



What's New in CSM 9.6.0?

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The Cherwell Software product suite includes:

- Cherwell Service Management
- Cherwell Asset Management

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Overview of What's New in CSM 9.6.0

Links to community-suggested features on the [Cherwell Ideation Station](#) are provided when available. You must create an account and be logged in to view ideas. Additionally, links to "Learn more ..." about the feature are provided at the bottom of most sections.

Activity Pane

You can now quickly view important activities for Major Business Objects using a new Form Arrangement tab called the Activity Pane.

P3 INCIDENT 102256
Printing > Network > Submit Incident

STATUS	RESPONSE BREACHED	RESOLUTION BREACHED	CUSTOMER
Reopened Next: Begin Work	3/18/2019 3:31 PM	3/18/2019 3:33 PM	Josh Wilk Josh Wilk

Overview **Activity** Journals Task (0) Customer History (1) Similar Incidents (3) Related CIs (0)

[Create Note](#)

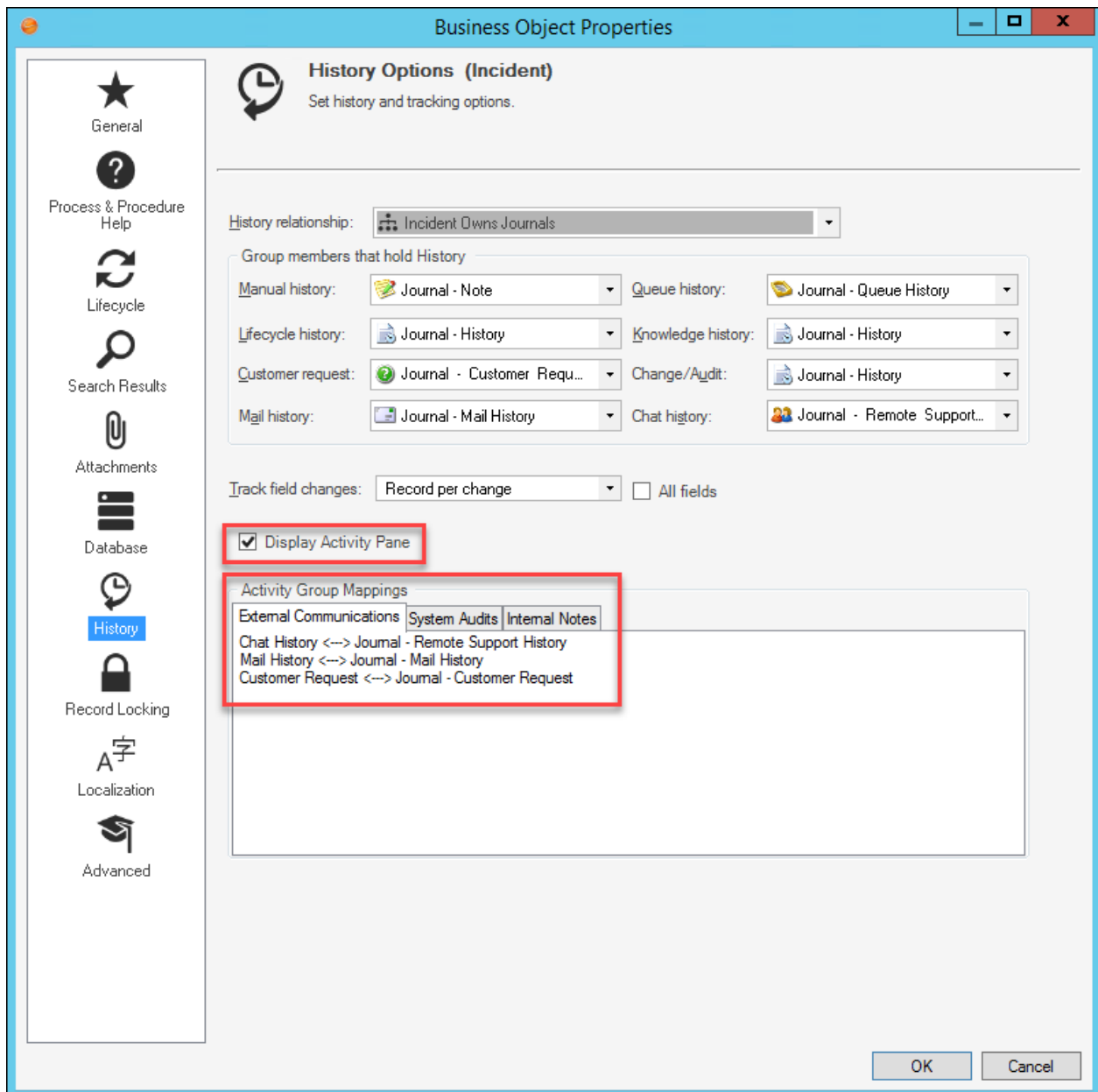
All Internal Notes External Communications System Audits Pinned

Search... Newest to Oldest ▼

Audit ⋮
Clair Wu
3/31/2019 7:14:04 PM
The value in the field Requester Department was set from the value IT to the value IT on 12/16/2018 by clair.

Audit ⋮
Clair Wu
3/31/2019 7:14:04 PM
The value in the field SLA Name for Customer was set from the value Gold to the value Gold on 12/16/2018 by clair.

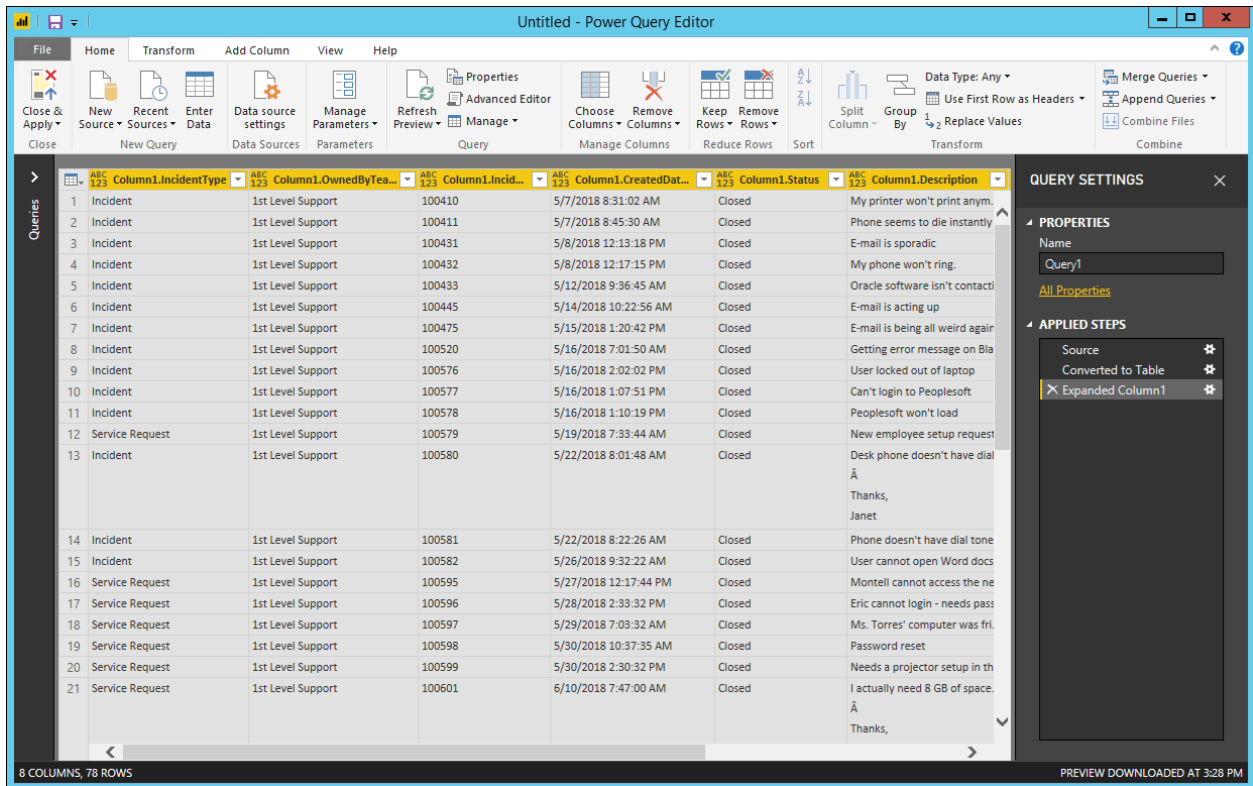
You can activate the Activity Pane in any Major Business Object by editing the Business Object properties. In the History Options page, select the Display Activity Pane checkbox and use the Activity Group Mappings section to see how the Supporting Object fields will relate to the information displayed in the Activity Pane.



[Learn more ...](#)

Third-Party Reporting Tools and Search Data

CSM now supports the use of third-party tools by retrieving search data using the Cherwell REST API. Use the provided Data Connectors to pull data from a Saved Search into the third-party tool for reporting and analysis. CSM can connect to Microsoft Power BI Desktop and Tableau Desktop. Use these tools to visualize the data in the following ways: reports, dashboards, charts, or graphs.



[Learn more ...](#)

Quick Search and Knowledge Search Results - Sort By Relevance

[Ideation Station Feature](#)

[Ideation Station Feature](#)

[Ideation Station Feature](#)

[Ideation Station Feature](#)

[Ideation Station Feature](#)

CSM provides an extremely powerful search engine that now allows you to run a single-use **Quick Search** or **Knowledge Search** with results sorting according to their **Relevance**. This means that the records most likely to be relevant to your search string display at the top of the results. This new feature is implemented in the CSM Desktop Client, CSM Browser Client, and CSM Portal.

The screenshot shows the Cherwell Service Management interface. At the top, there's a navigation bar with 'cherwell SERVICE MANAGEMENT' and user information 'Cherwell Admin'. Below that, a search bar contains the text 'computer'. A 'Search Settings' panel is open on the right, with a red box highlighting the 'Sort By' dropdown menu, which is set to 'Relevance'. The main content area displays a list of knowledge articles, with the first one titled 'CONNECT THE BLACKBERRY 8800 TO A COMPUTER'.

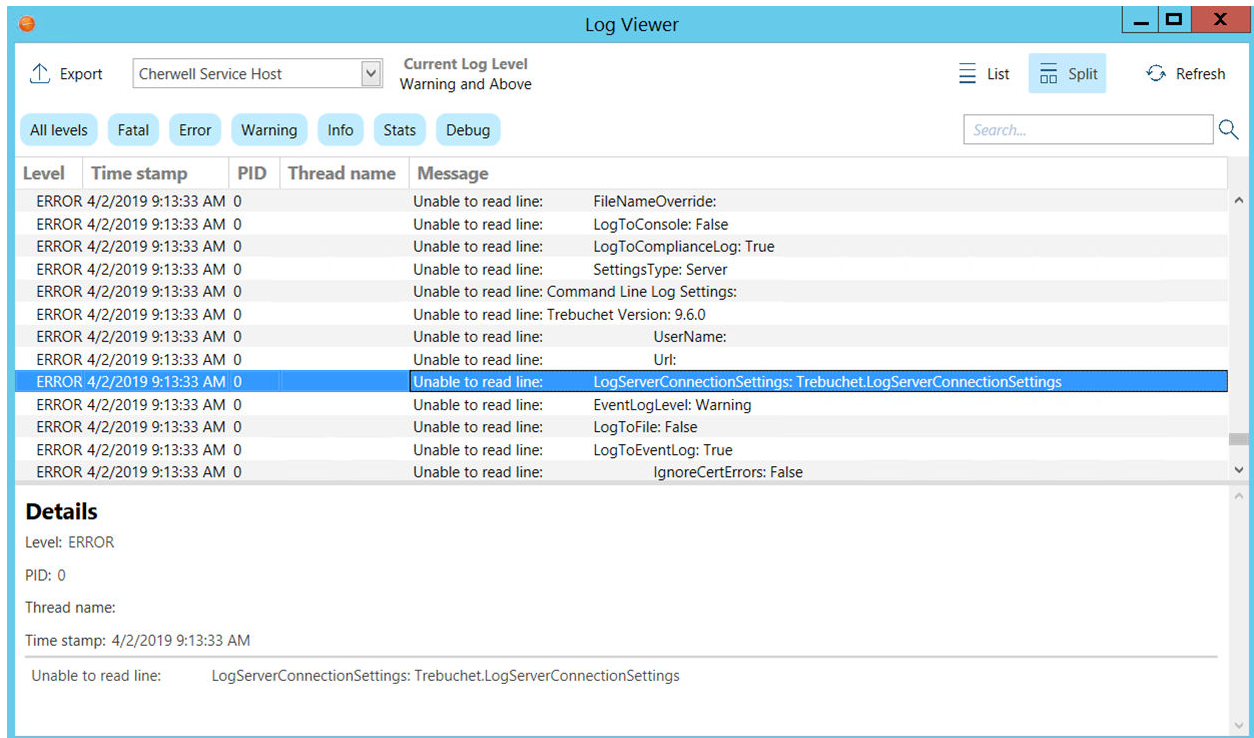
Relevance is always the default sort order when searching records for *all* Business Objects. When searching records for a *specific* Business Object, you can modify the **Sort By** selection, but the modified setting only applies to the current search session. When you start a new **Quick Search** or **Knowledge Search**, the default sort order returns to **Relevance**.

[Learn more ...](#)

Log Viewer in CSM Administrator

Ideation Station Feature

You can now view logs in CSM Administrator. Using the Log Viewer Utility, you can switch between logs, filter by log level, search, and export logs. You'll need to configure to log to files in the Cherwell Server Manager. SaaS customers must to contact Cherwell Support for assistance in getting these settings configured.



[Learn more ...](#)

Queuing for CSM Services

Ideation Station Feature

Queues have been added to distribute the workload for these microservices: Automation Processes, E-mail and Event Monitor, Scheduling, and Mail Delivery. This enables horizontal scaling for CSM Services.

The microservices process work and use queues to distribute workload to provide increased throughput. Each microservice has a single queue and you can distribute microservices across multiple servers to enable horizontal scaling that allows work to be consistently distributed.

The Cherwell Service Host, its four microservices, and Cherwell Message Queue Service are automatically installed with the Server Installation, but you can choose which microservices to enable by default. You can later enable or disable microservices and configure logging for each microservice in the Cherwell Server Manager.

[Learn more ...](#)

Themes for Action Catalogs

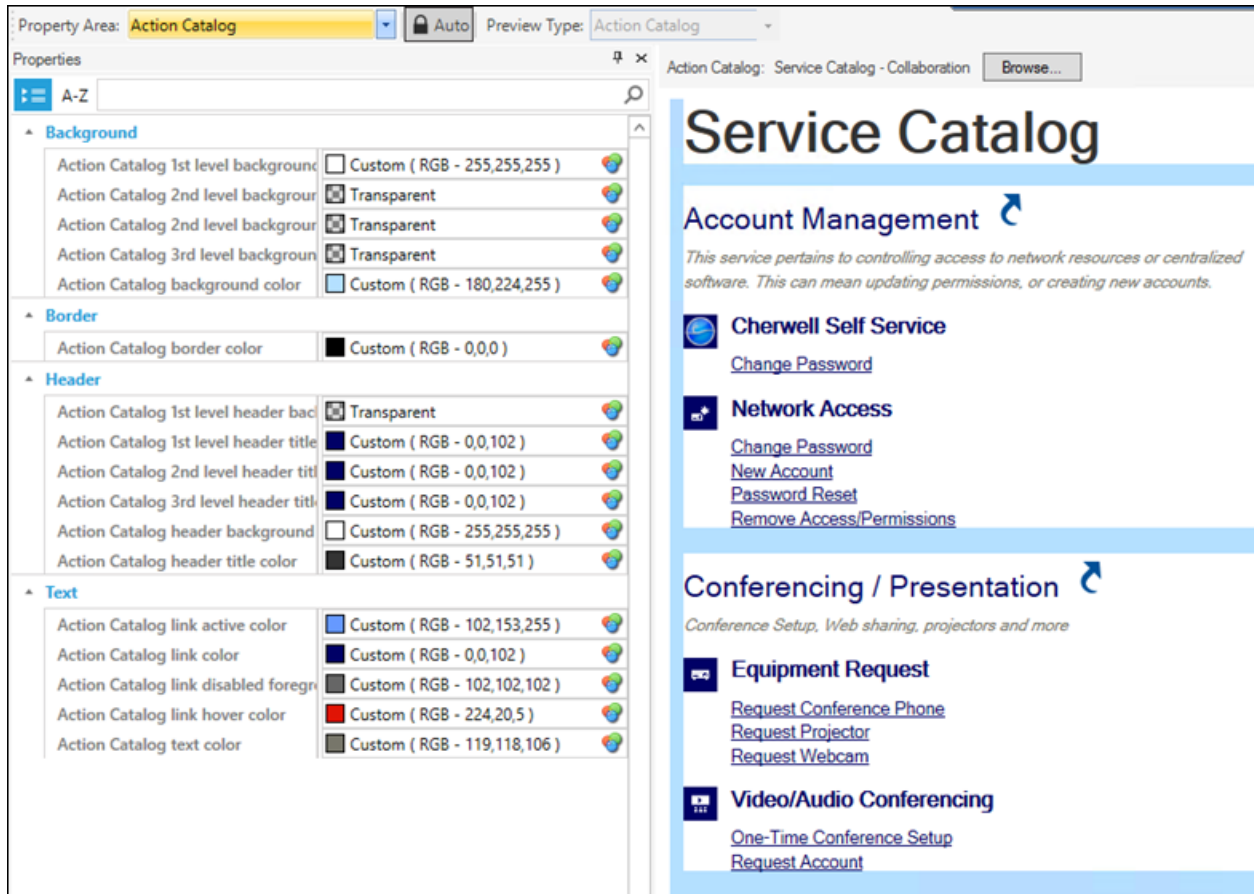
Ideation Station Feature

Ideation Station Feature

Ideation Station Feature

Ideation Station Feature

You can now apply Themes to Action Catalogs instead of relying on the Definition Editor for choosing colors. Select an existing Theme in the Action Catalog Editor, or use the Theme Manager to build or edit a Theme. You will have more detailed control over the appearance of your Action Catalogs to ensure a more cohesive look and feel to your CSM implementation. Like the other property areas, you can preview your Theme changes as you work.



[Learn more ...](#)

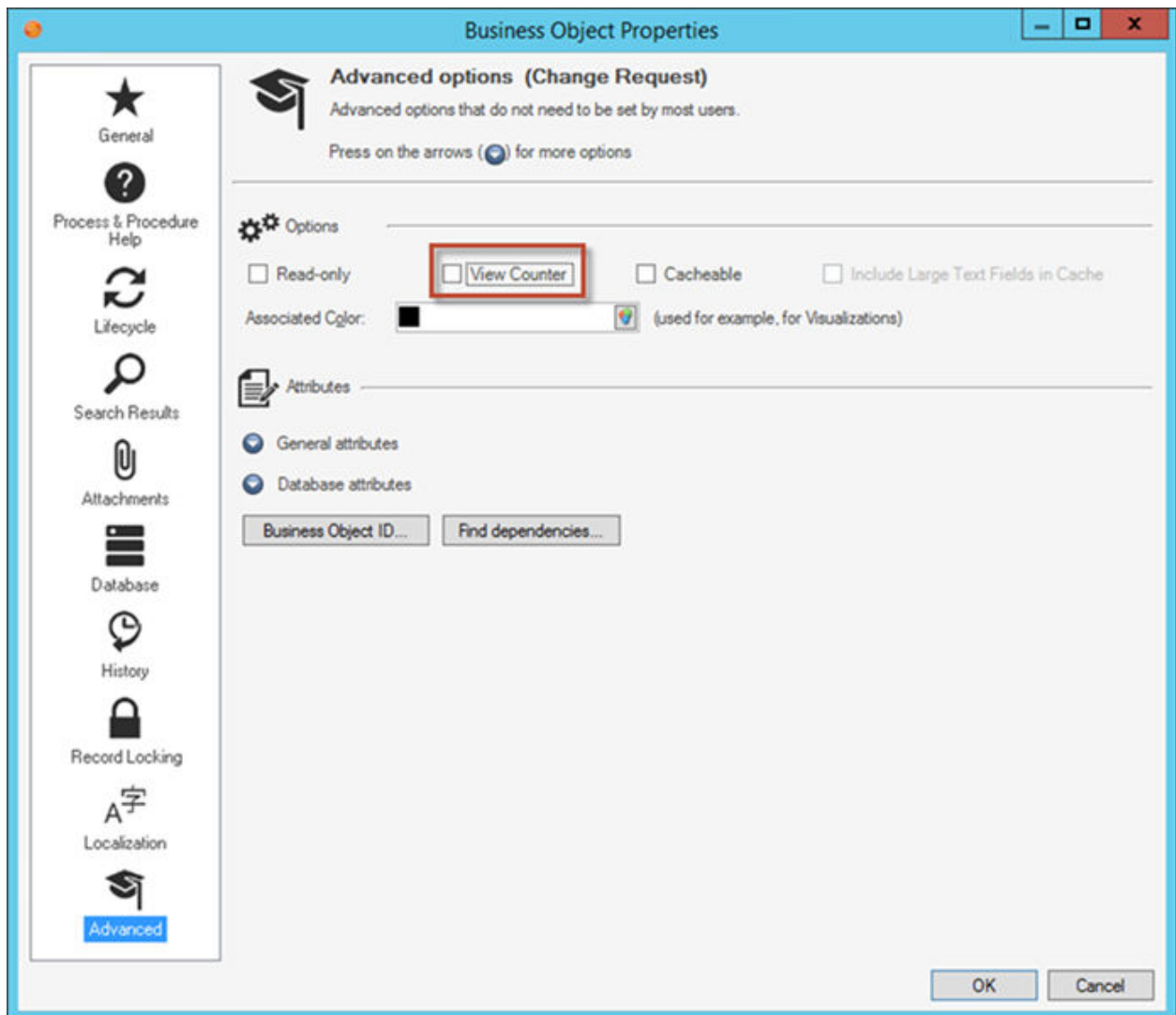
View Counter for Business Objects

Ideation Station Feature

The new View Counter allows you to incrementally track record views in a Major Business Object. This feature adds two read-only fields to the object: Portal View Count and Technician View Count. The Portal View Count tracks the number of times a record is viewed in the Customer Portal, and the Technician View Count tracks the same information for the Desktop Client and Browser Client. The count increments when a User or Customer opens a record by:

- Selecting a Quick Search result.
- Selecting a Saved Search result.
- Selecting a result from the Knowledge Pane.

- Clicking the GoTo button in the Form Arrangement.
- Clicking the Quick View button in the Form Arrangement.
- Using a deep link.
- Using the Command Line.



Web Applications Improvements

- **Anonymous Access in CSM Portal**
CSM administrators can now configure Portal Sites to allow Anonymous Users to view records. Examples of configurable view options include:
 - Search the Portal and view results (e.g., Knowledge Articles)

- Click a direct link to go directly to a specific record or dashboard

Administrators can also limit records available to Anonymous Users by configuring a custom query for the Business Object. Anonymous Users only have the ability to *view* records. Login is required for Users who want to interact with or edit records in the Portal.

[Learn more ...](#)

- **Google Analytics for the CSM Portal**

- Ideation Station Feature*

You can now track usage, including mouse clicks, in the CSM Portal using Google Analytics.

For example, you can track:

- User logins
- Portal Site usage
- Dashboard usage
- Service Catalog, including categories and services, usage
- Searches (from the toolbar Quick Search only)
- Action Link clicks from the home page

There are many ways to leverage Google Analytics data to track CSM Portal use. For example, you can create a view to track data for the Portal IT Site. You can see page views for all pages for that Site for a specific time period or you can filter the list of pages to specific areas, such as the Service Catalog.

Primary Dimension: Page Page Title Other

Plot Rows Secondary dimension Sort Type: Default Advanced Filter ON

Include Page Containing /IT/Service-Catalog

and

+ Add a dimension or metric

Apply cancel

	Page ?	Pageviews ?	Unique Pageviews ?	Avg. Time on Page ?	Entrances ?	Bounce Rate ?
		% of Total: 17.69% (667)	% of Total: 18.86% (472)	Avg for View: 00:02:05 (-62.83%)	% of Total: 0.43% (232)	Avg for View: 14.22% (-100.00%)
<input type="checkbox"/>	1. /IT/Service-Catalog	(50.00%)	(35.96%)	00:00:51	0 (0.00%)	
<input type="checkbox"/>	2. /IT/Service-Catalog/Cherwell-Self-Service	(14.41%)	(17.98%)	00:01:27	0 (0.00%)	
<input type="checkbox"/>	3. /IT/Service-Catalog/Cherwell-Self-Service/Change-Password	(11.86%)	(15.73%)	00:01:21	0 (0.00%)	
<input type="checkbox"/>	4. /IT/Service-Catalog/Account-Management	(2.54%)	(3.37%)	00:00:03	0 (0.00%)	
<input type="checkbox"/>	5. /IT/Service-Catalog/Account-Management/Cherwell-Self-Service	(2.54%)	(3.37%)	00:00:05	0 (0.00%)	
<input type="checkbox"/>	6. /IT/Service-Catalog/Account-Management/Cherwell-Self-Service/Change-Password	(2.54%)	(3.37%)	00:01:24	0 (0.00%)	
<input type="checkbox"/>	7. /IT/Service-Catalog/Computer	(2.54%)	(2.25%)	00:00:06	1 (100.00%)	
<input type="checkbox"/>	8. /IT/Service-Catalog/Network-Access	(2.54%)	(3.37%)	00:00:08	0 (0.00%)	

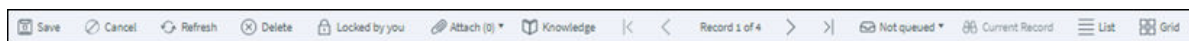
For detailed guidance, refer to the [Google Analytics documentation](#).

[Learn more ...](#)

- **Browser Client Toolbar Redesign**

Business Object, Form Arrangement, and Grid toolbars in the Browser Client have been redesigned.

Business Object Toolbar:



Form Arrangement Toolbar:



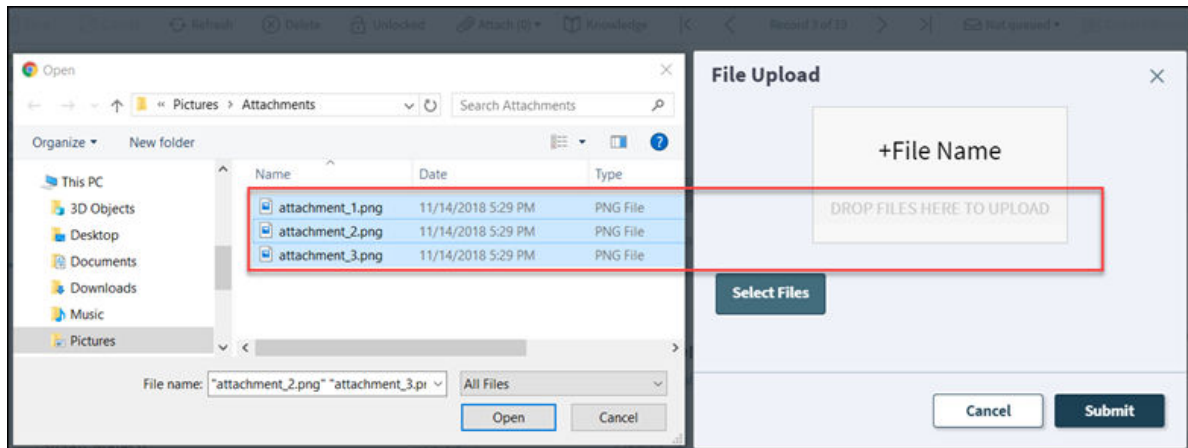
Note: Icons and text have been updated for the Portal, but User-selected colors and fonts will not change.

- **Upload and Download Multiple Attachments**

[Ideation Station Feature](#)

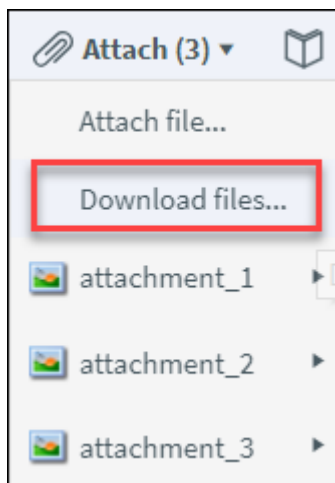
[Ideation Station Feature](#)

You can now upload multiple file attachments at once using multi-select and drag and drop in the Browser Client and Portal for Business Objects, Document Repository, and E-mail.



Ideation Station Feature

You can now download all Business Object attachments at once in the Browser Client and Portal. The files download as a single zip file, which can then be extracted as separate files. Attachments must be saved to the Business Object to be downloaded as a part of the zip file.



[Learn more ...](#)

- **Delete Attachments**

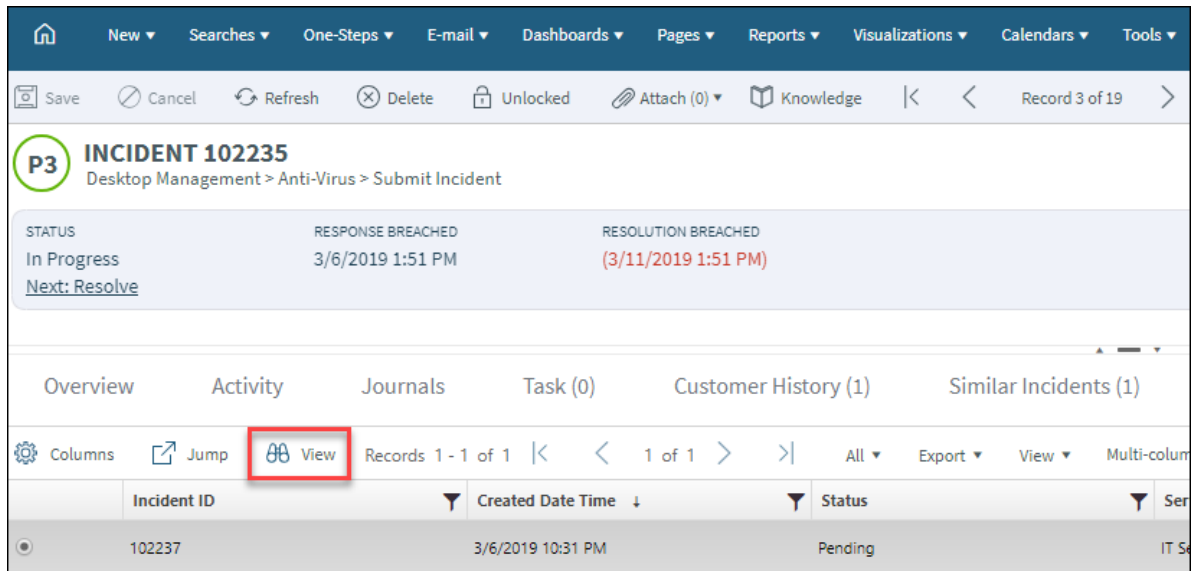
Ideation Station Feature

Users with rights to delete attachments from Business Objects can now do so in the CSM Browser Client and Portal.

[Learn more ...](#)

- **Quick View for Records Opens in Full View**







In the CSM Browser Client, you can now click **Quick View** to view a record in a new tab, in full view, with full form, form arrangement, and toolbar functionality.



• **Web Applications Form Splitters**

Ideation Station Feature

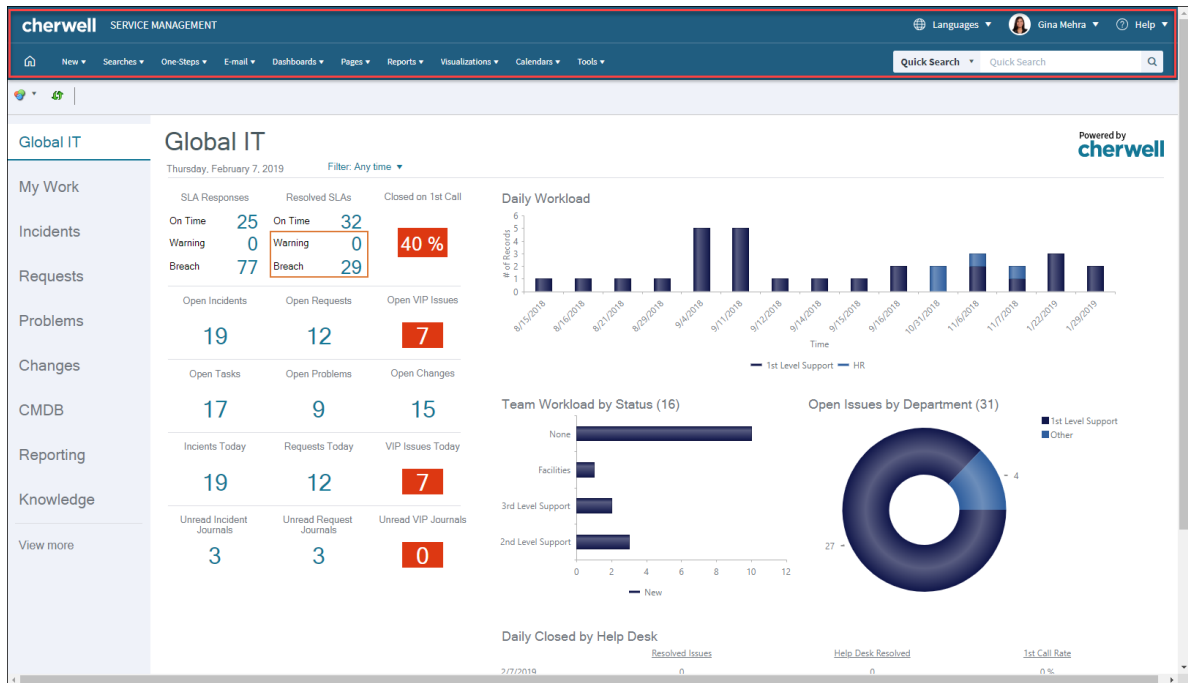
The web applications Form splitters buttons/icons have been updated to enable Users to more easily show/hide the Form Arrangement, adjust the size of the Form Arrangement, or show/hide child objects.

Button/Icon	Action
 Or 	Show or Hide Form Arrangement
 Or 	Separators
 Or 	Show or Hide Child Object Details

[Learn more ...](#)

• **Cherwell Branding**

In the CSM Browser Client and CSM Portal, the header, menu bar, and app bar, including color, font, hover style, logo, and menu structure were updated to be in line with branding guidelines.

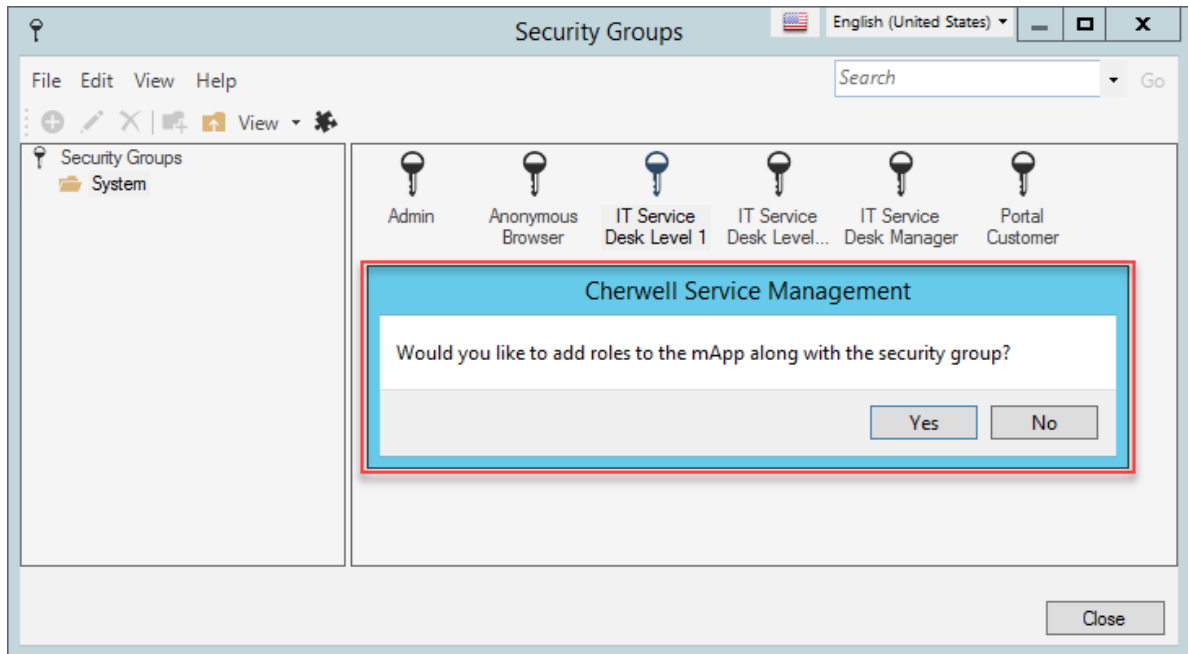


Improved Portability Through Blueprints and mApp Solutions

- **Security Configuration for mApp Solutions**
Ideation Station Feature

You can now add pre-defined Security Groups and/or Roles to mApp Solutions. This enables you to configure security rights in one CSM system and transfer them to another CSM system using a mApp Solution.

Use the new Security Groups Manager and Roles Manager (available for mApp Solutions only) to add these items to a mApp Solution. When you add a Security Group, you are given the option to add associated Roles at the same time.



You can overwrite or import Security Groups and or Roles when mApp Solutions are applied, but you cannot merge these items.

Users assigned to Security Groups are not added to mApp Solutions, so you must manually assign Users to Security Groups after a mApp Solution is applied.



Note: Because Security Groups and/or Roles may impact security rights in the target database after the mApp Solution is applied, be sure to carefully review the merge actions and target items for Security Groups and Roles when you apply the mApp Solution. To ensure that you understand the implications of applying security changes included in the mApp Solution, we strongly advise you to apply the mApp Solution to a test environment and verify the security changes before you commit the mApp Solution to a production environment.

[Learn more ...](#)

- **Additional Feature Managers Added to 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:

- Attachments
- HTML Page Manager
- Language Packs
- Queues
- Roles (for mApp Solutions only)

- Scheduled Items
- Security Groups (for mApp Solutions only)
- Twitter Accounts
- **Versioning mApp Solutions**
When creating a new mApp Solution or updating an existing mApp Solution, you can specify a version. Enter the version number for your mApp Solution in the New Distribution Version field on the Final Preparation for mApp Solution Distribution dialog box.

Final Preparation for mApp Distribution

Your mApp is now ready for distribution

Versioning

Current Distribution Version: 1.0 New Distribution Version:

Use this area to specify the mApp version to be displayed in distribution

Location for mApp Blueprint File

mApp Blueprint file: ...

This file can be used if you want to edit the mApp in the future

Location for Prepared mApp File

Prepared mApp file: ...

Create compressed file

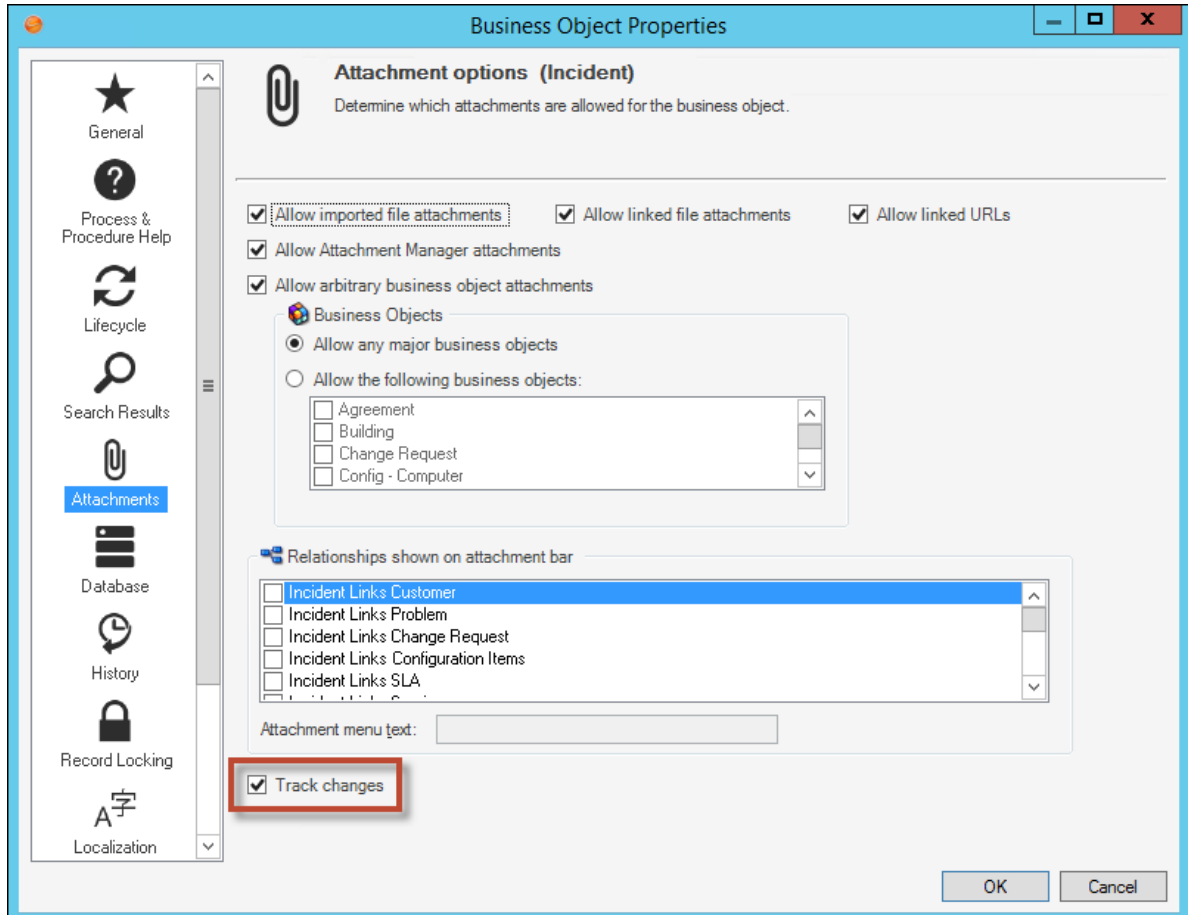
This file is distributed to those who want to install the mApp on their system

OK Cancel

Business Object Administrative Improvements

- **Audit Log for Attachments for a Business Object**
Ideation Station Feature

You can now create an audit log when adding, removing, or updating/changing Attachments for a Business Object. Select the Track changes check box to create a Journal-Note in the Form Arrangement to show the changes.

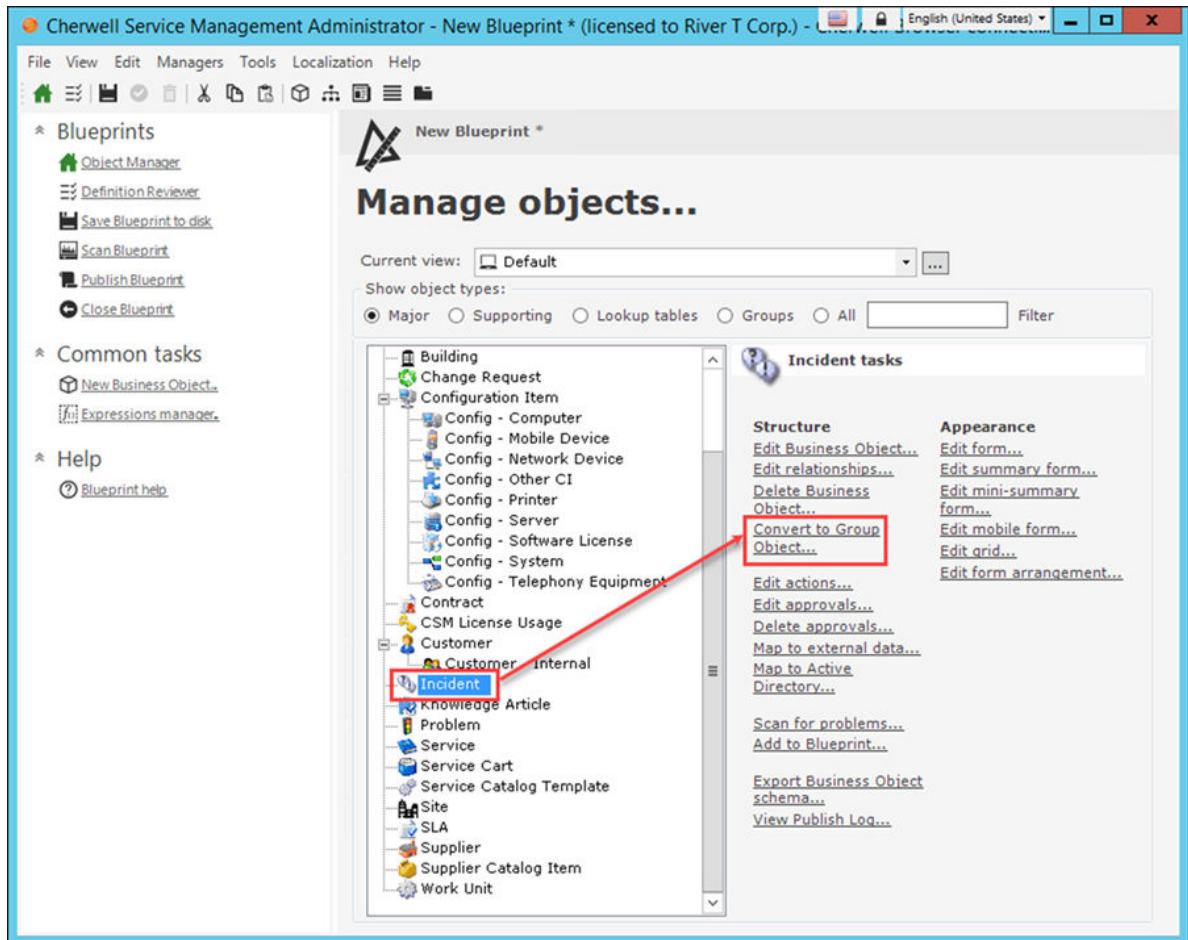


[Learn more ...](#)

- **Convert to a Group Business Object**

You can now share a set of common items (Fields, Relationships, Actions, and a default Grid) with other Business Objects by converting any Major or Supporting Business Object into a Group Object. You can convert a Business Object to a Group Object from a Blueprint or from a mApp Solution.

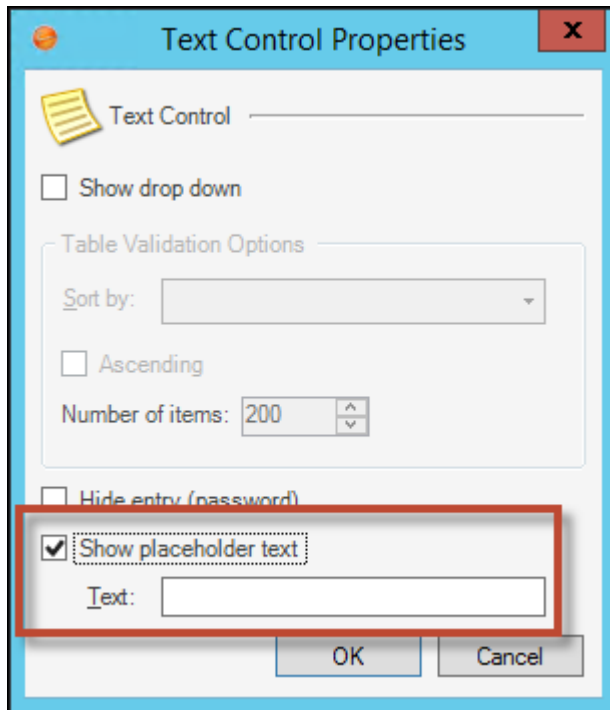
After conversion, the converted Business Object becomes a Group Member of a newly created Group Leader. All relevant properties of the converted Business Object are applied to the Group Leader. This includes items such as Fields, stored Expressions, and Relationships. All existing records in the converted Business Object are associated with the new Group Member.



[Learn more ...](#)

- **Placeholder Text for Text Field Form Controls**
Ideation Station Feature

You can now add placeholder text to a Text Field Control on a Form. Select the Show Placeholder Text check box to add help/starter text that disappears after a User enters data.



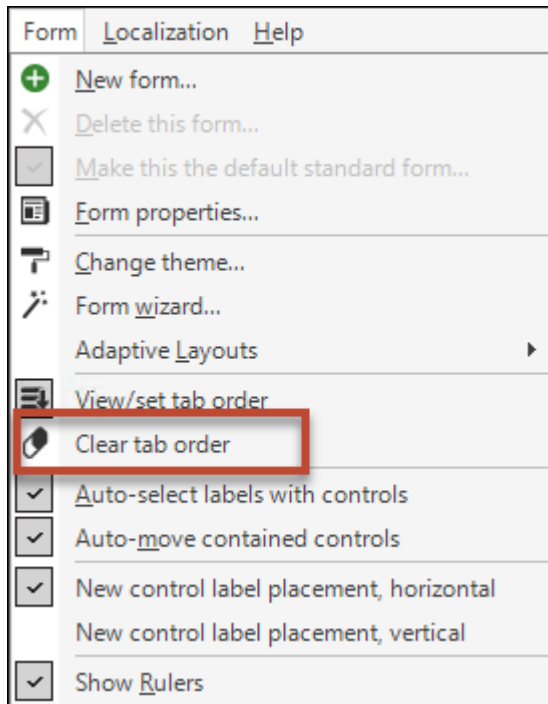
[Learn more ...](#)

- **Clear Tab Stops on Forms and Dashboards**


- *Ideation Station Feature*

Existing tab stop indexes can now be cleared on Forms and Dashboards.

- From the Form Editor, select **Clear tab order**.



[Learn more ...](#)

- From the Dashboard Editor toolbar, select the **Clear All Tab Index Values** icon .

[Learn more ...](#)

• Foreign Key Improvements

- Foreign keys are now automatically updated when you publish a Blueprint that contains changes made to foreign key settings for validated fields. Options to manually update foreign keys have been removed from the Blueprint Publish dialog and the Globalization page in CSM Administrator.
- Indexes for foreign key fields now reference a special internal validation sub-field that is created automatically. This is an internal reference only, however. On the Business Object Database Properties page in CSM Administrator, the index is shown for the main foreign key field.
- Validation checks to help you determine if shared foreign key fields are correctly configured. You will now receive validation warnings when you edit an incorrectly configured field in a Blueprint. [Steps are provided](#) to help you resolve these warnings.

[Learn more ...](#)

Globalization Improvements

Several improvements have been made to globalization features that enable you to translate text, referred to as "strings," into one or more languages and ensure that Users can use a single CSM installation to view the same data in multiple languages.

• Language Pack Distribution

You can now distribute translated strings to various target systems by adding Language Packs to a Blueprint or mApp Solution. After the Blueprint or mApp Solution is published, apply the included Language Packs to your target system.

- **Options for Scanning Cultures During a Blueprint Publish**

You can now choose to scan all cultures, enabled cultures, or the currently selected culture when a Blueprint is published.

- **Apply Language Packs to Form Controls**

Added the ability to apply Language Packs to one or more controls on the Form Editor.

- **Tab Order by Culture**

Tab order on Forms can now be set for each culture.

- **Locking Strings from Translation**

You can now create lists of locked strings to prevent certain strings from being translated when a Language Pack is applied.

- **Simplified Blueprint Options**

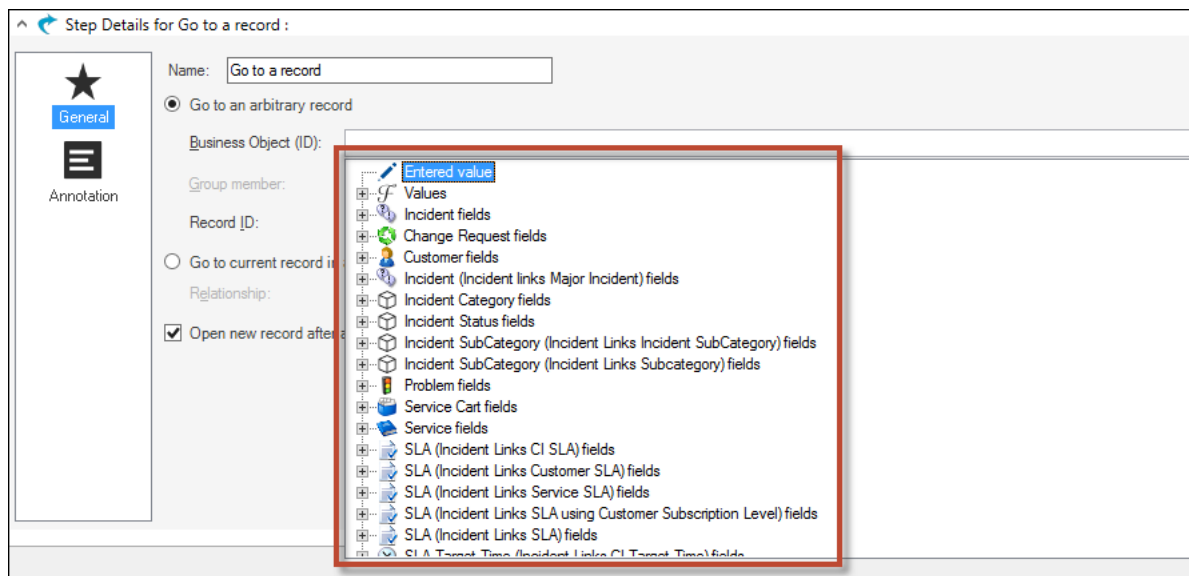
Options to save or publish a Blueprint when a Language Pack is applied have been removed. Now, a Blueprint is automatically created and opened when you apply a Language Pack. You can choose to modify, save, or publish the Blueprint as needed.

[Learn more ...](#)

Miscellaneous Improvements

- **Use a Token for One-Step Actions: Go to a Record Action**

You can now use a Token for a Business Object in the Go to a Record Action in One-Step Actions. This allows a single sequence of Actions to be run on a variety of Business Objects. Open the Token Selector to select a Token that holds the record ID of the Business Object.



[Learn more ...](#)

- **User/Customer Data Expressions Extended**

- Ideation Station Feature*

- User/Customer Data Expressions have been extended to support all fields in the UserInfo or Customer table. You can now build Expressions that return fields from those tables. If User is selected, the list of available fields is from the UserInfo table. If Customer is selected, the list of available fields is from the Customer table.

Expression

Name:

Description:

Editor:

User Data

Type of User

User Customer Current User/Customer

Attribute name:

User record ID:

Avatar
 Department
 E-mail address
 Full name
 IsLoggedIn
 LastLoginDateTime
 LastLogoutDateTime
 Manager ID
 Manager name
 Phone number
 Address
 Availability
 CellPhone
 City
 Comments
 CreatedBy
 CreatedByID
 CreatedCulture
 CreatedDateTime
 DefaultTeamName
 DefaultTeamID
 Email
 EmployeeID
 EndDate
 FaxNumber
 FirstName
 FullName
 HomePhone
 Image

OK Cancel

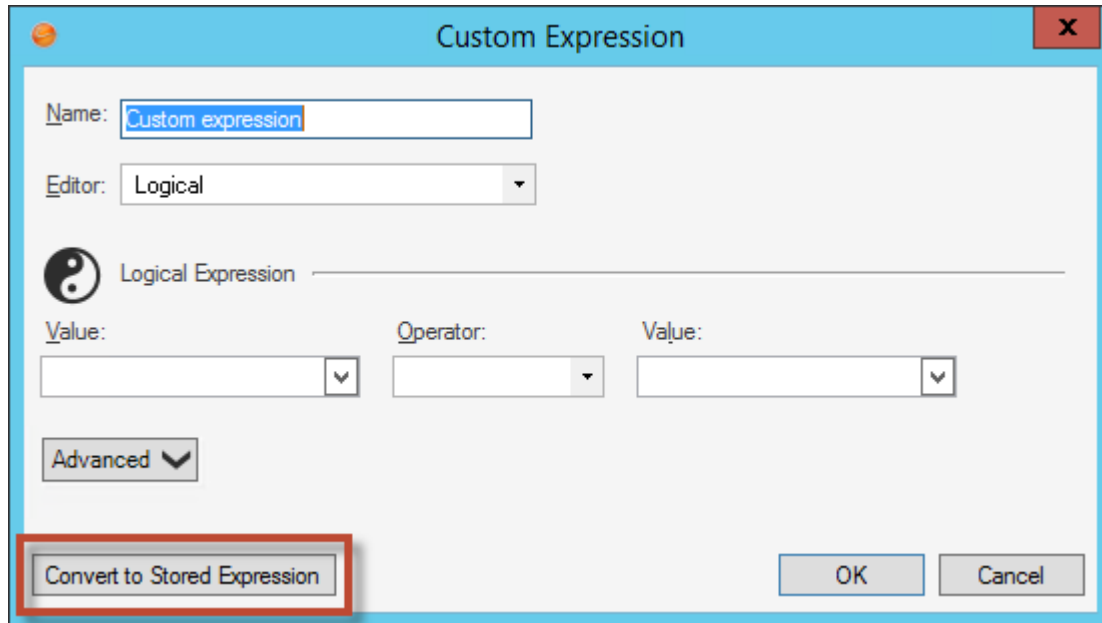
[Learn more ...](#)

- **Save a Custom Expression as a Stored Expression**

Custom Expressions, which can be created at various places in CSM, can now be saved as Stored Expressions using the **Convert to Stored Expression** button in the Custom Expression dialog box.

While Custom Expressions can be used only where they are created, Stored Expressions can be accessed and used in many places throughout the application.

Ideation Station Feature



[Learn more ...](#)

- **Support for Excel .xlsx and .xltx File Extensions**

Ideation Station Feature

The Excel Merge Action for One-Step Actions now support the following file extensions: .xlsx and .xltx.

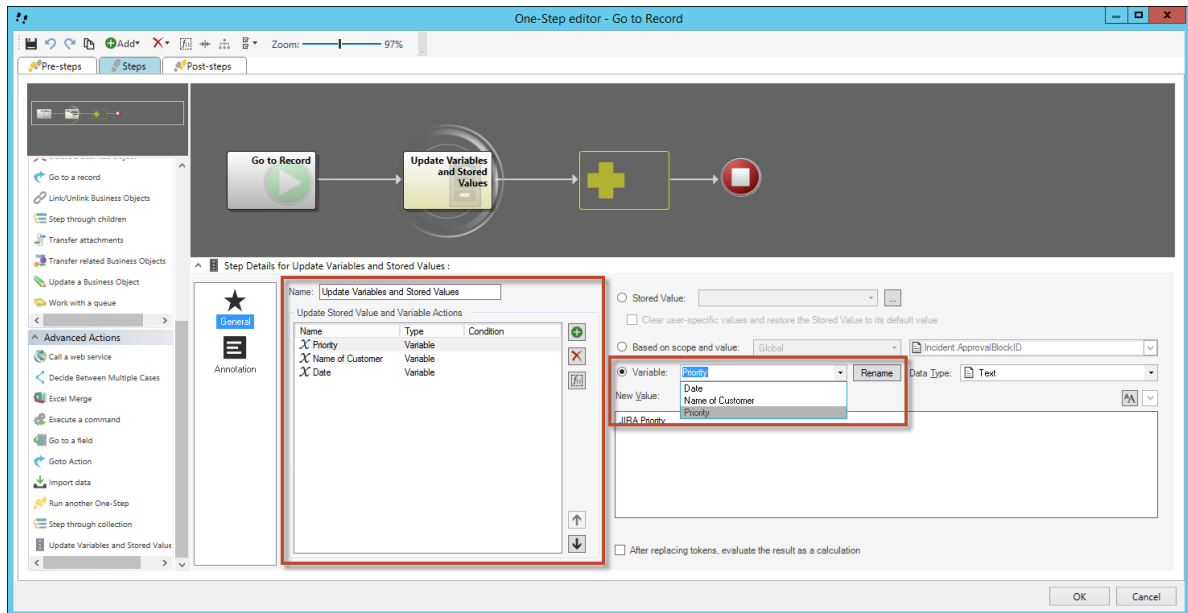
[Learn more ...](#)

- **Improvements to Update Variables or Stored Values Action for a One-Step Action**

Ideation Station Feature

Ideation Station Feature

You can now set or update multiple variables and Stored Values within a single Update Variables and Stored Values Action. When renaming a variable, all the references are moved to the new name instead of creating a new variable. When editing the Update a Variable or Stored Values Action, the list for multiple variables is now sorted alphabetically. Any variables that are not referenced when the One-Step Action is closed are removed.



[Learn more ...](#)

- **Redesigned Dashboard Grids**
Grids in Dashboards have been redesigned to improve usability.

All Problems

Probl...	Title	Priority	Status	Owned By
10166	Upstairs printer is broken	2	Work in Progress	Josh Wilson
10167	Spam Working Too Well	2	Work in Progress	Andrew Simms
10172	Printer not printing	1	Work in Progress	Andrew Simms
10218	Error message on our Point of Sale (POS) software	3	Pending Change	Gina Mehra
10219	Can't access the X drive	2	Pending Change	Henri Bryce

[Learn more ...](#)

- **Expression for Default Prompt Value**
Ideation Station Feature

Default Prompt values can now use an Expression by selecting the Expression option in the Define Prompt dialog box.

[Learn more ...](#)

System Support Changes



- TCP Configurations No Longer Supported by CSM**
 If your TCP Client, service, or Trusted Agent connections are configured to use TCP, they will be converted to HTTPS during the upgrade to CSM 9.6.0. You will see a new connection in the Connection Window.
- Application Server as a Windows Service No Longer Supported**
 You can no longer install the Application Server as a Windows Service. New installations of CSM will install the Application Server as a web application under IIS.

Overview of New OOTB Content for CSM 9.6.0

Form Redesign

This release includes a new look for CSM forms. The new layout is designed to improve usability while maintaining a similar workflow.

The redesign introduces the following new icons:

-  Related Item Picker: Exists in certain fields to open the Related Items dialog box that includes a list of appropriate items to complete the field. (Example: Customer field opens the Related Items dialog box that includes a list of customers.)
-  Quick View: Exists in certain fields to open the record related to the selected item.

Each redesigned form includes the following four main areas:

1. Default Form: Displays record ID number, status, and Created By information.
2. Form Arrangement: Dynamically displays linked records (Child Records) that are in a relationship with the parent record.
3. Form Area: Displays the form fields for the tab selected in the Form Arrangement. The Overview tab contains most of the information needed to perform the workflow for the Business Object you are viewing.
4. Actions List: Dynamically displays a list of actions that are available for the current record.

These new sections are highlighted in the following image of an Incident form:

P4 INCIDENT 102362 Desktop Management > Computer > Submit Incident Created by Cherwell Admin on 3/20/2019 at 9:44 AM

STATUS: New RESPOND WITHIN: 01 hour 57 minutes RESOLVE WITHIN: 6 days 23 hours CUSTOMER: Tracy E Aubin (Tracy.Aubin@RiverTCorp.com) ASSIGNED TO: Henri Bryce (1st Level Support)

Next: [Begin Work](#)

Overview | Activity | Journals | Task (0) | Similar Incidents (10) | Related Cls (1) | Related Problem

1 (Header area)

2 (Navigation tabs)

3 **Additional Questions**
No additional information for this request.

4 **Actions**

- [Assign to Me](#)
- [Escalate to Level 2](#)
- [Link to Existing Major Incident](#)
- [Submit to Knowledge Base](#)
- [Change to Major Incident](#)
- [View Impacted Cls](#)
- [Select Available SCT](#)

Call Source: Phone

Customer*: Tracy E Aubin

Description*: C/S PC is too slow.

Service Classification*: Submit Incident (Selected: Desktop Management > Computer > Submit Incident)

Priority*: 4 = Individual + Medium

Primary Configuration Item: tracy-desk

Assigned Team: 1st Level Support

Assigned To: Henri Bryce

Buttons: Cancel, Save

[Learn more ...](#)

Incident Form Redesign

As seen in the previous image, the Incident Form has a new look. In addition to the layout that all redesigned forms share, the Incident form now allows you to choose a Service Classification from a table accessed through the Service Classification field instead of selecting Class, Category, and Subcategory from separate menus. The following image shows the new Incident Form layout.

INCIDENT 102365 Created by Henri Bryce on 7/24/2019 at 1:52 PM

STATUS: New
Next: [Begin Work](#)

RESPOND WITHIN: --
RESOLVE WITHIN: --

CUSTOMER: --
ASSIGNED TO: --

Overview | Activity | Journals | Task (0) | Related CIs (0) | Related Problem

Call Source: Phone

Customer *

Description *

Service Classification *

Priority * = Impact + Urgency

Primary Configuration Item

Assigned Team

Assigned To

Additional Questions
No additional information for this request.

Actions
[Assign to Me](#)
[Escalate to Level 2](#)
[Link to Existing Major Incident](#)
[Submit to Knowledge Base](#)
 Change to Major Incident
 View Impacted CIs
 Select Available SCT

Cancel Save

[Learn more ...](#)

Change Management Form Redesign

The Change Management form has been redesigned for CSM 9.6.0. In addition to the interface upgrade, the Change forms have new functionality for the Priority matrix. Instead of selecting a priority that determines what values populate the Impact and Urgency fields, you now select the scope of the impact and the level of urgency and the Change form calculates the priority level. The following image shows a new Change form as it appears in the CSM Browser Client:

CHANGE 10946 (Standard) Created by QA Test on 3/26/2019 at 8:36 AM

STATUS: Classify
Next: Implement

PROPOSED START DATE: --
PROPOSED END DATE: --
RISK ASSESSMENT: None
REQUESTED BY: QA Test
ASSIGNED TO:

1 of 1: **Classify and Implement** Journals Task (0) Problem (0) Incidents (0) Configuration Items (0)

Classify

Requestor *
QA Test

Change Type
Standard

Primary Configuration Item

Assigned Team

Assigned To

Impact + Urgency = Priority

Title

Description *

Impacted Service

Service Importance

Schedule

Proposed Start Date: M/d/yyyy
Proposed End Date: M/d/yyyy

Implement

Standard Change Template

Standard Change Approved Items

Actions

- [Assign to Me](#)
- [Email Change Review](#)
- [Create New Task](#)
- [View Change Calendar](#)
- [View Collision Detection](#)

Cancel Save

[Learn more ...](#)

Problem Form Redesign

The newly-redesigned Problem form also uses the Service Classification field instead of selecting Class, Category, and Subcategory from separate menus. The following image shows the Problem form.

Save Cancel Refresh Delete Attach (0) Knowledge Record 1 of 1 Not queued Current Record List Grid

--

PROBLEM 10228

STATUS: New
Next: Begin Work

RESOLVE WITHIN: --

SOLUTION TYPE: No Solution

ASSIGNED TO:

Created by Henri Bryce on 5/16/2019 at 10:58 AM

Overview | Journals | Tasks (0) | Configuration Items (0) | Incidents (0) | Change Request

Identification

Title *

Description *

Service Classification

Primary Configuration Item

Assigned Team Assigned To

Priority * Impact Urgency

= +

Resolve By

Actions

- [Assign to Me](#)
- [Set to Pending Change](#)
- Notify Impacted Customers of Update
- View Impacted Configuration Items
- [Generate Root Cause Analysis Tasks](#)
- Resolve Linked Incidents
- Create Knowledge Article
- [Publish to Top Issues in Customer Portal](#)
- Publish Workaround to Customer Portal
- Publish Known Error to Customer Portal

Analysis

Symptoms and Probable Causes

Assigned Team to do Root Cause Analysis

Root Cause

Cause Category

Workaround

[Learn more ...](#)

Knowledge Article Form Redesign

The Knowledge Article Form has been redesigned for CSM 9.6.0. With the same new layout as other CSM forms, it is designed to improved usability. The fields have been rearranged to create a better workflow. The redesigned KA Form is shown below.

KNOWLEDGE 10384 Created by Gina Mehra on 5/30/2019 at 10:41 AM

STATUS	PUBLISH DATE	REVIEW DATE	ASSIGNED TO
New	--	--	

[Next: Submit New Article](#)

Overview Journals Comments Problem

Article Type *

Service *

Category

Subcategory

Configuration Item Type

Assigned Team

Assigned To

Title *

Content *

Article Stats

- 0 Likes
- 0 Dislikes
- 0 Usage overall
- 0 Used in Portal

Actions

- [Assign to Me](#)
- [Add Comment](#)
- [Update/Revise Article](#)

[Learn more ...](#)

Service Catalog Template Form Redesign

The redesigned Service Catalog Template also allows you to choose Service Classification from a table accessed through the Service Classification field instead of selecting Class, Category, and Subcategory from separate menus. The following image shows the updated SCT form.

Save Cancel Refresh Delete Knowledge
Record 1 of 1
Current Record List Grid

SERVICE CATALOG TEMPLATE 49

Created by Henri Bryce on 5/16/2019 at 11:35 AM
Last modified by on 1/1/0001 at 12:00 AM

STATUS	CUMULATIVE COST	CRITICAL PATH	BUSINESS OWNER	IT PROCESS OWNER
New	\$0.00	--	-Select Owner-	Henri Bryce
Next: Active			- An email on report -	3rd Level Support

Title *

Portal Title *

Description *

Portal Description *

Service Classification *

Critical Path Time Units
Minutes

Service Catalog Template Category

Resolution Business Hours

Work Unit Functions

[Add a Work Unit](#)

[Learn more ...](#)

Agreement Form Redesign

Operational Level Agreement (OLA) and Underpinning Contract forms have been redesigned for CSM 9.6.0. In addition to streamlining the workflow, the Cost and Performance information is now part of the Overview form. The redesigned OLA is shown below.

Save Cancel Refresh Delete Unlocked Attach (0) Knowledge Record 3 of 7 Current Record List Grid

OLA Created by Henri Bryce on 11/28/2018 at 1:04 PM
Last modified by Clair Wu on 3/30/2019 at 6:49 AM

Drive Replacement > Drive Replacement

STATUS Active <small>Next: Retire</small>	REVIEW DATE 2019-01-28	SUPPLIER Hardware Support <small>hardware_support@RiverTCorp.com</small>	ASSIGNED TO Gina Mehra IT Management
---	---------------------------	--	--

Overview Supplier Journals

Details

Name *

Supplier *

Supplier Catalog Item Type *

Supplier Catalog Item *

Description

Start Date End Date

Review Date

Scope

Assigned Team Assigned To

Terms

Rules for Changes

Rules for Termination

Availability

Service Availability

Service Uptime %

Service Availability Exception(s)

Actions

[Assign to Me](#)

[Deactivate](#)

Cost and Performance

Resolution Time

Resolution Units

Resolution Business Hours

Associated Cost

SKU Number

Cancel Save

[Learn more ...](#)

Building and Site Form Redesign

Building and Site Forms have been updated for CSM 9.6.0. Some fields have been rearranged to create a better workflow. The redesigned Building form is shown below.

The screenshot shows a web interface for creating a new building record. At the top, there is a navigation bar with icons for Save, Cancel, Refresh, Delete, Knowledge, and navigation arrows. The page title is "NEW BUILDING" and it indicates "Record 1 of 1" and "Current Record". A status bar at the top right shows "Created by Henri Bryce on 5/16/2019 at 11:27 AM". Below the title bar, there is a "STATUS" section with "New" and "Next: Active" options, and an "ASSIGNED TO" section with "-select owner-" and "-select team-" options. The main form area is titled "Overview" and contains the following fields: "Site *" (dropdown), "Building Name *" (text), "Address" (text), "Address 2" (text), "Country" (dropdown), "State/Province/Territory" (dropdown), "City" (text), "Postal Code" (text), "Region Code" (dropdown), "Full Address" (text), and "Notes" (text area). To the right of the form is an "Actions" section with an "Assign to Me" button. At the bottom of the form are "Cancel" and "Save" buttons.

[Learn more ...](#)

Journals Redesign

Journals, which track what occurs during the record's lifecycle, are listed on the Journals tab in the Form Arrangement section of each of the forms. The layout of the Journals tab has been redesigned as shown in the following image.

P3 INCIDENT 102235
Desktop Management > Anti-Virus > Submit Incident

Created by Henri Bryce on 3/13/2019 at 2:51 PM
Last modified by Clair Wu on 3/23/2019 at 7:19 AM

STATUS: In Progress (Next: Resolve) | RESPONSE BREACHED: 3/13/2019 2:51 PM | RESOLUTION BREACHED: (3/18/2019 2:51 PM) | CUSTOMER: Susan Malach (Susan.Malach@RiverTCorp.com) | ASSIGNED TO: Andrew Simms (1st Level Support)

Overview | Activity | **Journals** | Task (0) | Customer History (1) | Similar Incidents (1) | Related CIs (1) | Susan's Open Incidents (1) | Related Problem

Type	Created	By	Details
Journal - History	4/2/2019 7:14 PM	Clair Wu	The value in the field SLA Resolution Warning was s
Journal - History	4/2/2019 7:14 PM	Clair Wu	The value in the field Service Customer is Entitled w
Journal - History	4/2/2019 7:14 PM	Clair Wu	The value in the field Linked SLAs was set from the
Journal - History	4/2/2019 7:14 PM	Clair Wu	The value in the field SLA ID for Customer was set b
Journal - History	4/2/2019 7:14 PM	Clair Wu	The value in the field Customer Display Name was s
Journal - History	4/2/2019 7:14 PM	Clair Wu	The value in the field SLA Resolve By Deadline was :
Journal - History	4/2/2019 7:14 PM	Clair Wu	The value in the field SLA Name was set from the va
Journal - History	3/23/2019 7:19 AM	Clair Wu	The value in the field Owned By Team was set from
Journal - History	3/23/2019 7:19 AM	Clair Wu	The value in the field Priority was set from the val
Journal - History	3/23/2019 7:19 AM	Clair Wu	The value in the field Urgency was set from the val
Journal - History	3/23/2019 7:19 AM	Clair Wu	The value in the field impact was set from the val
Journal - History	3/23/2019 7:19 AM	Clair Wu	The value in the field Subcategory was set from the
Journal - History	3/23/2019 7:19 AM	Clair Wu	The value in the field Category was set from the val

Journal - History
Created by Clair Wu on 4/2/2019 at 7:14 PM

Details
The value in the field Service Customer is Entitled was set to the value False on 12/16/2018 by clair.

Configuration Items Redesign

The Configuration Item forms have been redesigned for CSM 9.6.0:

- Computer
- Mobile Device
- Network
- Other CI
- Printer
- Server
- Software License
- System
- Telephony

The updated design for the Configuration Item - Computer form can be seen in the following image:

Save Cancel Refresh Delete Attach (0) Knowledge Record 1 of 1 Current Record List Grid

COMPUTER 4470 Created by QA Test on 3/26/2019 at 9:50 AM

STATUS PRIMARY USER ASSIGNED TO
 New Next: Order

Overview
CI Events (0)
Baseline Changes
Journals
CI Users
Incidents (0)
Problems (0)
Upstream CIs (0)
Downstream CIs (0)
Change Requests (0)

Details

Friendly Name *

Asset Tag
 +

Barcode

Computer Type

Primary Use

Manufacturer

Model

Serial Number

Primary User

Assigned Team Assigned To

Site

Building Location ID

Address City

State/Province Postal Code

Financial

Supplier

Invoice ID

Purchase Date

Purchase Price

Purchase Type

Properties / Network

Operating System

Operating System Family

Operating System Service Pack

Operating System Version

BIOS Version

CPU Type

Number of CPUs CPU Speed

Memory Virtual Memory

Video Card

MAC

Host Name

User Name

IPv4 Address

IPv6 Address

Alternate IP Address

Actions

[Assign to Me](#)

[Create a New...](#)

[View the CI/Network Map](#)

[Activate](#)

[View More Status Options](#)

Cancel Save

[Learn more ...](#)

Customer - Internal Form Redesign

The Customer - Internal form has been redesigned for improved user experience. You can select the avatar to the left of the Employee header and choose a photo for the employee. Also, the following new fields have been added to the Customer - Internal form to record more specific information:

- **Location ID:** Identifies a specific location within the selected Site Name and Building. (example: employee's workstation number, office number, or other general location.)
- **Type:** Identifies the phone number provided in the Primary Phone and Secondary Phone fields as Home, Work, or Mobile.

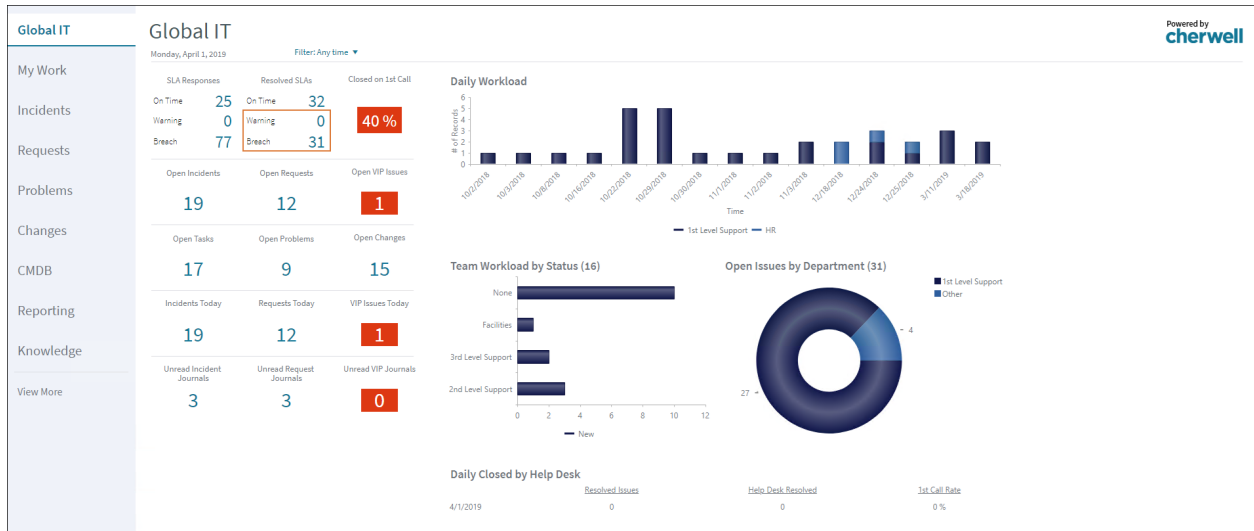
The following image shows the redesigned Customer - Internal form.

The screenshot displays the 'EMPLOYEE' form interface. At the top, there is a navigation bar with icons for Save, Cancel, Refresh, Delete, Knowledge, and navigation arrows. The main header shows 'EMPLOYEE' with a profile icon and a 'CONTACT' tab. Below the header, there are tabs for 'Overview', 'Incidents (0)', 'Assets (0)', 'Services (0)', and 'Journals'. The form is divided into three main sections: 'General', 'Contact', and 'Organization'. The 'General' section includes fields for First Name, Middle, Last Name, Employee Type, and SLA Subscription Level. The 'Contact' section includes Primary and Secondary Phone fields with Type dropdowns, E-Mail, and Secondary E-mail. The 'Organization' section includes Department, Title, Manager, and Notes. A 'Create an Incident' link is visible in the Action area. The bottom of the form has 'Cancel' and 'Save' buttons.

[Learn more ...](#)

Dashboard Redesign

OOTB Dashboards have been redesigned. The new Dashboards have a consistent look and feel that is similar to the Forms redesign.



Activity Pane

In OOTB content, the Incident Business Object has the Activity Pane activated, and the Activity Pane fields are mapped to fields in several Journal Supporting Objects.

P3

INCIDENT 102256

Printing > Network > Submit Incident

STATUS	RESPONSE BREACHED	RESOLUTION BREACHED	CUSTOMER
Reopened Next: Begin Work	3/18/2019 3:31 PM	3/18/2019 3:33 PM	Josh Wil Josh.Wils

Overview
Activity
Journals
Task (0)
Customer History (1)
Similar Incidents (3)
Related CIs (0)

Create Note

All
Internal Notes
External Communications
System Audits
Pinned

Newest to Oldest ▼

Audit

Clair Wu

3/31/2019 7:14:04 PM

The value in the field Requester Department was set from the value IT to the value IT on 12/16/2018 by clair.

Audit

Clair Wu

3/31/2019 7:14:04 PM

The value in the field SLA Name for Customer was set from the value Gold to the value Gold on 12/16/2018 by clair.



Note: This is not an exhaustive list of all forms updated in CSM 9.6.0.