct catalog displays (Service Catalog), when running One-Step Dashboard navigation actions in the Customer Portal.
- CSM-34606 Dashboards: Fixed an issue on Adaptive Layouts in the web clients where turning a Query Filter Widget on or off caused a selected lookup filter to reset to default.

- CSM-34973 Table Management: Fixed an issue in the Browser Client that caused the label on the Search button to incorrectly show "Show Search" rather than "Hide Search" after a Type had been selected.
- CSM-35023 mApp Solutions: Fixed an issue where Widgets in Dashboards created from mApps built in previous versions of CSM would sometimes not be displayed when editing or after applying the mApp Solution.
- CSM-35048 Dashboards: Fixed an issue where Query Clauses that were based on User-entered date ranges excluded values associated with the last day of the range.
- CSM-35080 Dashboards: Fixed an issue in the Rich Client that caused the Dashboard Adaptive Layout height and width properties to allow negative values, when dragging the layout in the Dashboard Editor.
- CSM-35682 Security: General security fix.
- CSM-35767 One-Step™ Actions: Fixed an issue that caused Go to a Field Action to navigate to an incorrect Field on embedded forms.
- CSM-35848 CSM Administrator, Action Manager: Fixed an issue where the item list did not refresh when selecting the Command Action from the Action Manager.
- CSM-35854 Dashboards: Fixed an issue where Users were not getting a warning message when an Adaptive Layout was dragged to resize to a width or height of zero.
- CSM-36212 Cherwell REST API: The ServiceInfo operation now returns the current offset from UTC for the time zone of the server. This is needed to accurately convert server based date and time values to UTC depending on the time zone of the server and whether the time zone is currently observing daylight savings time.
- CSM-36387 One-Step™ Actions: Fixed an issue that caused the appearance of a Business Object to incorrectly change when a One-Step Action was run.
- CSM-36455 Globalization: Fixed an issue that caused the non-default selected language to change when Users switched Roles.
- CSM-36517 Search: Fixed an issue that prevented Cherwell-generated queries from working on external data sources when the external data source columns had spaces in their names.
- CSM-36707 Relationships, Grids: Fixed an issue in the Web Applications that caused excessive memory consumption. All Relationships now load as Load Keys only.
- CSM-36775 Searching: Fixed an issue that prevented CMDB searches from showing data for new columns added to a Group Member Grid.
- CSM-37016 Dashboards, Localization: Fixed an issue that caused an error when trying to save edits to a Dashboard Widget in a different language (German, French), when the Widget's width or height contained a decimal.
- CSM-37748 Widgets: Fixed an error when switching between the search node and the pinned items node of the manager dialog in the Desktop Client.
- CSM-37754 Globalization: Fixed an issue that caused errors related to required and validated Fields occurred with a Language Pack was applied.
- CSM-37817 Browser and Portal Client: Fixed a web client Dashboard resource management issue (Web apps and CherwellService).

- CSM-38203 Blueprints: When publishing a Blueprint, "Force Out Users" is no longer an option.
- DR 15248/DR 43409 CSM Portal: Fixed an issue that caused the Limit Results setting to be ignored for Search Results Widgets.
- DR 28904 Authentication: Fixed an issue where Browser Client and Portal Users would be logged out when navigating to a URL (example: One-Step Action Launch URL or e-mail links) that didn't match the casing of the IIS Application Name.
- DR 32961/DR 43832 Security: Fixed an issue Users without Table Management rights were still able to access Table Management, Contact Manager, and CMDB.
- DR 33253 CSM Portal: Fixed an issue that caused spaces to be removed when Users pasted content into a Rich Text Field.
- DR 36175 mApp Solutions: Fixed an issue that prevented notification images in a mApp Solution from displaying when a mApp Solution was created immediately a Blueprint was opened and closed.
- DR 36758 Customer Portal: Fixed an issue where clicking the list or grid icon after displaying a Business Object displayed results for all Objects instead of just one.
- DR 39838 Widgets: Fixed an issue where the "Previous Quarter" Dashboard Filter Widget range was excluding the last day of the quarter from Widgets that were affected by that Filter Widget.
- DR 41566 CSM Portal: Fixed an issue that incorrectly prompted Users to accept the use of a license when the "Acquire a license on edit (suppress prompt)" check box was selected for a Portal Site.
- DR 42695 Grids: Fixed an issue in the CSM Desktop Client where the current column view would not be correctly represented in the grid export column chooser.
- DR 42881 Grids: Fixed an issue that showed incorrect counts when grouping was applied to Search results.
- DR 43006 Browser Client: Fixed an issue that prevented an embedded Form from changing when triggered by a Field on the same embedded Form.
- DR 43151 Relationships: Fixed a validation issue in CSM Administrator that allowed Users to create a Relationship with a duplicate name when they navigated to another tab on the Create Relationship dialog. This caused errors with the original Relationship during Blueprint scanning.
- DR 43339 Browser Client: Fixed an issue where Users were unable to drill down into Action Catalogs on Dashboards.
- DR 43348 CSM Browser Client: Fixed an issue that caused text to be truncated when a less than (<) character was used in the Description field.
- DR 43432 Browser Client and Portal: Fixed an issue where the Windows login link appeared in the Browser Client and Portal when only LDAP was configured for the system.
- DR 43464 Security: Fixed a potential vulnerability during file uploads.
- DR 43704 Automation Processes: Fixed an issue where an Automation Process that triggered from a Field change to create a Child Business Object would run continuously. This issue occurred when the event field had validation and Store Foreign Key enabled.
- DR 43800 One-Step™ Actions: Fixed an issue that caused an error when running One-Step™ Actions from the context menu for records in a grid in the Portal.

- DR 43845 Searching: Fixed an issue in the CSM Browser Client that caused searched filters to return incorrect results by removing automatic wildcard characters that adjusted the length of the User's criteria.
- DR 43918 CSM Portal: Fixed an issue that was limiting the export of grid data to the first 100 rows for Search Results List Widgets.
- DR 43950 Relationships: Fixed issue where using a Load Keys Only relationship prevented the User from linking to an existing Business Object from an Arrangement Tab.
- DR 43951 Blueprints: Fixed an issue where changes made to the Holds property on a Field did not persist.
- DR 43956 Scheduler: Fixed an issue where editing a scheduled item in CSM Administrator changed the Next Due Date to be the date that the scheduled item was originally created. This caused the Scheduler incorrectly execute the scheduled item.
- DR 43965 CSM: Fixed Definition saving issue where the last modified date was not getting set to new values if it had been set previously.
- DR 43978 CSM: Fixed an issue that could cause the CSM Desktop Client and Administrator Client to freeze when starting up on Windows 7.
- DR 43988 One-Step™ Actions: Fixed an issue that prevented values from being saved during Supporting Object updates when a category was used. Also fixed an issue where the Template field was automatically selected when another field should have been selected.
- DR 43994 Dashboards: Improved the Browser Client loading performance for Bar, Column, Line, and Scatter Chart Widgets.
- DR 44005 Portal Localization: Fixed an issue where the search functionality was broken for some localized instances of the Customer Portal running the newer "Cards with Search" style service catalog.
- DR 44011 Report Groups: Fixed issue where Users without specific field rights in a Search Group could not run reports on that Search Group even if the Search right was allowed. Fixed issue where a User could export a report even if they could not view it due to security rights.
- DR 44052 Action Commands: Fixed an error that occurred when Users accessed pinned commands.
- DR 44069 Browser Client: Fixed an issue where displaying a Visualization resulted in an error message if the Object using Visualization did not have an associated icon.
- DR 44092 One-Step™ Actions: Fixed an issue that caused the Define a Decide Between Multiple Cases Action to sometimes use the incorrect case when executed.
- DR 44101 Expressions, One-Step™ Actions: Fixed an issue in the Business Object Form where disabled Expression criteria on an Image Control were not dynamically calculating when it was associated to a One-Step Action. This problem occurred on the CSM Browser Client and Portal.
- DR 44114 Event Monitor, Trusted Agents: Fixed an issue where the Email and Event Monitor server application, when configured as a Trusted agent, would not recover from the IIS application pool being stopped and restarted.
- DR 44119 CSM Web Applications: Fixed an issue that prevented Prompts from showing JSON data when display columns are specified and the column names in the array do not use camel casing.

- DR 44136 Browser Client: Fixed an issue where Date, Time, and Date/Time controls would not display properly when Control Visibility was set.
- DR 44151 CSM Administrator: Fixed an issue where the scrollbar was missing in the Security > Teams and Workgroups dialogs, so some entries were not visible.
- DR 44155 Security: Fixed an issue where clicking Cancel after viewing a custom Query in the Security Groups dialog box deleted the Related Clause.
- DR 44181 Automation Processes: Fixed an issue where some Automation Processes failed during execution.
- DR 44184 Outlook Add-In: Fixed an issue that prevented Users from creating new incidents in Outlook in systems where Globalization was not enabled. If reading pane display issues occur after the upgrade to CSM 9.5.0, verify that the "Optimize for Compatibility" Display Settings is set.
- DR 44185 Cherwell Mobile: Fixed issue that was causing CherwellService to crash when accessing Dashboards on the Android mobile client, which resulted in no mobile clients being able to connect to a server until CherwellService was restarted.
- DR 44187 Dashboards: Removed unneeded code being used by the web applications which could have been causing issues under large user load.
- DR 44192 Mail Delivery Service: Fixed an issue where the Mail Delivery Service could lock up when too many messages are queued.
- DR 44213 Globalization: The list of available cultures no longer includes the internal Trebuchet Invariant culture (Invariant (Cherwell) (treb-inv)).
- DR 44216 Security: General security fix.
- DR 44218 Toolbars: Fixed an issue that could cause errors when adding, editing, or deleting custom toolbars.
- DR 44244 Relationships: Fixed an issue that caused duplicate rows when a related object was the same as the parent object and constraints were used to limit data.
- QWIK-106 External Connections: Fixed an error where the SQL Server was trying to use an invalid date when querying the small date time data type during an import from an external system.
- QWIK-114 External Connections, Globalization: Fixed an issue where if performing an external data import using a filter on a foreign key validated field, the filter tried to resolve foreign key validation. The filter will now search on the literal values.
- QWIK-163 Logging: Fixed an issue where the Browser Client and Customer Portal shared a singular logging file, which could result in an issue where logs were unable to be written to disk for either application. Now, when selecting a location for the log file for the Browser Client and Customer Portal, the logging path will automatically be modified using the application name.

CSM 9.5.1 Fixes List

CSM 9.5.1 Release Notes: this list describes fixed issues that were reported in previous releases.

- CSM-37823 REST API: Fixed an issue with special character HTML encoding remaining on fields while saving or updating a Business Object.
- CSM-38355 Browser Client and Portal: Removed a line that would sometimes appear in the middle of Form Arrangements.
- CSM-39092 Visualizations: Fixed an issue where the web client visualizations diagram was not displaying all the relationship nodes of the primary Business Object.
- CSM-39352 Browser Client: Fixed issue where plain text values could be improperly encoded for HTML display.
- CSM-40609 Trusted Agents: Fixed issue that caused new LDAP mappings created from Business Object properties to save improperly, resulting in LDAP mappings that were missing critical data and causing problems when importing users from an Active Directory.
- CSM-40181 One-Steps: Fixed an issue that caused certain e-mail One-Step Actions to fail when adding an attachment prior to sending the message.
- DR 43833 CSM: General security fix.
- DR 44207 E-mail: Fixed an issue where the cursor was misplaced when opening e-mail templates larger than the e-mail dialog box.
- DR 44339 One-Step Actions: Fixed an issue that caused One-Step Action system functions to disappear when used in various Actions in the One-Step editor. This occurred when upgrading to CSM 9.5.0 from an old database.
- DR 44368 Browser Client: Fixed an intermittent issue with the web applications that was caused by a collision of clean-up code.

CSM 9.5.2 Fixes List

CSM 9.5.2 Release Notes: this list describes fixed issues that were reported in previous releases.

- CSM-41031 Adaptive Layouts: Fixed a Browser Client issue where forms in a Form Arrangement with a vertical splitter and more than one adaptive layout would constantly reload.
- CSM-41060 Application Server: Fixed an issue where the setting to not create an application server recovery file set incorrectly.
- CSM-41510 Adaptive Layouts: Fixed an issue where adaptive Dashboards could get stuck on the smallest layout in non-English cultures.
- DR 27819 Queues: Fixed an issue that truncated the total items in queues count in the Queues task pane.
- DR 39355 Grids: Fixed an issue in the Desktop Client that caused an error when grouping two or more columns then adding a new column to the Grid.
- DR 43825 Browser Client: Fixed an issue where form control borders without a specified weight displayed incorrectly on the Browser client.
- DR 43971 E-mail: Fixed an issue that would prevent attachments from certain emails from being attached to Incidents created via the E-mail and Event Monitor.
- DR 44012 REST API: Fixed an issue in the REST API ad hoc search operation that would set the public ID property to the record ID if the public ID field was not in the specified field list.
- DR 44193 Journals: Fixed an issue where Journal entries describing outgoing e-mail notifications had direction as "not set" instead of "outgoing."
- DR 44265 Browser Client: Fixed an issue in the Browser Client where Users could edit read-only or disabled fields.
- DR 44307 Scheduler: Fixed an issue where changing the name of a scheduled job was not reflected in the Calendar of Scheduled Items. The updated name now displays correctly.
- DR 44390 One-Step Actions: Fixed an issue with load times on the web applications for Business Object form loads when the application pool hasn't loaded any forms before. There should also be an improvement in Dashboard and stored query retrieval under the same first-time conditions.
- DR 44419 Trusted Agents: Fixed an issue where 3-tier Trusted Agent connections errors could cause scheduled imports to fail.
- DR 44442 Widgets: Fixed issue where Dashboard link Widgets would display raw HTML instead of the appropriate title when the link contained an image set.
- DR 44457 CSM: General performance improvements.
- DR 44474 Browser Client: Fixed an issue where setting a Knowledge Article's solution/workaround as an Incident's close description from the Browser Client copied only the plain text; it now copies rich text.
- DR 44522 Globalization: Fixed an issue that caused the System Upgrade tool to fail when upgrading CSM 9.3.x to 9.5.x.

CSM 9.5.3 Fixes List


CSM 9.5.3 Release Notes: this list describes fixed issues that were reported in previous releases.

- CSM-44946 Scheduling: Fixed an issue which could prevent services (Automation Process, Scheduling, or Email Monitor) from starting.
- CSM-45134 Prompts: Fixed an issue where fields with special characters such as apostrophes failed to validate when used in One-Step Action validated prompts.
- DR 43867 Browser Client: Fixed memory leaks when viewing Search Results Grid and Business Object forms.
- DR 44463 One-Step Actions: Fixed an issue that occurred in some specific scenarios in the Browser Client where relationships (such as tasks that are part of a change request) were broken so that One-Step Actions could not add new items to them.
- DR 44481 One-Step Actions: Fixed an issue for "List values from a table and field" custom prompt where some items selected from the table caused an error.
- DR 44486 Related Item Picker: Fixed an issue where, under certain circumstances, a Business Object could get into a state where child items could not be added to empty relationships.
- DR 44562 Fields: Fixed an issue where combo boxes on a Business Object Form with read-only expressions could appear editable after executing a One-Step Action.
- DR 44580 Browser Client: Fixed an issue where files with a specific set of characters in the name would be executed in a new tab instead of being downloaded. Files are now downloaded instead of executed in the browser.
- DR 44597 Automation Processes: Fixed an issue where Automation Process events with Business Object-created triggers would not initiate when the chosen Business Object was a join table Business Object for a Link relationship and was created when the Link relationship was set.
- DR 44612 Accessibility: Fixed an issue that caused validated prompts in One-Step Actions on Cherwell Mobile to display as a text box instead of a list of options.
- DR 44615 One-Step Actions: Fixed an issue with aggregation expressions run between relationships with grouped child objects.
- DR 44645 System Upgrade: Fixed an issue that would prevent upgrade to CSM 9.5.x if certain Journal group members were missing.

System Requirements


Learn about system requirements for CSM clients, servers, and third-party applications.

Minimum System Requirements (Client)

| | |
|---|--|
| System Processor | Dual Core CPU or equivalent (1) |
| System Memory | 3 GB (4 GB or more recommended) |
| Operating System | Windows 10, Windows 8.1 x86 or x64 Pro or Enterprise editions, or Microsoft Windows 7 Service Pack 1 (SP1), x86 or x64 editions |
| Free Disk Space | Minimum: 1.5 GB (2 GB recommended) |
| Networking | Internet access required for online documentation feature |
| Desktop Browser (5) | <p>CSM works with Internet Explorer 11+ and the current versions of the following browsers:</p> <ul style="list-style-type: none"> • Google™ Chrome™ • Firefox • Microsoft Edge • Mac only: Safari |
| Mobile Browser (5) | <p>CSM works with:</p> <ul style="list-style-type: none"> • Safari on the latest version of iOS (version 11) • Chrome on the last two major versions of Android: Nougat (version 7.x) and Oreo (version 8.x) |
| Cherwell Mobile Devices:  Note: Cherwell Mobile applications for iOS and Android were deprecated in March 2019 and are no longer available in their respective application stores. | Cherwell Mobile 2.0 for iOS: iPhone®/iPad®/iPod Touch® (iOS 8.0+) Cherwell Mobile for Android: Android® 4.4+ |
| Other | Microsoft .NET 4.6.2+ |

Minimum System Requirements (Server)

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| System Processor | Dual Core CPU or equivalent (1) |
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| System Memory | 4 GB (6 GB or more recommended). Note that if you have SQL Server® installed on the same server, more RAM is recommended. |
| Operating System | Windows Server 2016, Windows Server 2012 R2, Windows Server 2012, or Microsoft Windows Server 2008 R2 SP1 |
| Free Disk Space | Minimum: 5 GB Recommended: 10 GB |
| Networking | Dual Core CPU or equivalent (1) Internet access required for online documentation feature |
| Database | Microsoft SQL Server 2017, Microsoft SQL Server 2016, Microsoft SQL Server 2014, or Microsoft SQL Server 2012 Database can be on a separate server.  Note: Full-text indexing must be enabled. Requires SQL Standard Edition (minimum), either a Processor License or a Server License with sufficient number of Client Access licenses. |
| Other | Microsoft .NET 4.6.2+ Java SE Runtime Environment 9 (installed automatically with CSM) Internet Information Services (IIS) 7.5+ (required for Web Applications and when hosting the Cherwell Application Server in IIS) (2) |

Other Requirements

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|--------------------------|--|
| Bomgar mApp | Refer to Bomgar Integration mApp documentation. |
| E-mail | Server running SMTP and POP or IMAP, Microsoft® Exchange 2016, Microsoft® Exchange 2013, or Microsoft® Exchange 2010 |
| LDAP | Microsoft Active Directory® 2003+, Novell® eDirectory™. Other LDAP servers might allow some/all functionality. |
| Trusted Agent Server (3) | Dual Core CPU or equivalent (1); 4 GB (6 GB or more recommended); 1 GB free disk space; Microsoft 2008 Server R2 SP1, Server 2012, Server 2012 R2, Server 2016 |

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| Load Balancing (3) (4) | Redis® Server 2.8.x or Redis® Labs Enterprise Cluster (RLEC), any version. |
|------------------------|--|

Notes

1. Recent model required.
2. If you host the Cherwell Application Server in IIS, Windows Communication Foundation (HTTP and Non-HTTP Activation) components are also required.
3. Optional. The Trusted Agent Server, Redis® Server, and Redis® Labs Enterprise Cluster are installed separately from the CSM server.
4. Testing was performed against open source Redis 2.8. No known compatibility issues exist with later Redis versions, however.
5. CSM may work with other browsers, but certain features may not be available or may not work as expected.

Revision History

A list of CSM revisions by date and changes.

| Revision | Date | Changes |
|----------|---------------|--|
| 9.5.3 | April 2019 | Software fixes. For a list of fixes, see CSM 9.5.3 Fixes List . |
| 9.5.2 | February 2019 | Software fixes. For a list of fixes, see CSM 9.5.2 Fixes List . |
| 9.5.1 | December 2018 | Software fixes. For a list of fixes, see CSM 9.5.1 Fixes List . |
| 9.5.0 | November 2018 | <p>Platform changes:</p> <ul style="list-style-type: none"> • Trusted Agents for One-Step™ Actions • Translatable platform strings • Multi-byte support for Language Packs • Camera and location services added to the Browser Client • Print Action support for Web Applications <p>OOTB content changes:</p> <p>Site and Building management</p> <p>For additional features, see What's New in CSM 9.5.0.</p> |

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| 9.4.0 | July 2018 | <p>Platform changes:</p> <ul style="list-style-type: none"> • Adaptive Layouts functionality for Dashboards • Common One-Step™ Action execution engine • Enhanced Prompts and Prompts Manager • Cherwell Rest API Named Object Operations • Enhanced Cherwell documentation portal: Product Documentation <p>OOTB content changes:</p> <p>Task as a Group Business Object</p> <p>For additional features, see What's New in CSM 9.4.0.</p> |
| 9.3.2 | April 2018 | <p>Software fixes.</p> <p>For a list of fixes, see CSM 9.3.2 Fixes List.</p> |
| 9.3.1 | February 2018 | <p>Software fixes.</p> <p>For a list of fixes, see CSM 9.3.1 Fixes List.</p> |
| 9.3.0 | December 2017 | <p>Platform changes:</p> <ul style="list-style-type: none"> • Adaptive Layouts for Forms • Support for Trusted Agents for e-mail • Multi-tab browsing support • Modal design update • E-mail attachments handling improvements <p>OOTB content changes:</p> <ul style="list-style-type: none"> • Globalization enabled by default • Customer Portal Dashboard design • Customer Portal Form design • Adaptive Layouts for Portal Forms <p>For additional features, see What's New in CSM 9.3.0.</p> |

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| 9.2.0 | August 2017 | <p>Platform changes:</p> <ul style="list-style-type: none"> • New Globalization support management tool • Foreign key support for validated and auto-populated Fields • Definition Reviewer • Enhancements to Browser Client and Customer Portal User Interface • New Download a Blueprint Button <p>OOTB content changes:</p> <ul style="list-style-type: none"> • Service Catalog and search improvements • Localized OOTB content <p>For additional features, see What's New in CSM 9.2.0.</p> |
| 9.1.0 | March 2017 | <p>Platform changes:</p> <ul style="list-style-type: none"> • Concurrent development for Blueprints • Accessibility improvements for CSM Web applications • New Team Operations for the Cherwell REST API • New Modifiers |
| 9.0.1 | February 2017 | <p>Platform changes:</p> <ul style="list-style-type: none"> • One-Step™ Action Annotations • Guidance for CSM system design using concurrent development • Trusted Agents for bulk data imports • Trusted Agents for request routing and fault tolerance • Trusted Agents Hub scale-out using Redis <p>For additional features, see What's New in CSM 9.0.1.</p> |
| 8.3.1 | November 2016 | <p>Platform changes:</p> <ul style="list-style-type: none"> • Continual Service Improvements • Context-sensitive help for Windows clients <p>OOTB content changes:</p> <p>Service Catalog Template functionality enhancement</p> |

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|-------|------------|--|
| 8.2.1 | July 2016 | <p>Platform changes:</p> <ul style="list-style-type: none"> • New One-Step™ Action branching • Service Health Monitor • Grid exporting enhancement • Auto-Deploy enhancement • Platform support <p>OOTB content changes:</p> <ul style="list-style-type: none"> • Incident functionality enhancement • New company logo • Internal customer security upgrade <p>For additional features, see What's New in CSM 8.2.1.</p> |
| 8.1.0 | March 2016 | <p>Platform changes:</p> <ul style="list-style-type: none"> • Field-level encryption and view auditing • Card view display • Cherwell Mobile for iOS enhancement • New documentation platform <p>OOTB content changes:</p> <ul style="list-style-type: none"> • New license usage functionality • New view of Pending Status details • Incident Resolution from Problem improvements • Business Object Grids updates • Portal enhancements <p>For additional features, see What's New in CSM 8.1.0.</p> |

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|-----------|----------------|---|
| 8.00 | December 2015 | <p>Platform changes:</p> <ul style="list-style-type: none"> • Desktop Client and Administrator improvements • Browser Client improvements • HTTP-based RESTful API • JSON support for One-Step™ Actions <p>OOTB content changes:</p> <ul style="list-style-type: none"> • Portal improvements • New Dashboards • Specifics Forms <p>For additional features, see What's New in CSM 8.00.</p> |
| 7.00 Rev1 | October 2015 | Software fixes. |
| 7.00 | September 2015 | <p>Platform changes:</p> <ul style="list-style-type: none"> • Performance Health Check tool • Trusted Agent Server Integration feature • Enhanced SAML integration • Blueprint scan alerts <p>OOTB content changes:</p> <ul style="list-style-type: none"> • IT Management Dashboards • Change Management Dashboards • Automatic Incident escalation <p>For additional features, see What's New in CSM 7.00.</p> |
| 6.00 Rev1 | August 2015 | Software fixes. |

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| 6.00 | July 2015 | <p>Platform changes:</p> <ul style="list-style-type: none"> • One-Step improvements • New Dashboard Chart Widget types • Theme improvements and Portal support • Browser and Portal updates • Browser usability <p>For additional features, see What's New in CSM 6.00.</p> |
| 5.00 Rev2 | October 2014 | Software fixes. |
| 5.00 | July 2014 | <p>Platform changes:</p> <ul style="list-style-type: none"> • mApp Solutions • mApp Solutions and Integration page • Business Intelligence enhancements • One-Step enhancements • Advanced record locking <p>For additional features, see What's New in CSM 5.00.</p> |
| 4.60b | November 2013 | Software fixes. |
| 4.60 | June 2013 | <p>Platform changes:</p> <ul style="list-style-type: none"> • Rich Text support • Bomgar platform integration • Ease-of-Use/Look-and-Feel enhancements • Embedded Forms • Grid enhancements <p>For additional features, see What's New in CSM 4.60.</p> |
| 4.31 | February 2013 | <p>Platform changes:</p> <ul style="list-style-type: none"> • iCherwell enhancements • Widget enhancements • New Dashboards • Portal and Browser enhancements |

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|----------|---------------|--|
| 4.30 | November 2012 | <p>Platform changes:</p> <ul style="list-style-type: none">• SAML Support• Grid enhancements• Portal and Browser Client enhancements• CSM Manager enhancements• Form Editor enhancements <p>For additional features, see What's New in CSM 4.3.</p> |
| 4.0 Rev2 | August 2012 | Software fixes. |
| 4.0-1 | July 2012 | Software fixes. |
| 4.0 | April 2012 | <p>Platform changes:</p> <ul style="list-style-type: none">• Cherwell Portal• Cherwell Browser Client• Searching• Action Catalogs• Security enhancements |

CSM Documentation Archive

The Product Documentation portal provides a single point of entry for Cherwell products starting with CSM 9.3.0. Older versions of product documentation are available, however.

Documentation for previous versions of Cherwell products can be found at these locations:

- [CSM 9.2.0](#)
- [CSM 9.1.0](#)
- [CSM 9.0.1](#)
- [CSM 8.3.2](#)
- [CSM 8.2.1](#)
- [CSM 8.1.0](#)
- [CSM 8.00](#)
- [CSM 7.00](#)