cherwell®

Acquired by Ivanti

What's New in CSM 9.7.0?

Legal Notices

The Cherwell Software product suite includes:

- Cherwell Service Management
- Cherwell Asset Management

Contact Cherwell Software

Contents

Overview of What's New in CSM 9.7.0

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.

Multiple Record Selection in Search Results Grids

Ideation Station Feature

After running a search query in either the CSM Desktop Client or the CSM Browser Client and viewing the results as a Grid, Administrators can now select multiple records and export them to a file or run a One-Step™ Action on the selection.

In the Browser Client, you can export a selection of records either to a .csv or an .xlsx (Excel) file directly from the Grid menu bar. In the Desktop Client, you can open the **File** menu and export multiple records to various formats, including .csv, .xlsx, .xml, and more.

Learn more...

When running a One-Step Action on multiple records, a pop-up window displays the Business Object publicID of each record as it is processed by the Action. If you cancel the One-Step Action before it completes, the Action processes the current record and then terminates. After the One-Step Action completes, you may need to refresh the screen to see the updates in the Grid.

Learn more...

Note the following new options and behaviors in Search Results Grids:

- In the Browser Client, the **Actions** menu is disabled when more than one record is selected.
- A new **Selected** option is available in both CSM clients to provide a total count of records that are currently selected in the Grid.
- A new **Clear** option is available in both CSM clients to let you clear the current selection of records.
- A check box in the column header allows you to select all records. If you have configured pagination (Browser Client only), only the items on the current page are selected.
- After selecting multiple records in a Search Results Grid, the selection is automatically cleared when records are sorted or filtered and also when a new column is added to the Grid.

Figure 1. Search Results Grid in Browser Client

Figure 2. Search Results Grid in Desktop Client

Call One-Step Actions from the Cherwell REST API

Ideation Station Feature

CSM now offers the ability to identify and execute available One-Step™ Actions using the REST API. This new functionality includes endpoints that will return a list of One-Step Actions based on Association, Scope, Scope Owner, or Folder. Other endpoints allow you to execute a One-Step Action for a Business Object record, as a stand-alone One-Step Action, or by providing information to satisfy prompts.

Learn more...

Action Catalog Improvements

- **Configure Cards with Search for Action Catalog Widgets**
Administrators can now configure the details that show on a card to help provide better descriptions for customers. Selecting the **Style** Cards with Search gives you access to a new check box **Alway show items as cards**. Selecting this check box means you can add extra text fields for **Subtitle**, **Rating** and **Footer**.

Learn more ...

- **Add Sorts and Filters to an Action Catalog**
  Ideation Station Feature

Administrators can now add sorts and filters to an Action Catalog Widget to make accessing data easier for users of Portal Sites. Use the Actions page (accessed from within the Action Catalog Widget Properties window) to add a filter that uses a saved search.

Note: Sorts and filters, as described here, can only be added when the Style on the Widget Display page is set to **Cards with Search**.
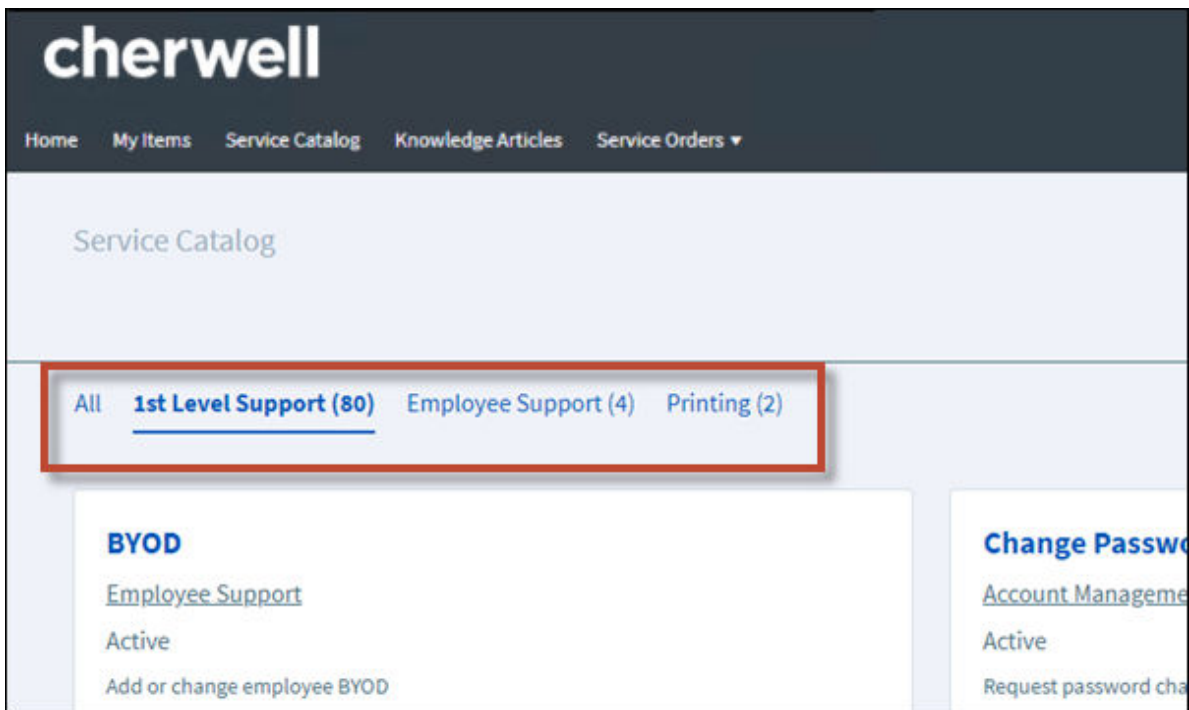
Sorts are added using the same Actions page. When more that one sort has been added, they appear on the top right hand side of theCustomer Portal and an arrow shows direction of sorting.
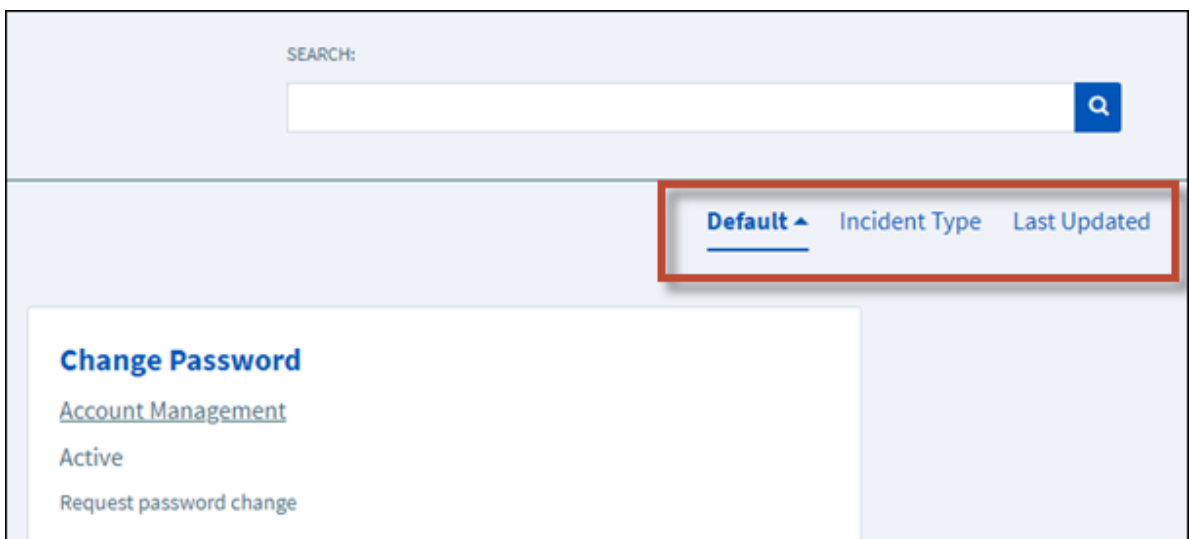
Learn more...

Form Improvements

- **Clone a Form**
  Ideation Station Feature

  As an administrator, you can now save time by cloning a Form from an existing Form. After cloning a Form, you can add, remove, and move fields and controls in the same way as when adding a Form.

  Note: You can clone a Form within the same Business Object only. For example, you can clone an Incident Form to create another Incident Form but you cannot clone an Incident Form to create a Problem Form.
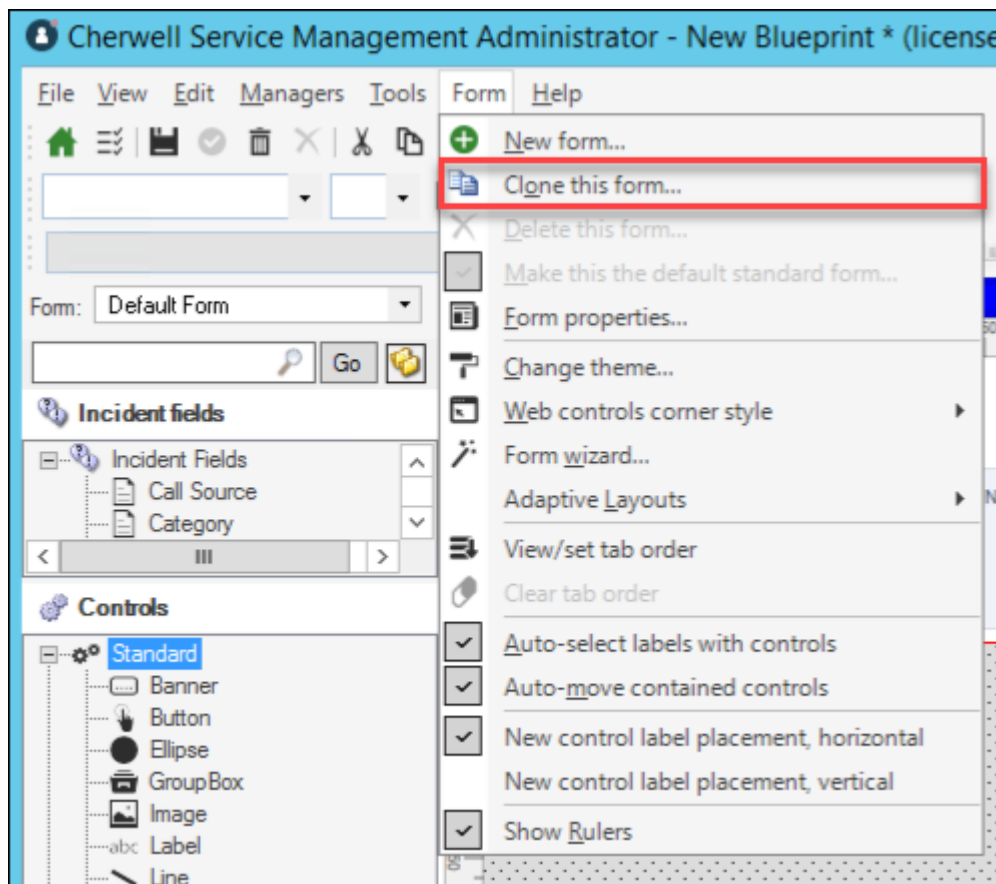
  Learn more...

- **Asterisks for Required Fields**
  You can now choose to display an asterisk next to required Form field label controls marked **Always Required for Save** in a Business Object. This option is enabled by default on new Business Objects.

Fields that are conditionally required for save will display the asterisk if the condition is met when the form loads, or a change to the form triggers a condition to be re-evaluated.

Learn more...

- **Web Control Corner Style**
Ideation Station Feature

You can now customize the corner appearance of Form controls on the Customer Portal and CSM Browser Client. You can choose either a new rounded style or the traditional right-angled style. You can choose this preference globally in the Display Settings section (within System Settings) of the CSM Administrator, or you can enable it for individual forms via the Web Control Corners Style

menu in the Form menu bar on the Form Editor. You can choose from system default (the option set in System Settings), rounded, or right-angled corners.

This feature makes subtle changes to how most Form control corners appear within the Customer Portal and CSM Browser Client. It does not affect the appearance of controls in the Administrator or Desktop Client.

Note: This feature should not be confused with the Rounded Corners control property that can be separately enabled only for Rectangle, Tabbed Group Box, and Group Box Controls, which produces a more pronounced rounded corner effect for those controls only (and is also visible in the Administrator and Desktop clients).
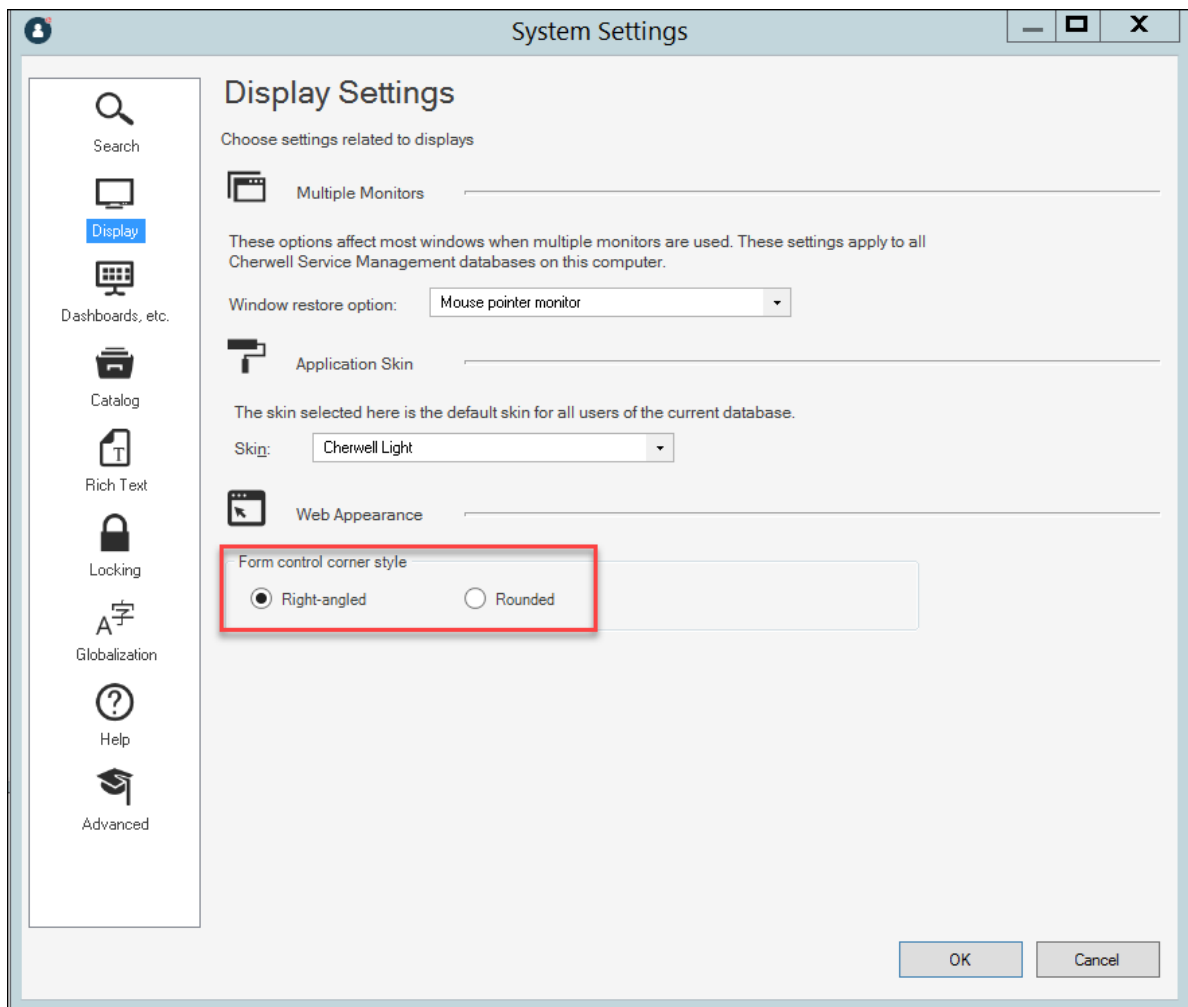
Learn more...

Learn more...

Record Limit Changes

- **Changes for Grids in the Desktop Client**

  All Grids in the Desktop Client, except those in Form Arrangements, now include all rows of data available when you Print or Export to CSV. These Grids display only the first 20,000 rows of data even if there is more data available. You can now export .xlsx (Excel) files from Grids in the Desktop Client, but these exports reflect the displayed Grid and are limited to the first 20,000 rows of data.

- **Record Limit Removed for API**
  An improvement to the API removes the limits on exporting search results. In previous releases, exported search results were limited to 100,000 rows of data. Now, search results and exports will allow multiple pages of records with each page being limited to a maximum of 100,000 rows of data. Also, version two of the Get Results of a Saved Search operation will return all rows of data.

  Learn more...

Web Applications Improvements

- **Show/Hide Toolbars in Portal Sites**
  Administrators can now show/hide toolbars for Portal Sites. If you hide the toolbars, your users can only use the buttons and links that are shown on the screen to work with the records in the Portal Site.
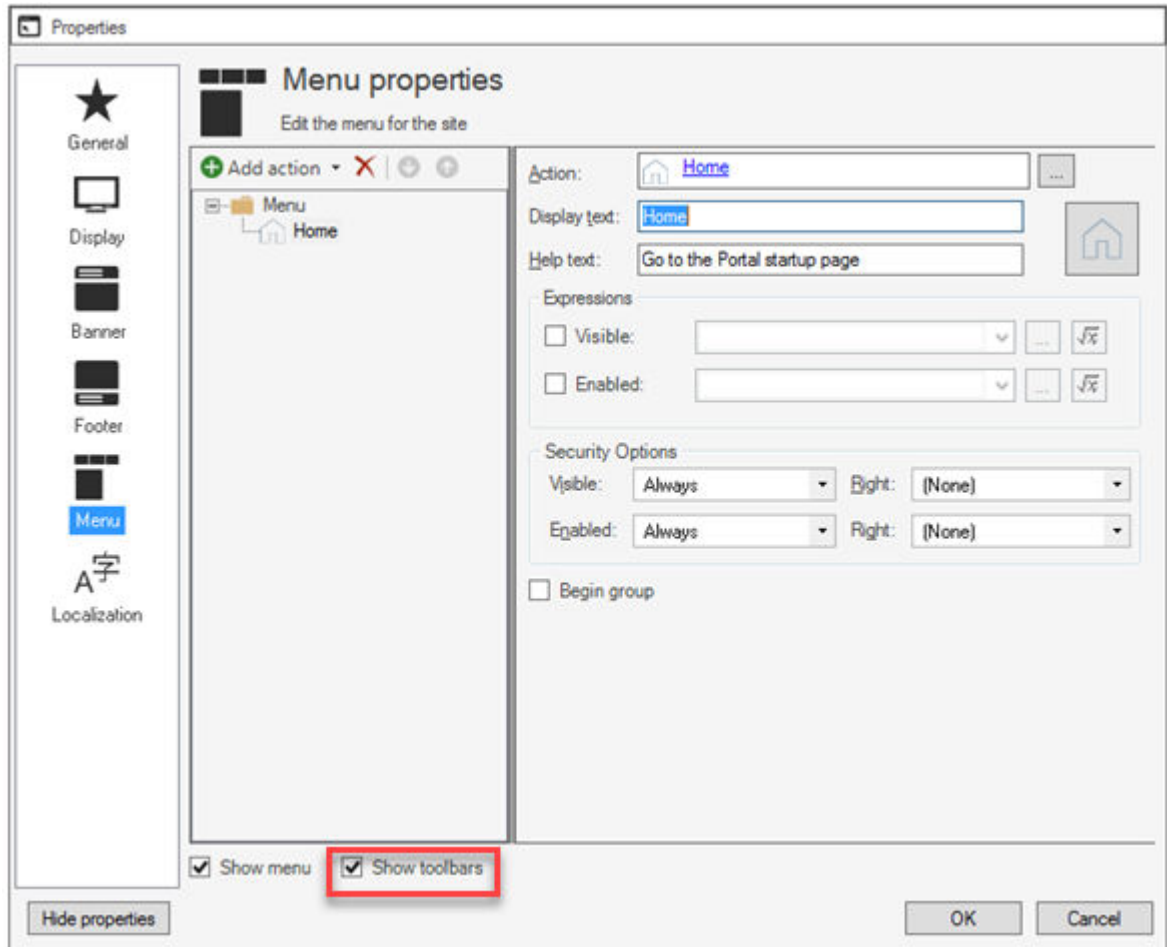
Learn more...

- **Searching in Managers in CSM Browser Client**

  You can now search for CSM Items in Browser Client Managers.

  Learn more...

- **Grid Items in CSM Web Applications Display on Single Line**

  Ideation Station Feature

  Grid items in the CSM Browser Client and Customer Portal will display on a single line instead of appearing with line breaks and text wrapping.

One-Step Action Improvements

Run a One-Step Action during a Blueprint Publish or mApp Solution Application

Ideation Station Feature

Ideation Station Feature

You now have the option to run a One-Step Action during a Blueprint publish or mApp Solution application. Select to run a One-Step Action before publishing the Blueprint. For a mApp Solution, set the option during the building process and the One-Step Action executes when the Blueprint is applied.

Learn more...

Learn more...

Expanded Field Choices for Go to a Record Action

You can now select any Field and Field Value for the Go to a Record Action. For example, you can use the public ID to find records rather than the record ID. If multiple records contain the specified value, the first record found is returned.
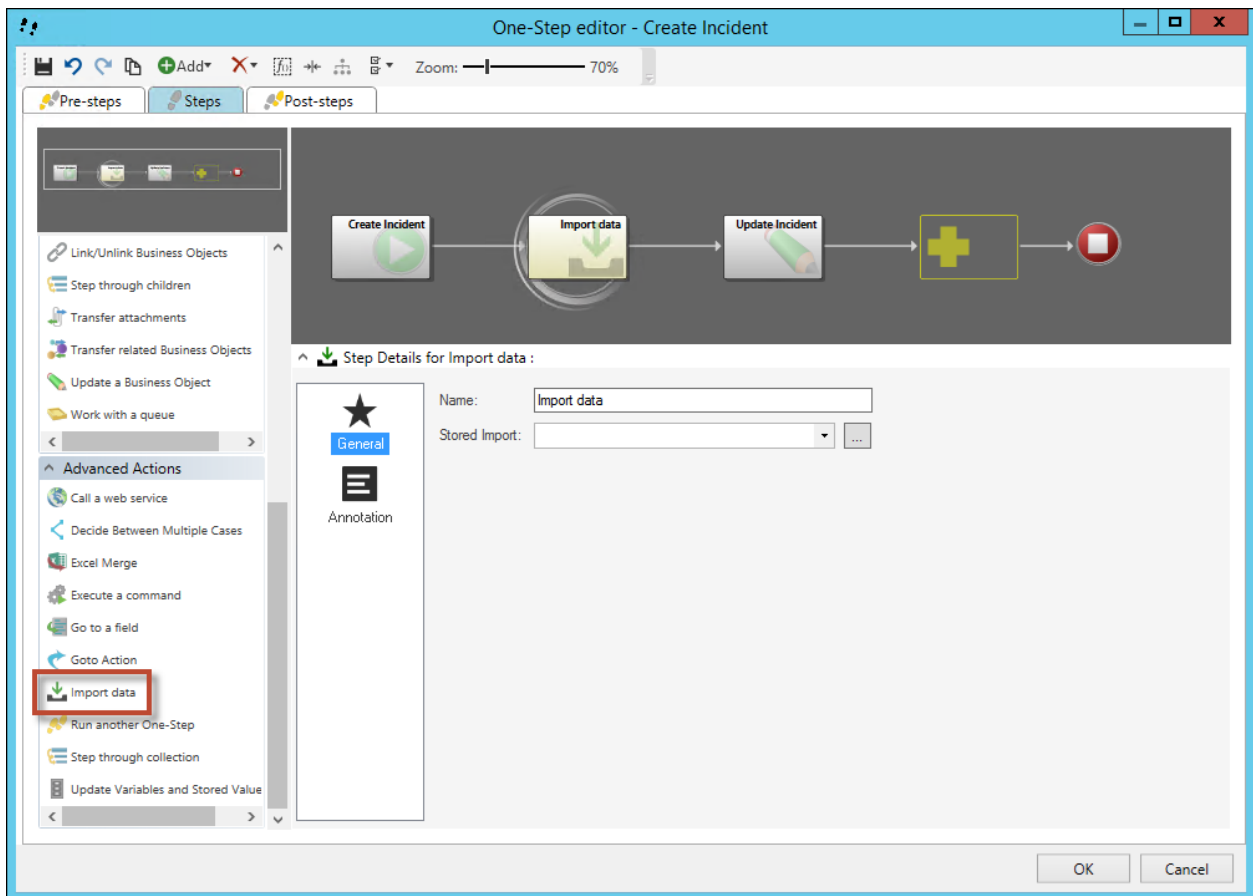
After the upgrade to CSM 9.7.0, existing Go to Record a Actions that go to an arbitrary record will use the record IDs of the Business Object and Field values.

Learn more...

Run a Stored Import from a One-Step Action

Ideation Station Feature

You can now use the Import Data Action to run a stored import (.csv imports) from the Stored Import Manager using a One-Step Action.

Write to Log Action for One-Step Actions

Ideation Station Feature

You can choose the Write to Log Action to create a custom log when a One-Step Action is run. The log includes content defined in the Write to Log Action, along with information based on the log level defined in the Action. The process or client used to run the One-Step Action determines the log location.
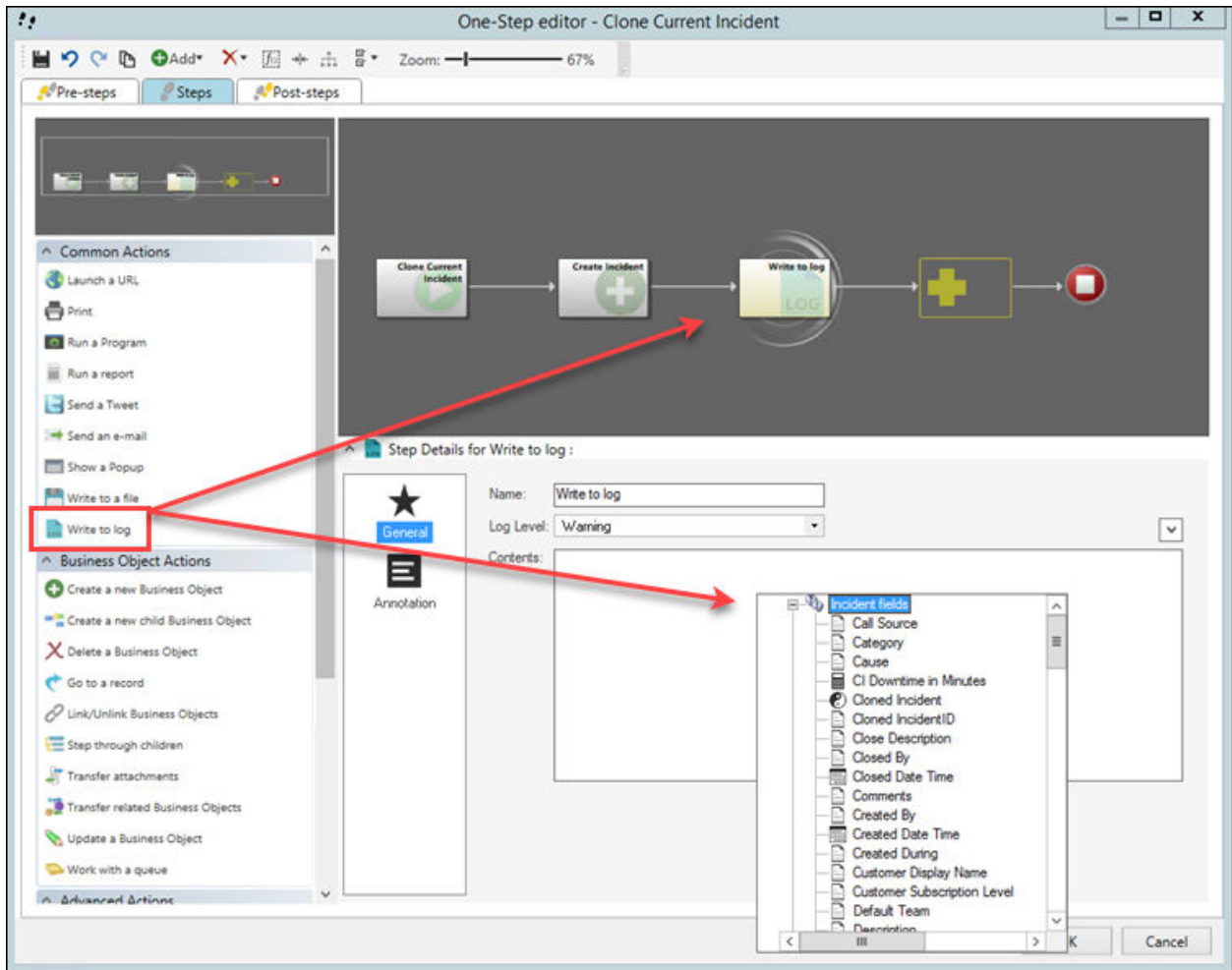
Learn more...

Anonymous Access Improvements

- **Dashboards**
  Dashboards can now be configured individually to allow visibility for Anonymous Users in the Customer Portal. After setting up the initial configuration requirements for Anonymous Access, you can now select the **Allow view access to anonymous users** check box in the Dashboard Properties to enable this feature.

  Note: The configured Startup Dashboard is automatically visible to Anonymous Users regardless of the configured setting.

  If a Dashboard is configured to be visible to Anonymous Users, each control on the Dashboard is also enabled to be visible to Anonymous Users. Anonymous Users have view access only. If an Anonymous User selects a control to execute an action, they are prompted to log in. After successful login, the action runs.

Learn more...

- **Service Catalog**
  The Customer Portal can be configured to allow Anonymous Users to view the Service Catalog without having to log in. After setting up the initial configuration requirements and enabling Anonymous view of the Service Catalog Business Object, you can now enable an Action Catalog Widget for Anonymous access.

  An Action Catalog Widget (OOTB Example: *Service Catalog*) can be used to build a dynamic Service Catalog that is organized by Category and Service, and is capable of executing Actions. Anonymous Users can be enabled to view the Service Catalog through this Widget when they select a link to the Action Catalog from a Dashboard, Menu link, or Button. After setting up some additional

configuration requirements, select the **Allow Anonymous Access to Action Catalog in the Portal** check box in the Widget Properties to enable this feature.

Learn more...

- **ViewAnonymous() System Function**

A new System Function ViewAnonymous() was added to be used as a visibility expression for an item on a Form or Dashboard. It can be set as a Boolean Property wherever a System Function can be accessed (e.g., One-Step Action, Expression, etc.).

Note: If a Form or Dashboard is configured to be visible to Anonymous Users, each control on the Form or Dashboard is also enabled to be visible to Anonymous Users.

Use the ViewAnonymous() System Function to restrict Anonymous User visibility of a specific Form Control or Widget by setting the Value to *false* for that control. If the Value is set to *False*, the control is not visible to Anonymous Users.

Learn more...

Prevent mApp Solution Customization During Installation

The mApp Solution properties window, accessed from within the mApp Editor, is used to define mApp Solution properties. As a mApp author, you can now select the **Prevent mApp customizations during install** check box to remove the **Don't Change** option when a mApp is applied during an upgrade. This means that the mApp is applied in its entirety during an upgrade, lessening the possibility of a mApp failure with customized content.
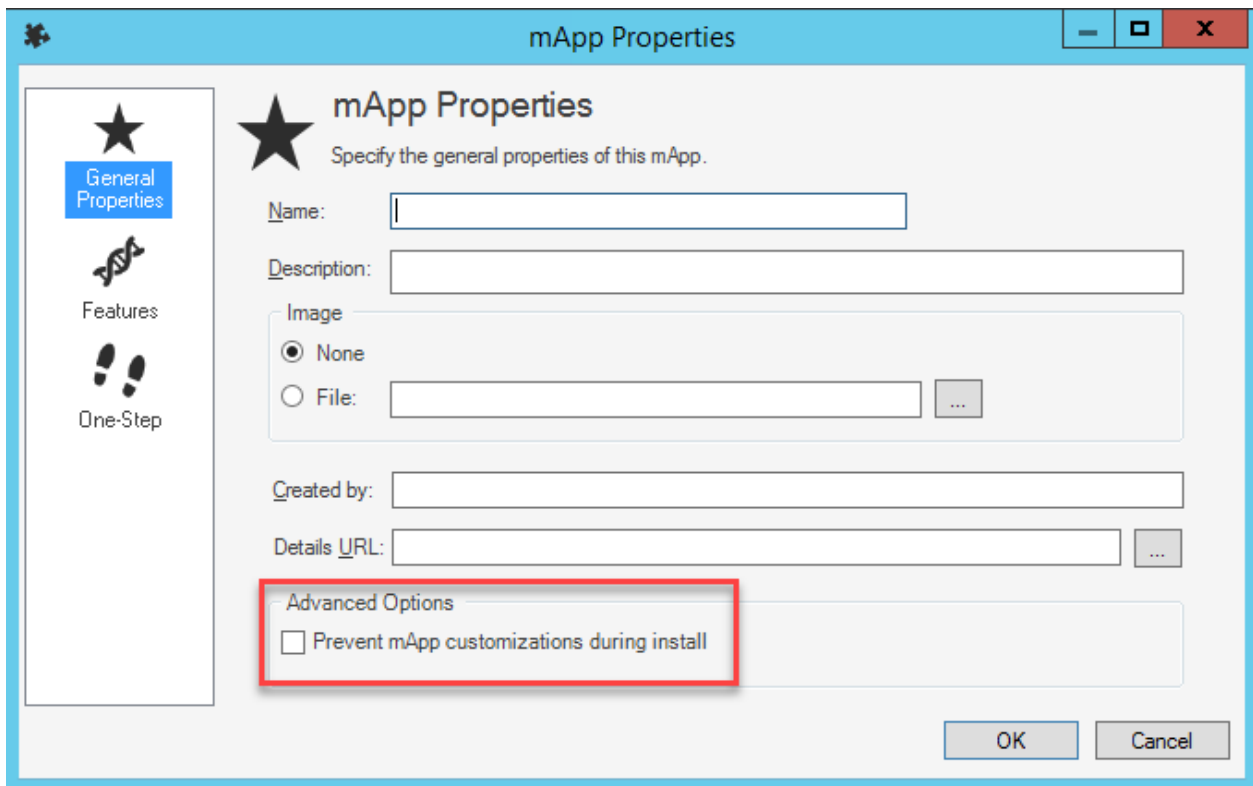
Learn more...

Globalization Improvements

Several improvements have been made to Globalization features that enable you to translate CSM into multiple languages.

- **Globalization "Always On"**
  Globalization is automatically enabled for all CSM systems. You cannot disable Globalization features, but you can hide or remove the culture selector globally or for specific Roles and Users.
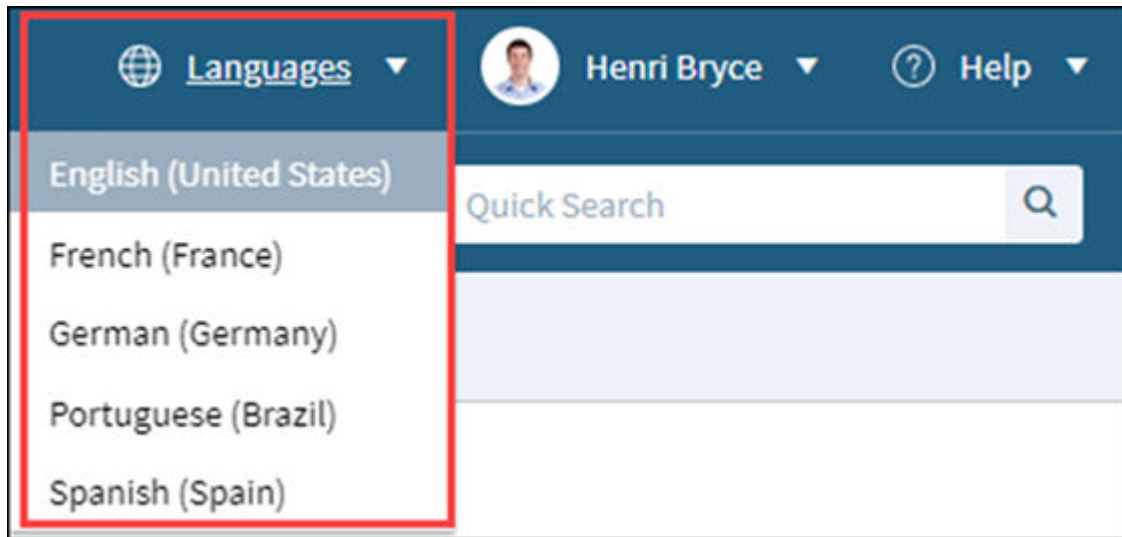
  Learn more...

- **Simplified Culture Selector**
  Ideation Station Feature

  Ideation Station Feature

  The culture selector that enables Users to quickly change display languages in all CSM clients now includes only one choice that controls platform and content strings. The User's last culture selection is saved in all clients.

Learn more...

- **Date, Time, Number, and Currency Formats**
  Ideation Station Feature

  Date, time, number, and currency formats are now determined by the User's operating system's region setting for all CSM Windows-based clients and for the Microsoft Edge browser. For other web browsers, date, time, number, and currency formats are determined by the browser's language settings; the top language set for a browser is used for these formats.

  Learn more....

- **"Changes Only" Language Pack Applications**

  Blueprints created when a Language Pack is applied now only include definitions modified by the Language Pack. In addition, you can create and apply Language Packs that contain only new or modified definitions made in a Blueprint or mApp Solution.

  Learn more...

- **Grid and Form Updates for Deleted Cultures**

  Definitions for deleted cultures are now removed from Grids and Forms. This prevents errors from occurring when you publish a Blueprint for which a culture is deleted.

- **Culture-specific Field Data for New Cultures**

  When a new culture is added, newly created culture-specific Fields are automatically populated with data from the primary culture. This prevents the culture-specific Fields from having null values.

- **Culture-specific One-Step Actions**
  Ideation Station Feature

  You can now choose a specific culture to use when a One-Step Action is run. This is particularly useful for ensuring that email messages sent by a One-Step Action are translated into a specific language. If you do not select a specific culture, the One-Step Action runs in the culture of the User who runs the One-Step Action.
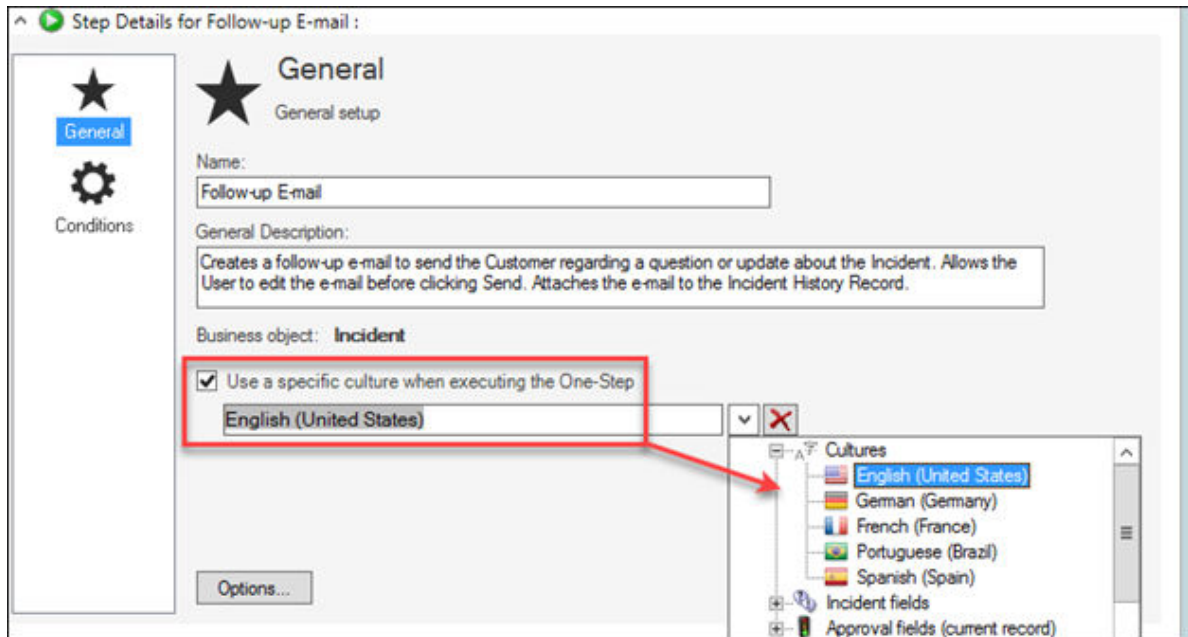
Learn more...

- **Views Included in Language Packs**
  You can now include Views when you create or apply a Language Pack that has a scope limited to specific Business Objects.

  Learn more...

  Learn more...

- **Change Log for Language Pack Translations**
  You can now view and save translation changes for a Language Pack. The log contains changes to Lookup tables, definitions, Portal strings, and platform strings. This enables you to understand the impact of your translations once you publish a Blueprint that contains the Language Pack.
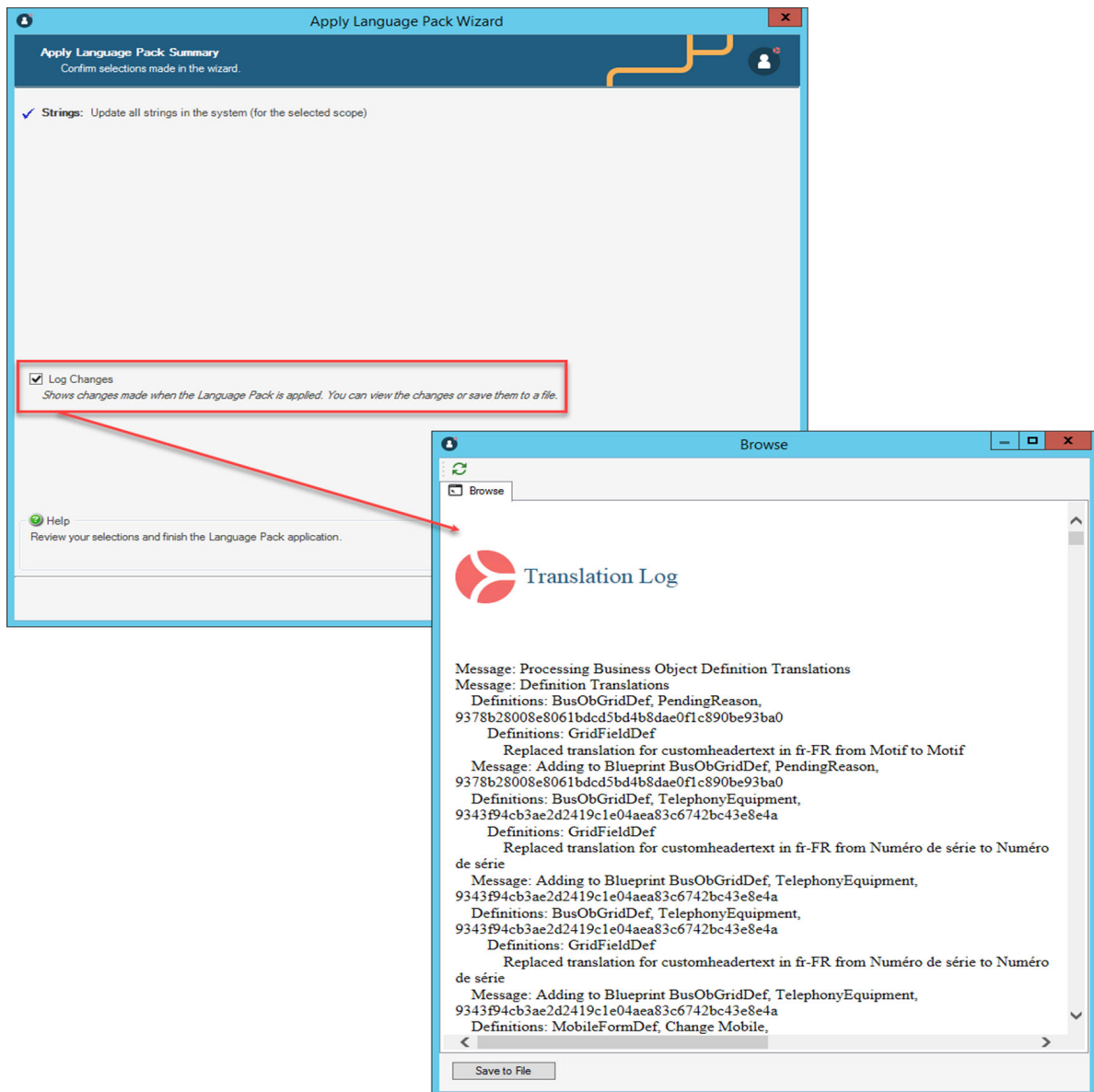
- **Consolidated Portal Translation Method**
  All Portal translations are now managed through Language Packs. The feature that allowed you to export Portal strings from the Site Manager for translation is no longer available.

Foreign Key Administration

You can automatically configure foreign key fields shared across Group Members and/or Views. This ensures that shared foreign key fields validate from the same table and field so that queries retrieve

correct data. Use the Foreign Key Administrator to automatically configure all shared foreign keys in your system.
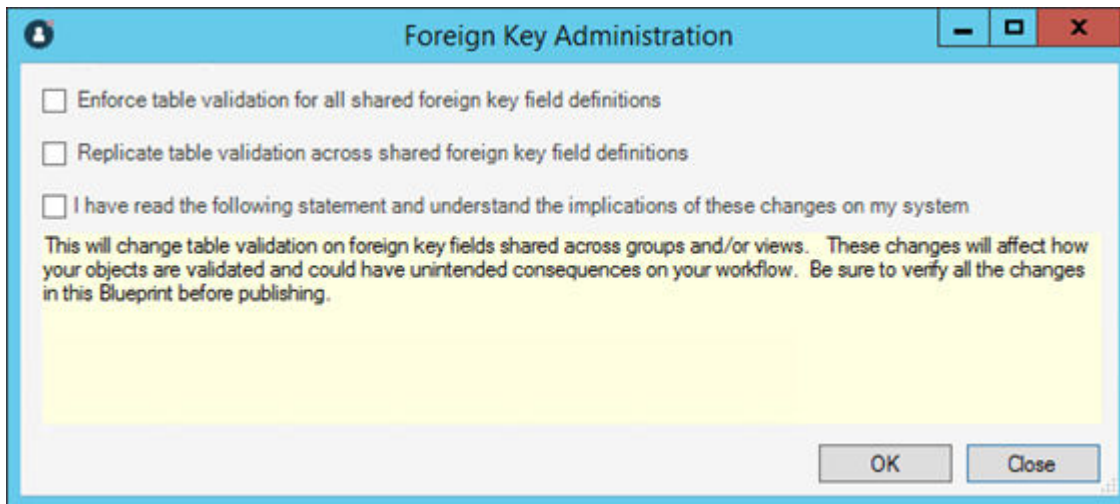
In addition, you can synchronize validation settings for matching tables for a set of shared foreign key fields. For example, the settings applied for the OLA Supplier Field can be applied to the Supplier Field for all Members for the Agreements Group.
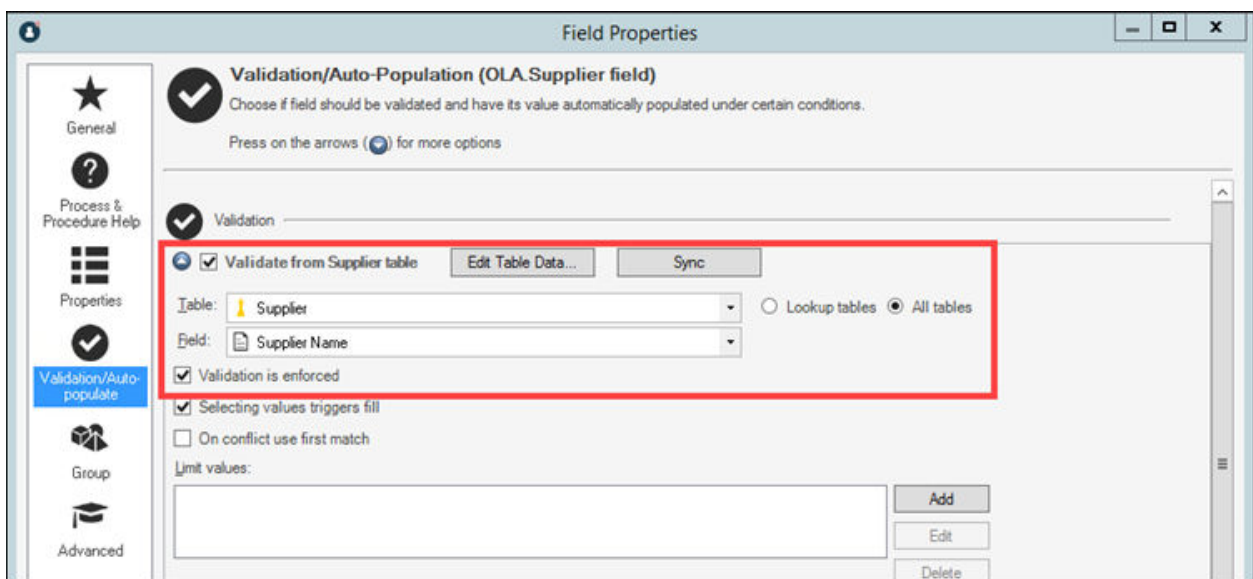
Spaces Allowed in Link Expressions

The following two formats can now be used for link Expressions:
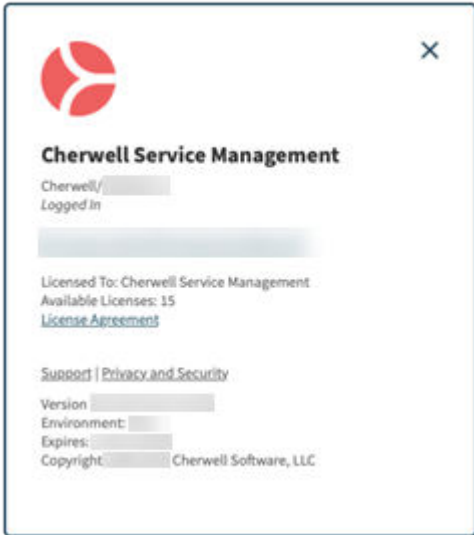
- Use URL-encoding, replacing spaces with %20.
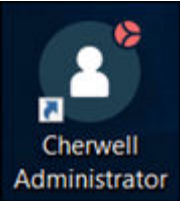
• Use a | (pipe) character as the delimiter between the link text and the URL.
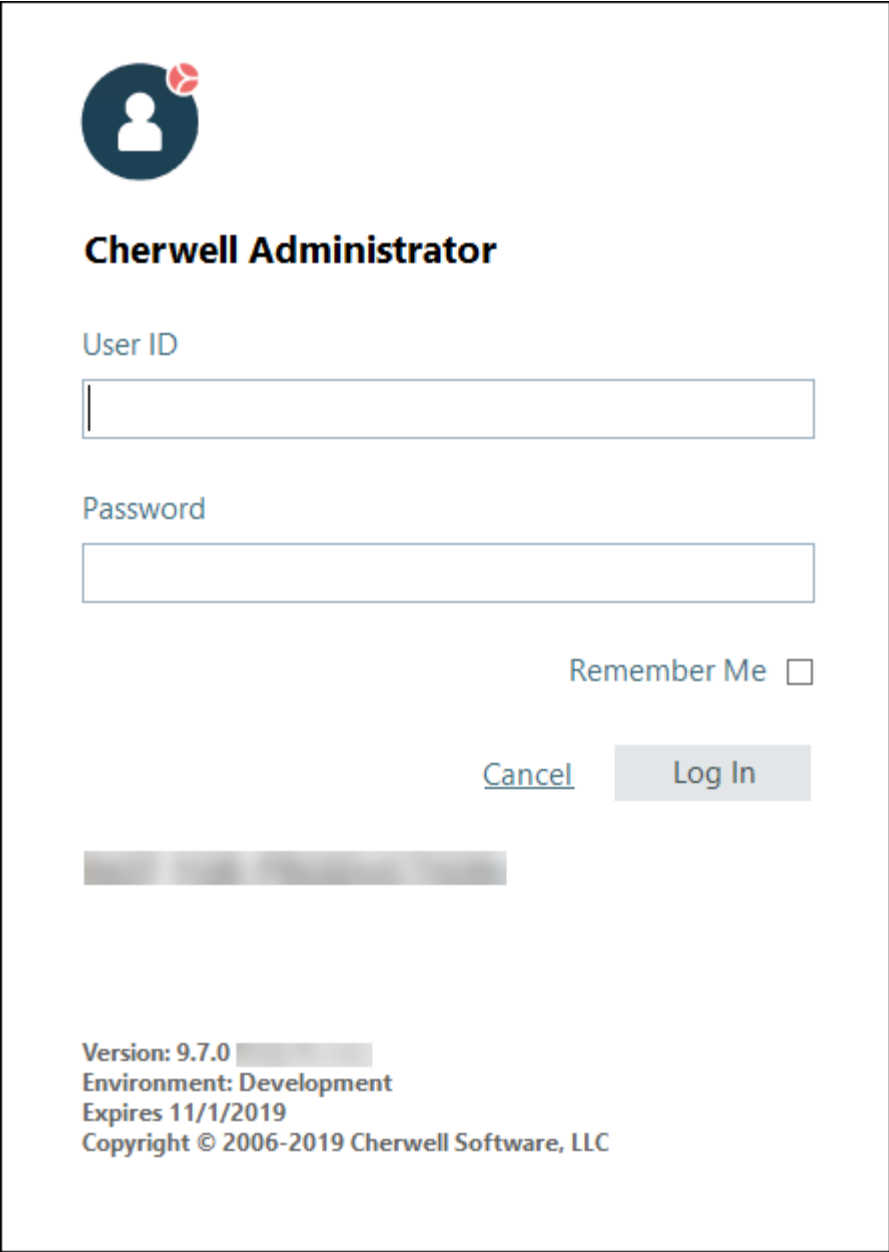
Learn more...
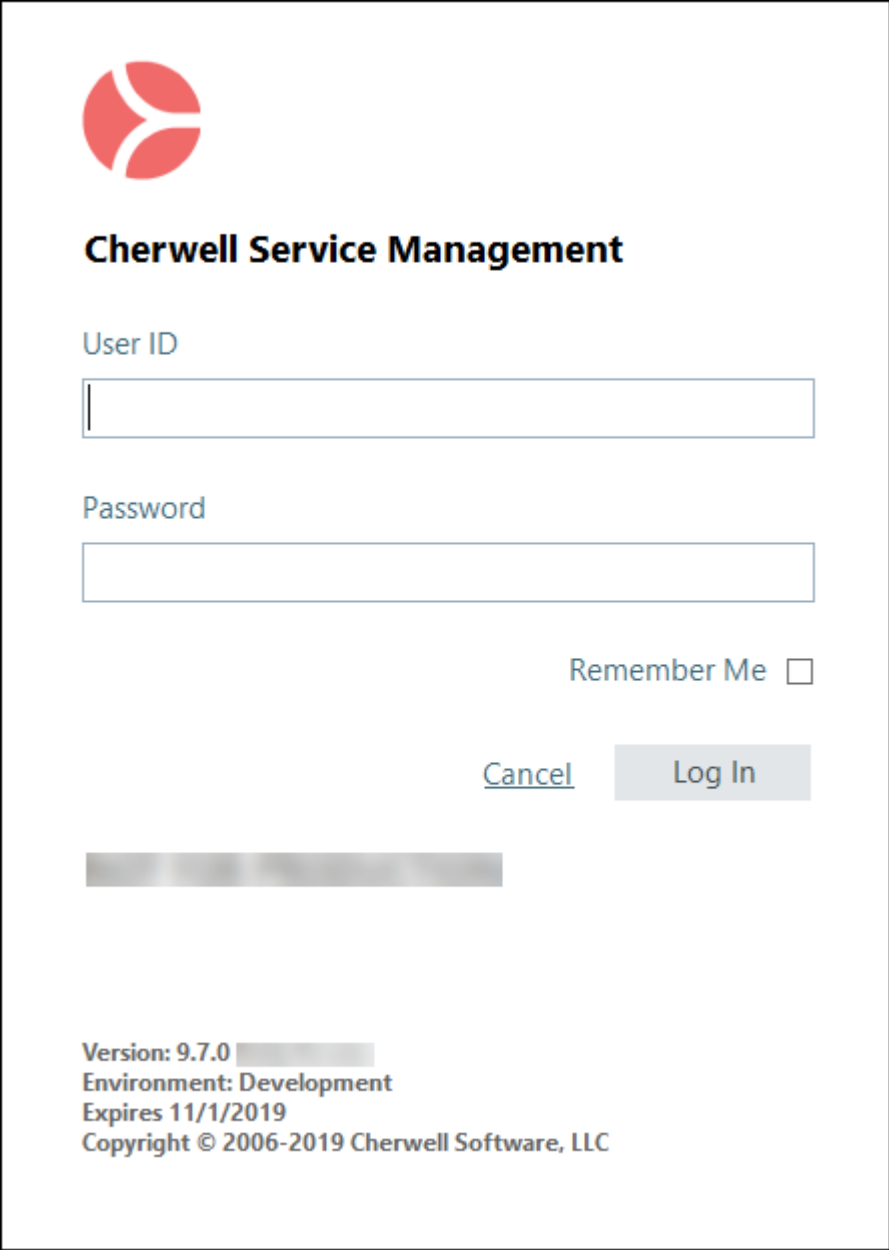
Updated Branding and Corporate Identity
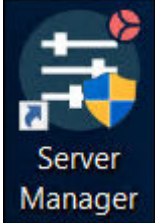
The Cherwell Service Management branding and corporate identity has been updated throughout the CSM Suite.

e	Locations	Images
t Modal	• CSM Administrator About • CSM Desktop Client About • System Utilities Tool About	
Deploy Config icon	Auto-Deploy Config	
Deployer icon	Auto-Deployer	
well Outlook Addin Installer	Cherwell Outlook Addin Installer	
well Tools icon	Cherwell Tools	
mand Bar Editor icon	Command Bar Editor	

e	Locations	Images
Administrator icon	• CSM Administrator Desktop shortcut • Top-left of CSM Administrator windows	Cherwell Administrator
Desktop Client icon	• CSM Desktop Client Desktop shortcut • Top-left of CSM Desktop Client windows	Cherwell Service Management

e	Locations	Images
Administrator Login	CSM Administrator	

e	Locations	Images
Desktop Client Login	CSM Desktop Client	**Cherwell Service Management** User ID Password Remember Me ☐ Cancel Log In Version: 9.7.0 **Environment: Development** **Expires 11/1/2019** Copyright © 2006-2019 Cherwell Software, LLC

e	Locations	Images
CSM Desktop Client Wizard Sidebar Apply mApp Wizard Sidebar	• CSM Desktop Client Wizard • Apply mApp Wizard	
Desktop Client Wizard Top er	CSM Desktop Client Wizard	
_ Editor icon	HTML Editor	
rt icon	Imports	
se Generator icon	License Generator Tool	
er Config icon	Server Config Tool	
er Manager icon	• Server Manager • Server Configurations	
em Restore icon	• System Restore Tool • System Restore > Connection Wizard	
em Upgrade icon	System Upgrade Tool	

e	Locations	Images
...chet Admin icon	Trebuchet Admin	
...uchet App icon	Trebuchet App	
...chet Import Utility icon	Trebuchet Import Utility	
...chet Server App icon	Trebuchet Server App	
...chet Server Config icon	Trebuchet Server Config	

Overview of New OOTB Content for CSM 9.7.0

Knowledge Article Content Enhancements

The Knowledge Article Content has multiple enhancements, including:

- New and Updated Knowledge Article Forms
- Enhanced Knowledge Article Workflow
- Dedicated Knowledge Article Review Teams
- New IT Knowledge Manager Dashboard

New and Updated Knowledge Article Forms

In the CSM Desktop Client and CSM Browser Client, the **Knowledge Article Overview Form** was enhanced with the following changes:

- New look and feel to match other modernized CSM forms.
- New or modified form fields:
    - **Category**: Selection determines the associated **Technical Review Team** and **Format Review Team** and autofills those form fields.
    - **Assigned Team**: Autofills to match the **Technical Review Team**.
    - **Technical Review Team**: Autofills with the Technical Review Team associated with the selected **Category**.
    - **Format Review Team**: Autofills with the Format Review Team associated with the selected **Category**.
    - **Visible on Customer Portal**: If this check box is selected, the Knowledge Article Workflow routes the form to the Format Review Team *after* the Technical Review is complete.
    - **Set Review Date**: A new Action that allows members of the Knowledge Management Teams to manually change the next **Review Date** on the form. The default Review Date is set to one year from the Publish Date.

In the CSM Desktop Client and CSM Browser Client, the *new* **Knowledge Article Read-Only** Form:

- Displays in the **Article** tab once the KA is published. This is a simplified, read-only view of the Knowledge Article for an enhanced reading experience. The **Overview** tab does not display if the KA is in **Published** Status.

- The **Edit** (pencil) button only displays for Users with permission to modify the KA.

- Includes a new **Email this article** option so Technicians can easily share the KA with others.

Enhanced Knowledge Article Workflow

The enhanced Knowledge Article Workflow provides Knowledge Administrators with a formal structure for Knowledge Articles from Draft through Retired to ensure quality control of published articles.

There are two new Phases/Statuses in the workflow:

- **Technical Review: ITKM Technical Review Team** member reviews the KA for technical accuracy and approves the KA by selecting **Next: Technical Review Complete**. If **Visible on Customer Portal** is NOT selected on the form, One-Step Action changes Status to Published. If **Visible on Customer Portal** is selected on the form, One-Step Action changes Status to Formatting Review, an email is sent to Formatting Review Team, and KA becomes read-only and is editable only by the Formatting Review Team.

- **Formatting Review:** If **Visible on Customer Portal** is selected on the form, a member of the **Format Review Team** reviews KA and approves it by selecting **Next: Formatting Review Complete**. One-Step Action changes Status to Published.

Dedicated Knowledge Article Review Teams

The enhanced Knowledge Article Workflow includes the following *new* Knowledge Management Teams:

- **Technical Review Teams**: Members of these teams review Knowledge Article Forms when they are in **Technical Review** Status.
  - ◦ **ITKM - Enterprise**
  - ◦ **ITKM - HR**
  - ◦ **ITKM - IT**
- **Format Review Team**: Members of the Format Review Team review the Knowledge Article Form after the Technical Review if the Knowledge Article is visible on the CSM Customer Portal.
  - ◦ **Formatting**
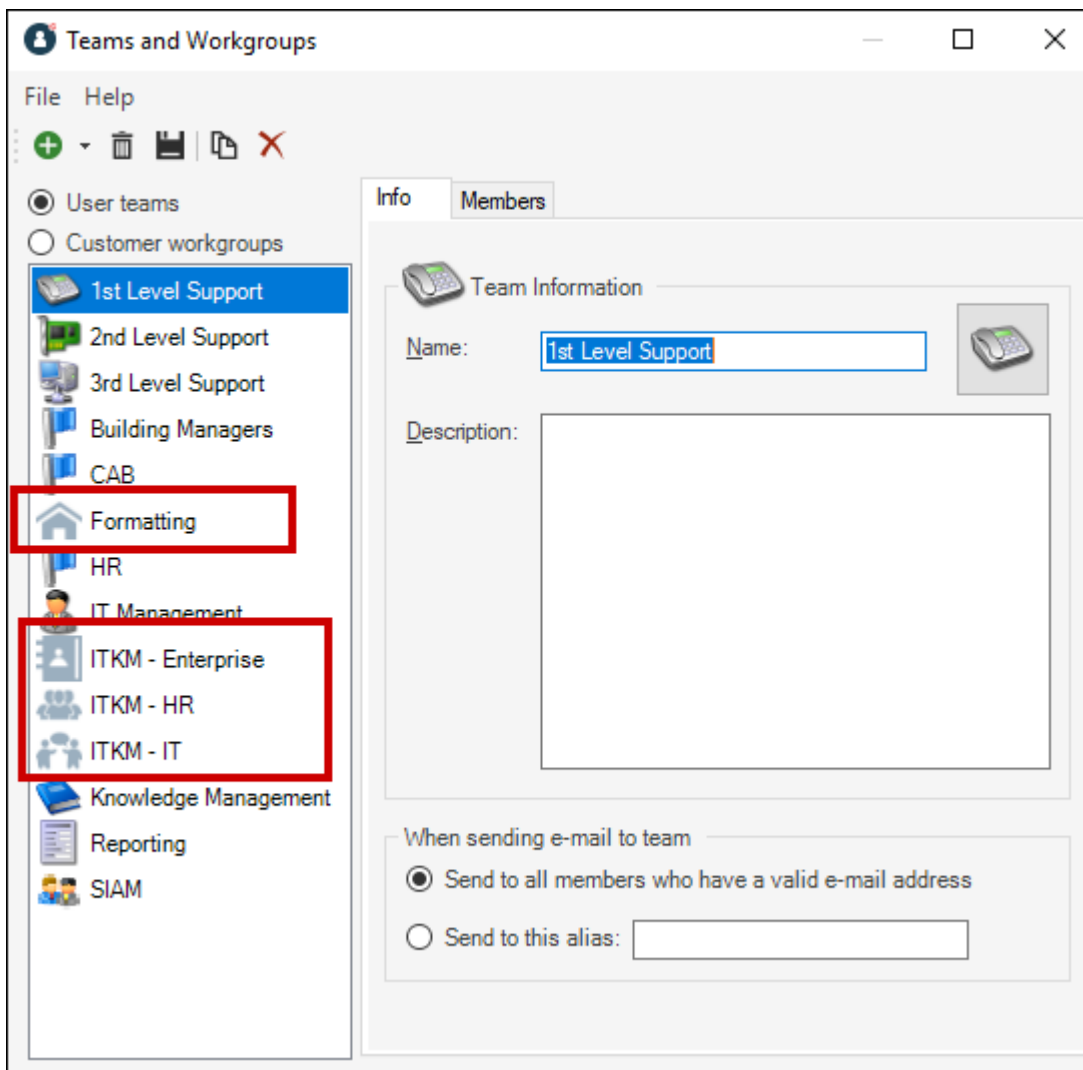
Learn more...

New IT Knowledge Manager Dashboard

The new **IT Knowledge Manager Dashboard** is available to members of the Knowledge Management Teams to help them manage the KA Workflow. This Dashboard is listed in the Dashboard Manager in the **Global > Knowledge Management** folder as **Knowledge IT**.

[Learn more...](#)

CMDB Installed Software Form Redesign

The CMDB Installed Software Form has a new look with the same layout as other redesigned CSM forms. It is designed with a modern look and improved usability. The following image shows the new form layout.

CMDB Installed Service Form Redesign

The CMDB Installed Service Form has a new look with the same layout as other redesigned CSM forms. It is designed with a modern look and improved usability. The following image shows the new form layout.

Submit On Behalf Of

You now have the ability to submit an Incident or Request on behalf of another User. Select **Submit on Behalf Of** or use the **Add Requester** link.

Learn more...