



What's New in CSM 9.7.0?

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- Cherwell Service Management
- Cherwell Asset Management

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Contents

Overview of What's New in CSM 9.7.0.....	4
Overview of New OOTB Content for CSM 9.7.0.....	32

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

CD-Total Open Incidents

Type	Owned By Team	ID...	Customer Name	Created Date Time	Status	Description
Incident	1st Level Support	100957	Molly Isaacs	3/25/2019 1:12 PM	Reopened	Unable to print to the network printer. Tried multiple times
Incident	1st Level Support	100958	Eric Lambert	3/26/2019 9:33 AM	Reopened	Virus Reported on PC
Incident	1st Level Support	101322	Molly Isaacs	4/14/2019 10:05 AM	In Progress	Computer has crashed and will not boot.
Incident	1st Level Support	101325	Montell Maalouf	4/14/2019 12:05 PM	Assigned	The upstairs printer is producing streaky printouts.
Incident	1st Level Support	101326	John Allard	4/14/2019 12:21 PM	Pending	E-mail isn't sending for me.
Incident	1st Level Support	101330	Bruce Robertson	4/14/2019 12:32 PM	Assigned	E-mail isn't sending
Incident	1st Level Support	102026	Jamie Young	4/21/2019 11:27 AM	Assigned	Photoshop is not working
Incident	1st Level Support	102027	Jacalyn Medina	4/21/2019 11:49 AM	Assigned	Keyboard is not working
Incident	1st Level Support	102028	Kylie Murphy	4/21/2019 12:01 PM	Assigned	Keyboard is not working.
Incident	1st Level Support	102031	Marci Larosa	4/21/2019 1:14 PM	Assigned	Mouse does not work
Incident	1st Level Support	102032	Amy Lynch	4/21/2019 1:22 PM	In Progress	Monitor is not working

Figure 2. Search Results Grid in Desktop Client

Incidents

All Open Incidents

Drag a column header here to group by that column

Type	Owned By Team	ID	Customer Name	Created Date Time	Status	Description	SLA Resolve By Deadline
Incident	1st Level Support	100957	Molly Isaacs	3/25/2019 1:12 PM	Reopened	Unable to print to the network printer. Tried mul...	3/29/2019 1:12 PM
Incident	1st Level Support	100958	Eric Lambert	3/26/2019 9:33 AM	Reopened	Virus Reported on PC	3/27/2019 1:00 PM
Incident	1st Level Support	101322	Molly Isaacs	4/14/2019 10:05 AM	In Progress	Computer has crashed and will notboot.	4/14/2019 3:05 PM
Incident	1st Level Support	101325	Montell Maalouf	4/14/2019 12:05 PM	Assigned	The upstairs printer is producing streaky printouts.	4/14/2019 8:05 PM
Incident	1st Level Support	101326	John Allard	4/14/2019 12:21 PM	Pending	E-mail isn't sending for me.	4/14/2019 3:21 PM
Incident	1st Level Support	101330	Bruce Robertson	4/14/2019 12:32 PM	Assigned	E-mail isn't sending	4/14/2019 2:32 PM
Incident	1st Level Support	102026	Jamie Young	4/21/2019 11:27 AM	Assigned	Photoshop is not working	4/24/2019 11:27 AM
Incident	1st Level Support	102027	Jacalyn Medina	4/21/2019 11:49 AM	Assigned	Keyboard is not working	4/24/2019 11:49 AM
Incident	1st Level Support	102028	Kylie Murphy	4/21/2019 12:01 PM	Assigned	Keyboard is not working.	4/24/2019 12:01 PM
Incident	1st Level Support	102031	Marci Larosa	4/21/2019 1:14 PM	Assigned	Mouse does not work	4/23/2019 10:00 AM
Incident	1st Level Support	102032	Amy Lynch	4/21/2019 1:22 PM	In Progress	Monitor is not working	4/21/2019 6:22 PM
Incident	1st Level Support	102035	Bruce Robertson	4/26/2019 10:23 AM	Assigned	Monitor is Broken	4/29/2019 1:24 PM
Incident	1st Level Support	102071	Bruce Robertson	4/22/2019 9:27 AM	Assigned	Problem 10166 (Upstairs printer is broken) affect...	4/24/2019 7:28 AM
Incident	1st Level Support	102083	Jacalyn Medina	4/24/2019 9:29 AM	Assigned	Outlook keeps crashing, works for a minute then...	4/29/2019 9:29 AM
Incident	1st Level Support	102084	Curtis Parker	4/26/2019 9:42 AM	Assigned	Outlook is broken, fails to receive any emails.	4/28/2019 9:42 AM
Incident	1st Level Support	102085	Klein Gusev	4/25/2019 9:52 AM	In Progress	Outlook won't connect to the Exchange server	4/26/2019 12:53 PM
Incident	1st Level Support	102235	Susan Malach	9/1/2019 2:51 PM	In Progress	it says it needs to update Susan's Anti-Virus but...	9/4/2019 2:51 PM
Incident	1st Level Support	102237	Susan Malach	9/1/2019 11:31 PM	Pending	PC Will not start	9/20/2019 11:50 AM
Incident	1st Level Support	102256	Josh Wilson	9/8/2019 3:31 PM	Reopened	Having trouble with the network printer	9/12/2019 9:32 AM

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 **Always show items as cards**. Selecting this check box means you can add extra text fields for **Subtitle**, **Rating** and **Footer**.

Widget

Name: Type: ⌵ Action Catalog

Display Options
Decide how actions are displayed

Style and Theme

Style: ⌵ Cards with Search

Theme: ⌵ A/C Dark Blue

Always show items as cards

Fields Holding Display Text

Title text: ⌵ Alt 1 Status Command Name

Subtitle: ⌵

Rating: ⌵ Status

Description: ⌵ Description

Footer: ⌵ Last Modified By

Show Image next to each command

Field with image: ⌵ Status

Expression: ⋮ √x

Use an expression to enable/disable actions

Expression: ⋮ √x

Info Preview... OK Cancel

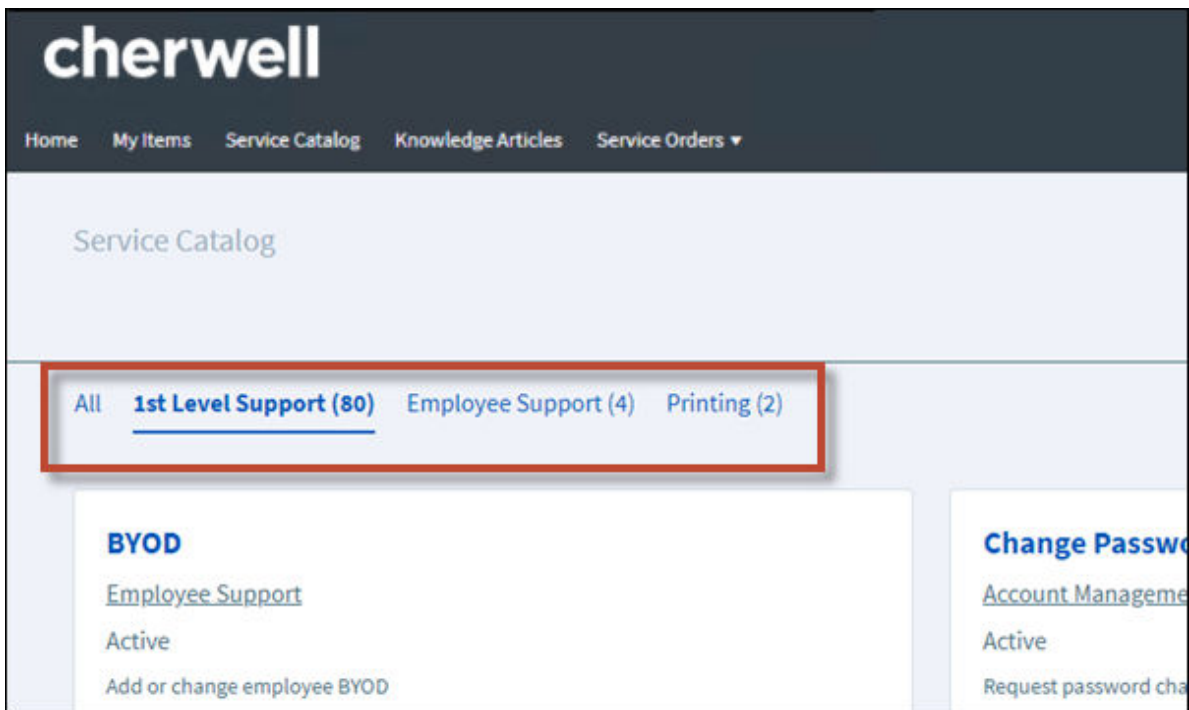
[Learn more ...](#)

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

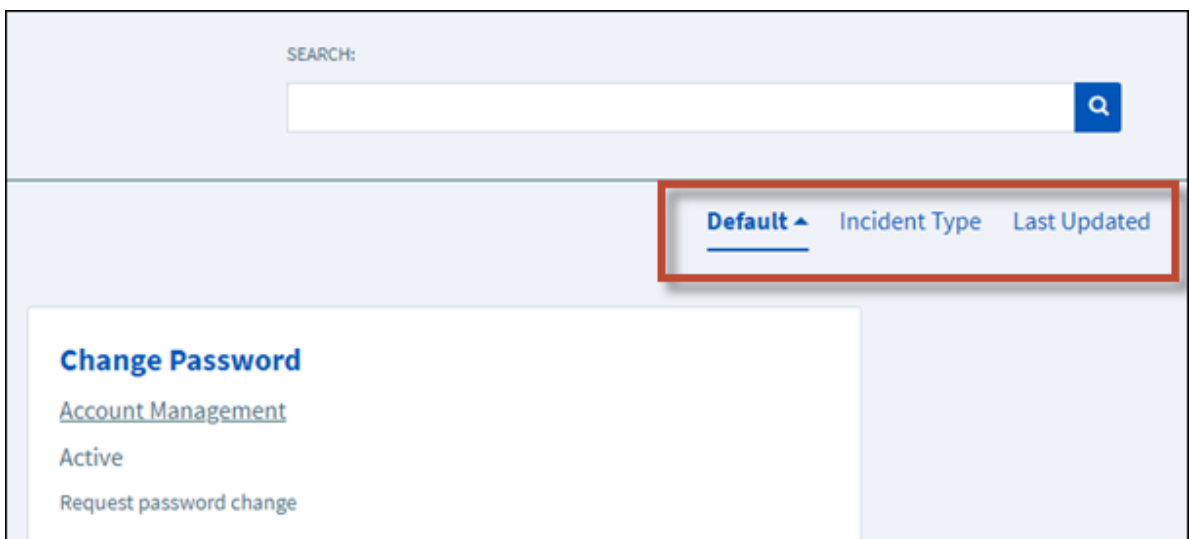
Administrators can now add sorts and filters to an Action Catalog Widget to make accessing data easier for users of Portal Sites. Use the Actions page (accessed from within the Action Catalog Widget Properties window) to add a filter that uses a saved search.



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 than one sort has been added, they appear on the top right hand side of the Customer Portal and an arrow shows direction of sorting.



[Learn more...](#)

Form Improvements

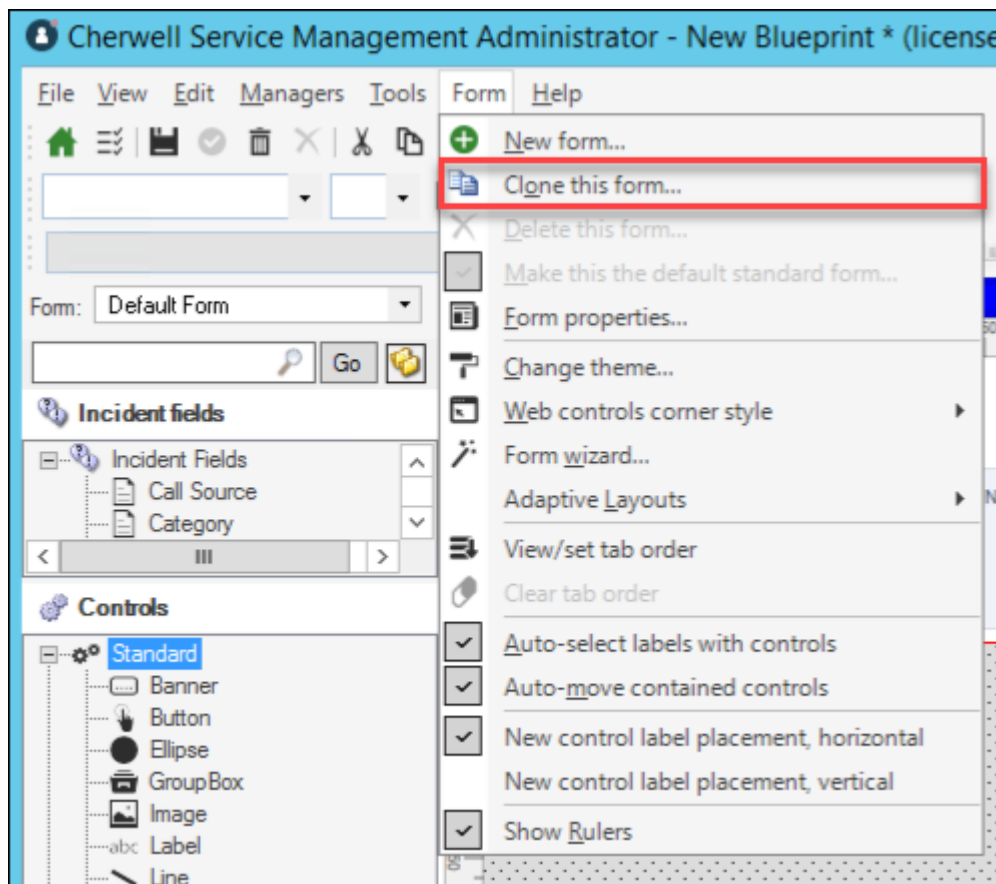
- **Clone a Form**

- 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

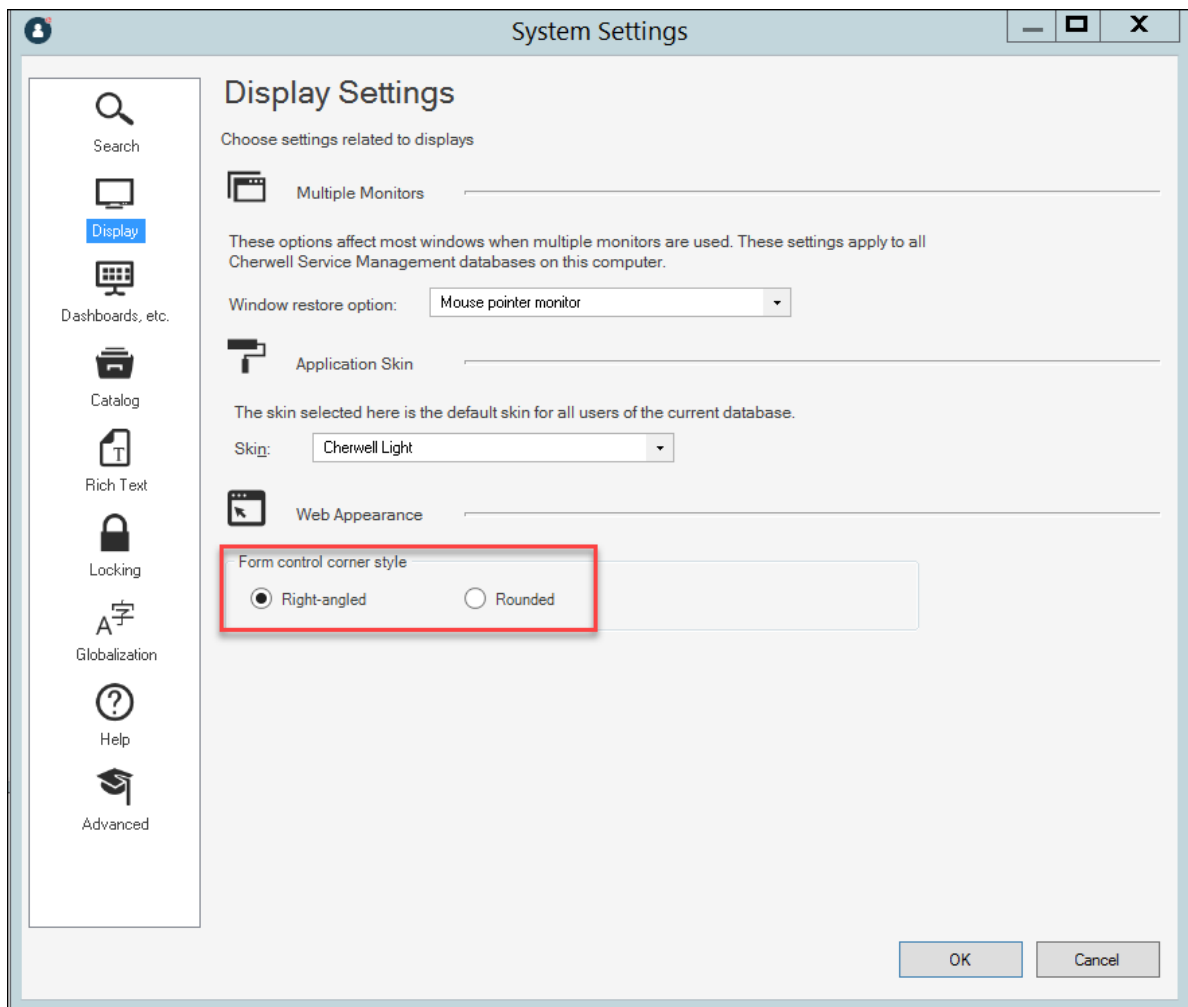
You can now customize the corner appearance of Form controls on the Customer Portal and CSM Browser Client. You can choose either a new rounded style or the traditional right-angled style. You can choose this preference globally in the Display Settings section (within System Settings) of the CSM Administrator, 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**

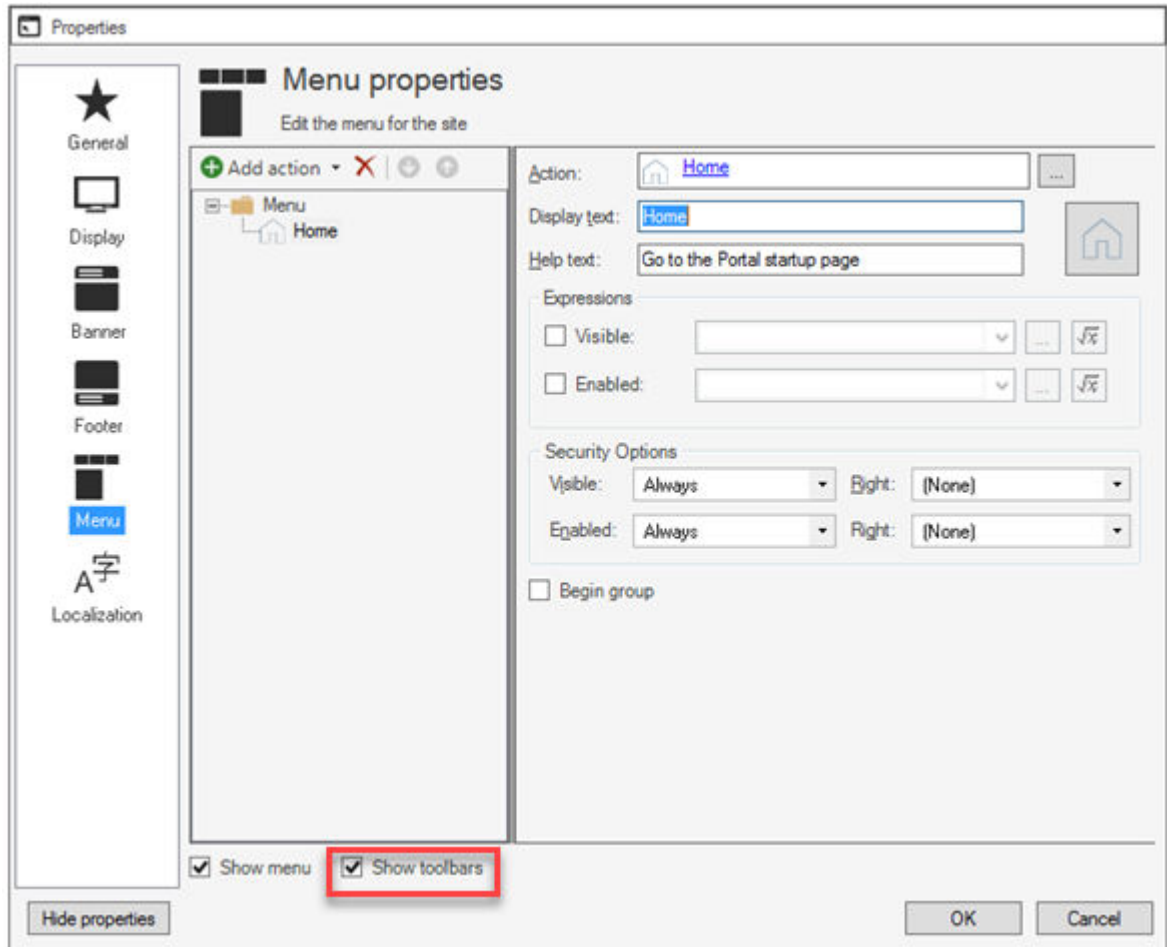
An improvement to the API removes the limits on exporting search results. In previous releases, exported search results were limited to 100,000 rows of data. Now, search results and exports will allow multiple pages of records with each page being limited to a maximum of 100,000 rows of data. Also, version 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.

Publish Options

Publish Blueprint changes to the live system.

Publishing options:

Before publishing

- 1. Save Blueprint
 - Create rollback Blueprint
- 2. Scan for errors
 - Stop on warnings
 - Globalization Options
 - Only scan enabled cultures
 - Only scan current culture
 - Scan all cultures
- 3. Lock system
- 4. Pause all Services
- 5. Ignore Conflicts

Publishing

- 6. Publish changes

After publishing

- 7. Rebuild Full-Text Catalog
- 8. Restart Services
- 9. Unlock system
- 10. Run a One-Step
 - ...

Publish Cancel

[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.

Step Details for Go to a record :

Name:

Go to an arbitrary record

Business Object (ID): Show all

Group member:

Field:

Value:

Go to current record in a relationship

Relationship:

Open new record after action

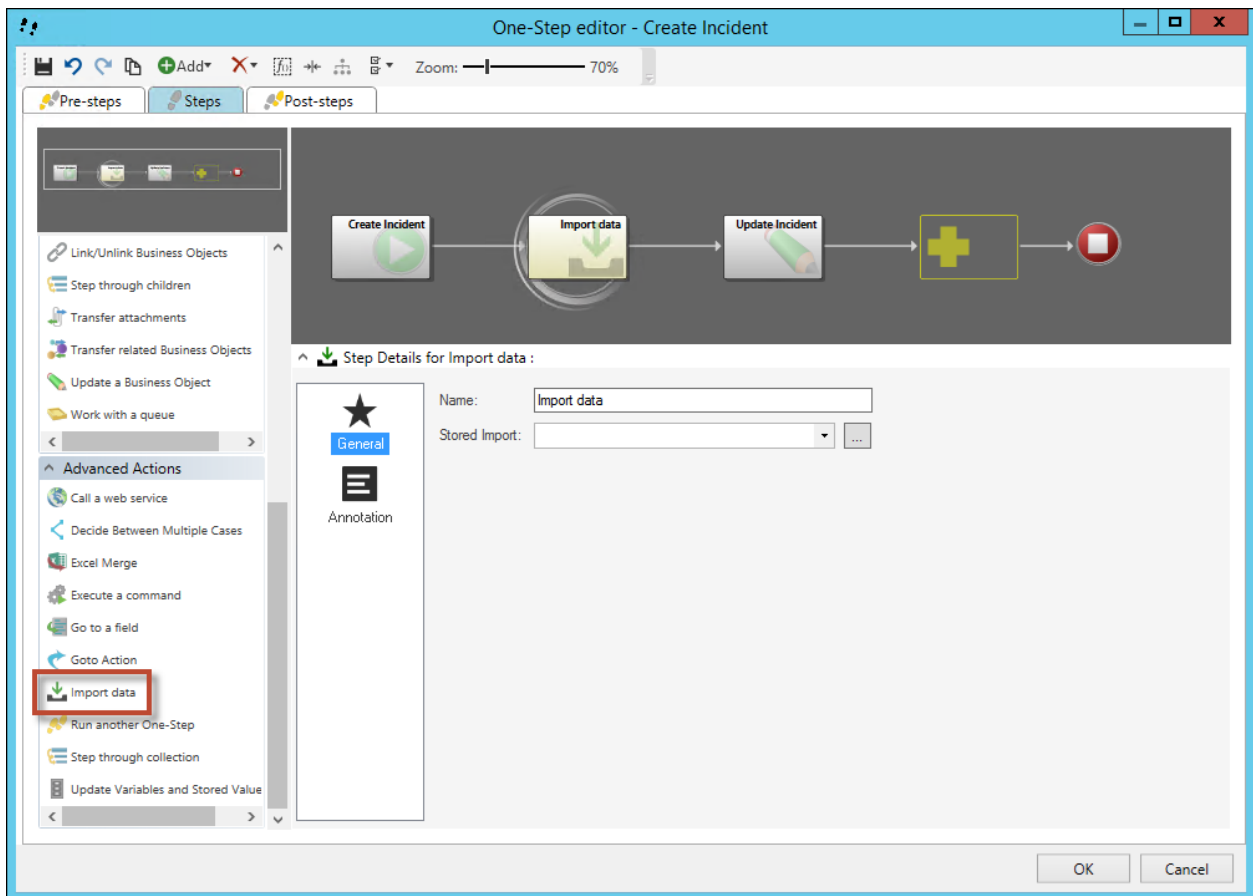
After the upgrade to CSM 9.7.0, existing Go to Record a Actions that go to an arbitrary record will use the record IDs of the Business Object and Field values.

[Learn more...](#)

Run a Stored Import from a One-Step Action

Ideation Station Feature

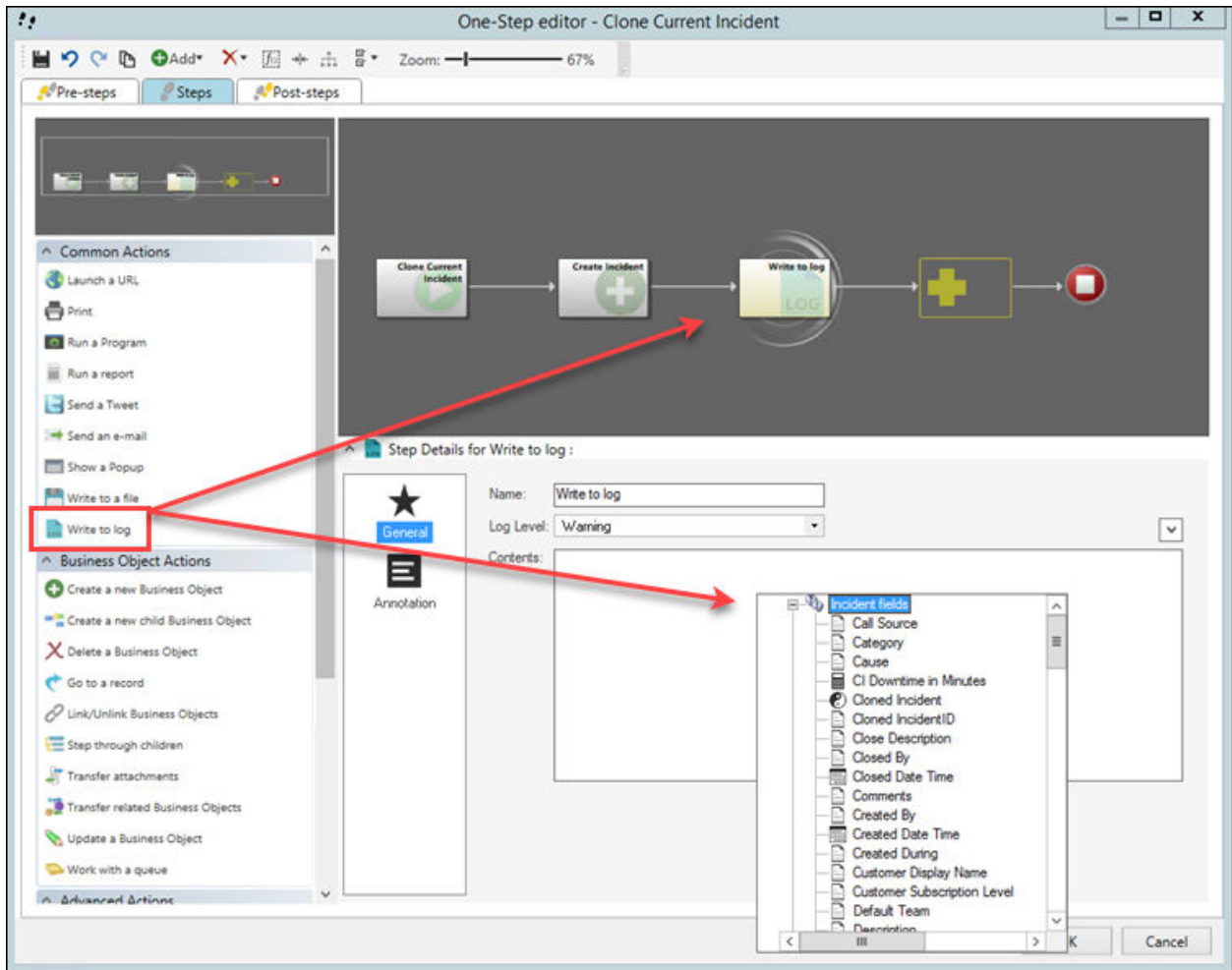
You can now use the Import Data Action to run a stored import (.csv imports) from the Stored Import Manager using a One-Step Action.



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.

Dashboard Properties

Dashboard

Name: Portal (not logged in)

Description:

Title Text:

Associate: (None)

Options

Display

Theme: Default Portal

Allow user's chosen theme to override dashboard theme

Allow view access to anonymous users

Options... OK Cancel

[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.

The screenshot shows a 'Widget' configuration window. At the top, the 'Name' field is 'Service Catalog' and the 'Type' is 'Action Catalog'. The 'General' tab is selected, showing a star icon and the text 'General' and 'Information for the Action Catalog Title'. Below this, there are fields for 'Action Catalog Title', 'Image' (with a globe icon), 'Title' (containing 'Service Catalog'), and 'Description'. A red box highlights the checked checkbox 'Allow Anonymous Access to Action Catalog in the Portal'. At the bottom, there are buttons for 'Info', 'Preview...', 'OK', and 'Cancel'.

[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.

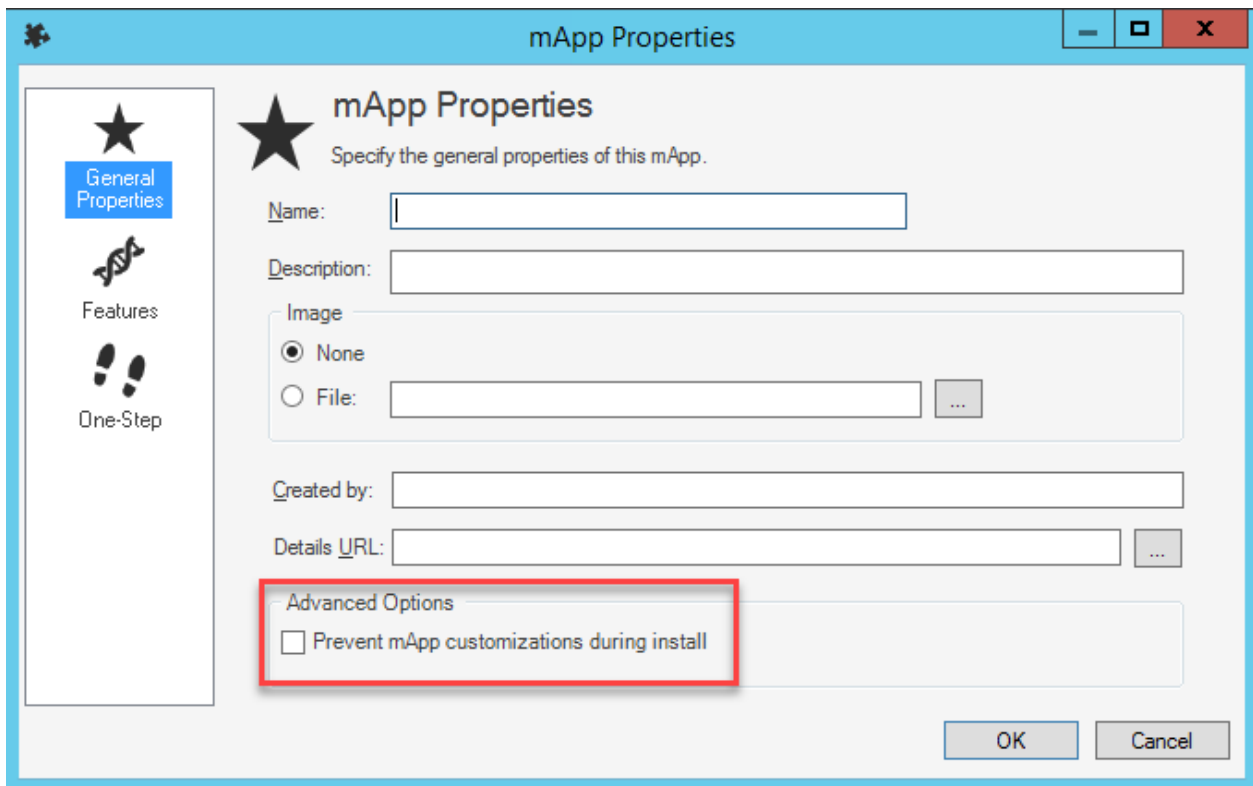
Use the ViewAnonymous() System Function to restrict Anonymous User visibility of a specific [Form Control](#) or [Widget](#) by setting the Value to *false* for that control. If the Value is set to *False*, the control is not visible to Anonymous Users.

The screenshot shows a 'Custom Expression' dialog box. At the top, there's a close button (X). Below it, the 'Name' field contains 'Custom expression'. A 'Logical Expression' section is visible, featuring a yin-yang icon. It has three fields: 'Value:' with a dropdown menu showing 'ViewAnonymous()', 'Operator:' with a dropdown menu showing 'Equals', and another 'Value:' field with a dropdown menu showing 'False'. Below these fields is an 'Advanced' dropdown menu. At the bottom, there are three buttons: 'Convert to Stored Expression', 'OK', and 'Cancel'.

[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.

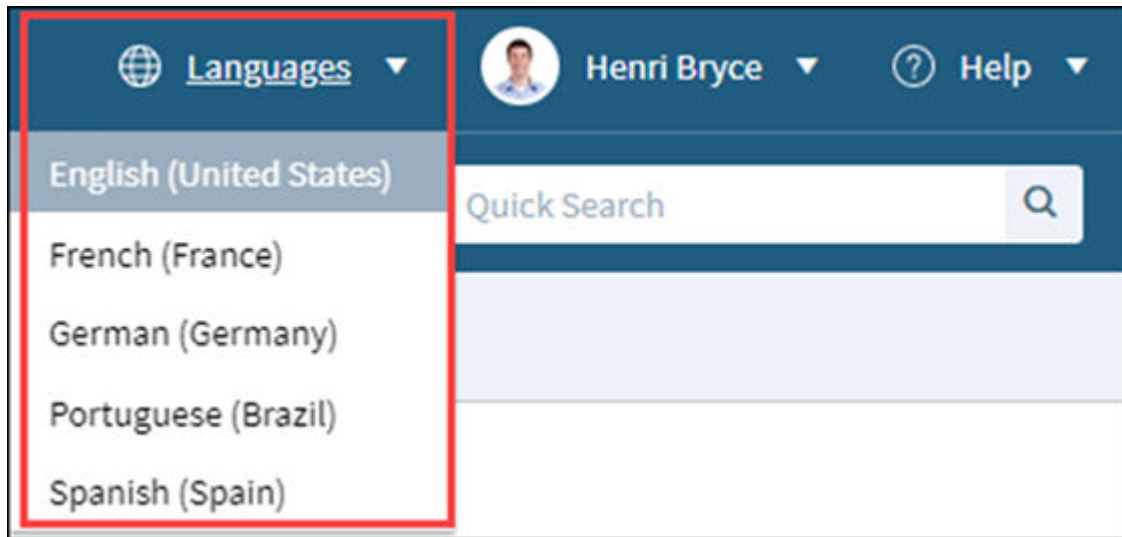
[Learn more...](#)

- **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.

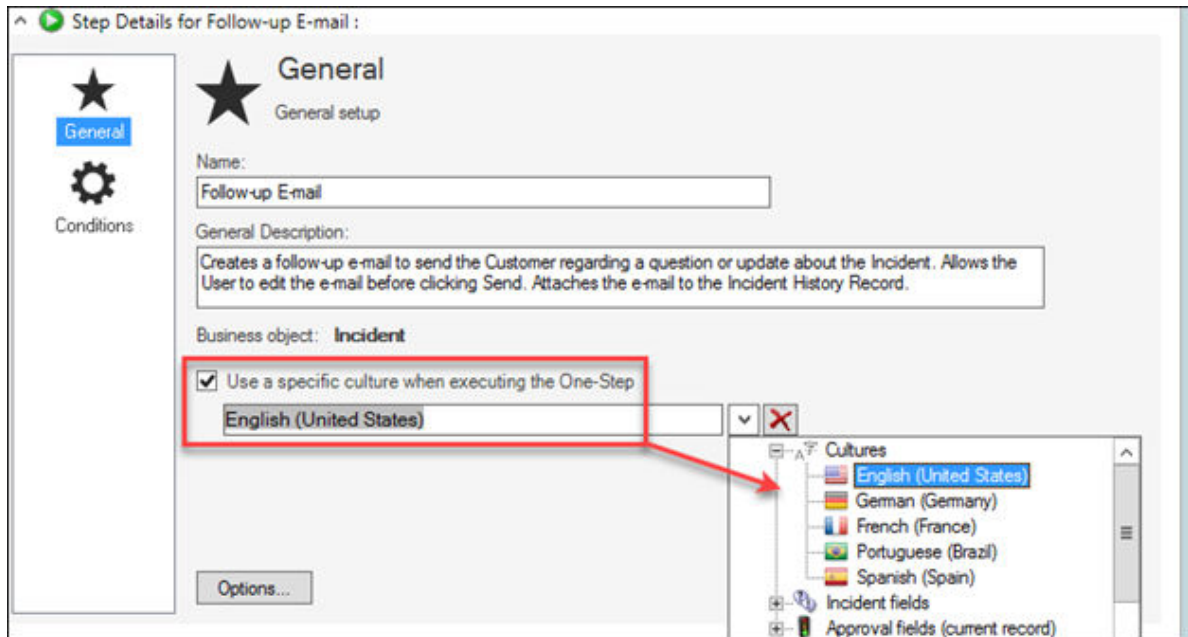
- **Culture-specific Field Data for New Cultures**

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**

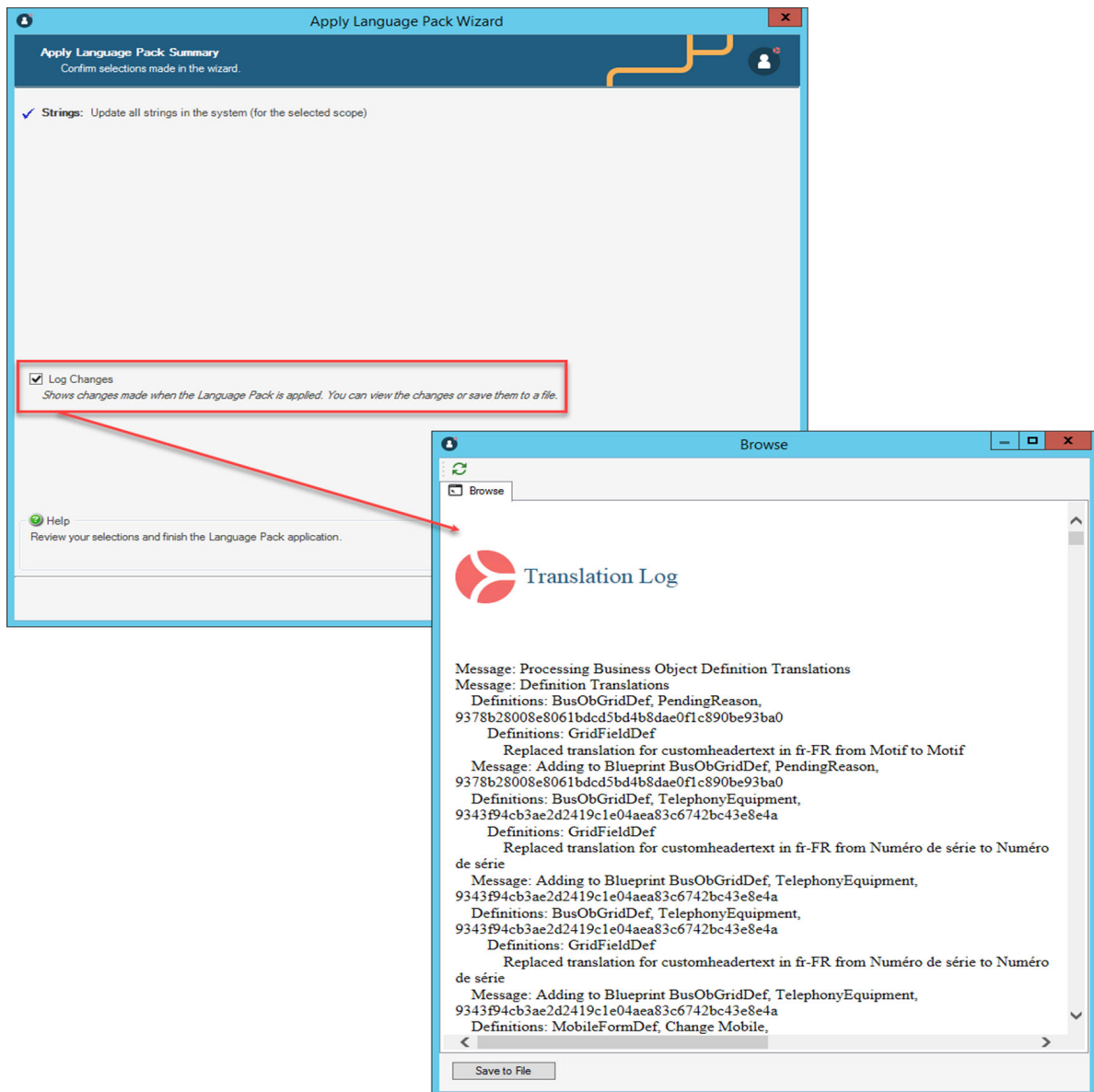
You can now include Views when you create or apply a Language Pack that has a scope limited to specific Business Objects.

[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.



[Learn more...](#)

- **Consolidated Portal Translation Method**

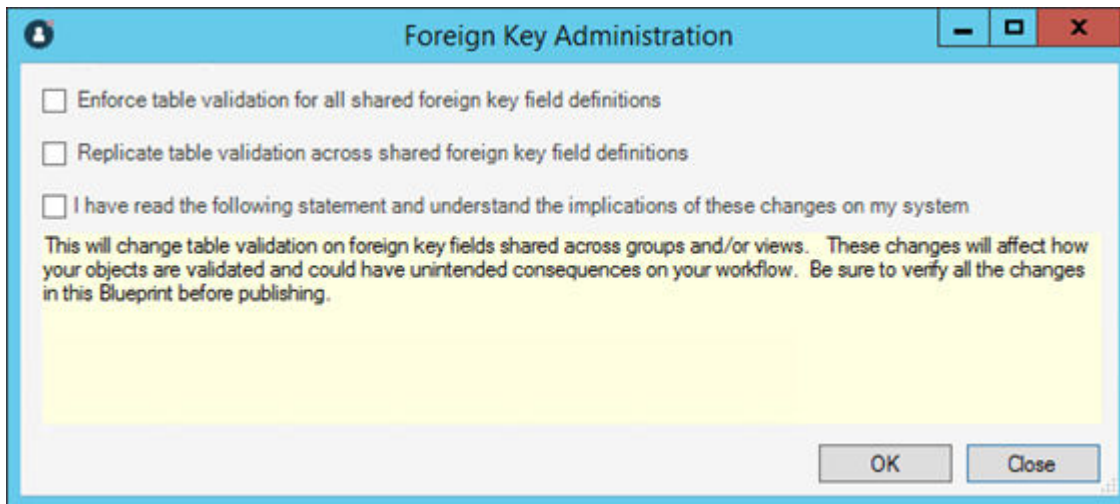
All Portal translations are now managed through Language Packs. The feature that allowed you to export Portal strings from the Site Manager for translation is no longer available.

[Learn more...](#)

Foreign Key Administration

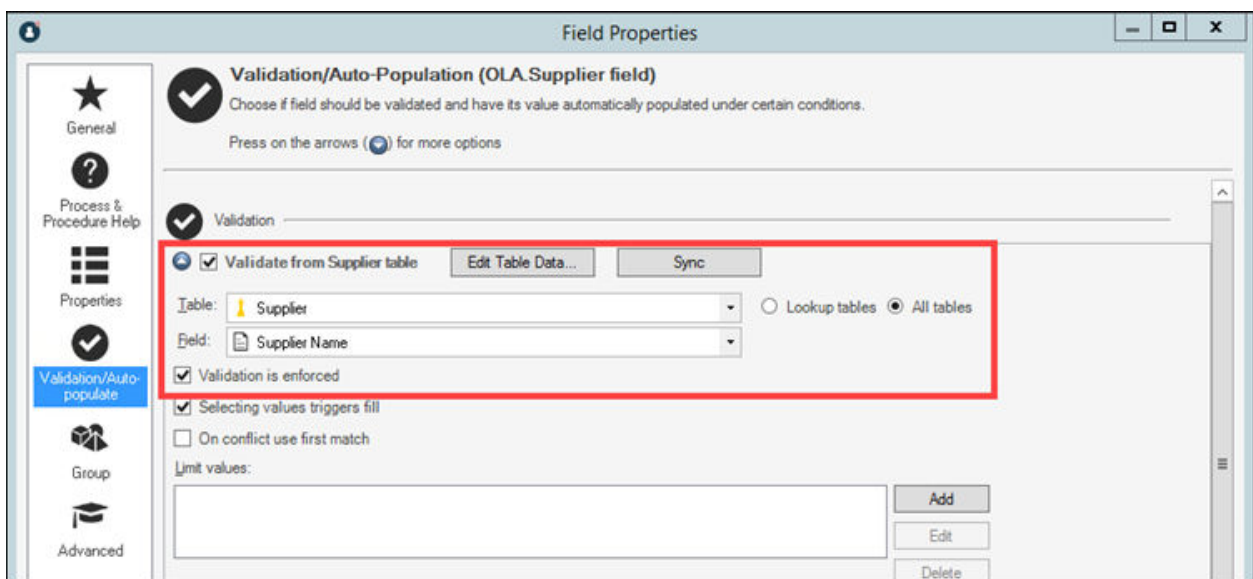
You can automatically configure foreign key fields shared across Group Members and/or Views. This ensures that shared foreign key fields validate from the same table and field so that queries retrieve

correct data. Use the Foreign Key Administrator to automatically configure all shared foreign keys in your system.



[Learn more...](#)

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.



[Learn more...](#)

Spaces Allowed in Link Expressions

The following two formats can now be used for link Expressions:

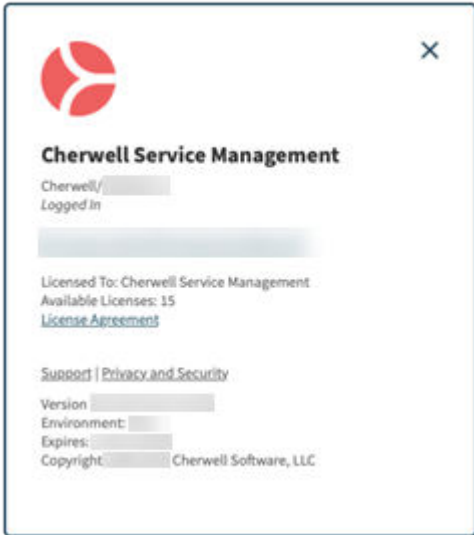





- Use URL-encoding, replacing spaces with %20.

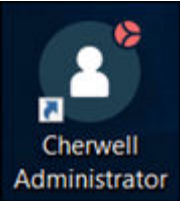



- Use a | (pipe) character as the delimiter between the link text and the URL.

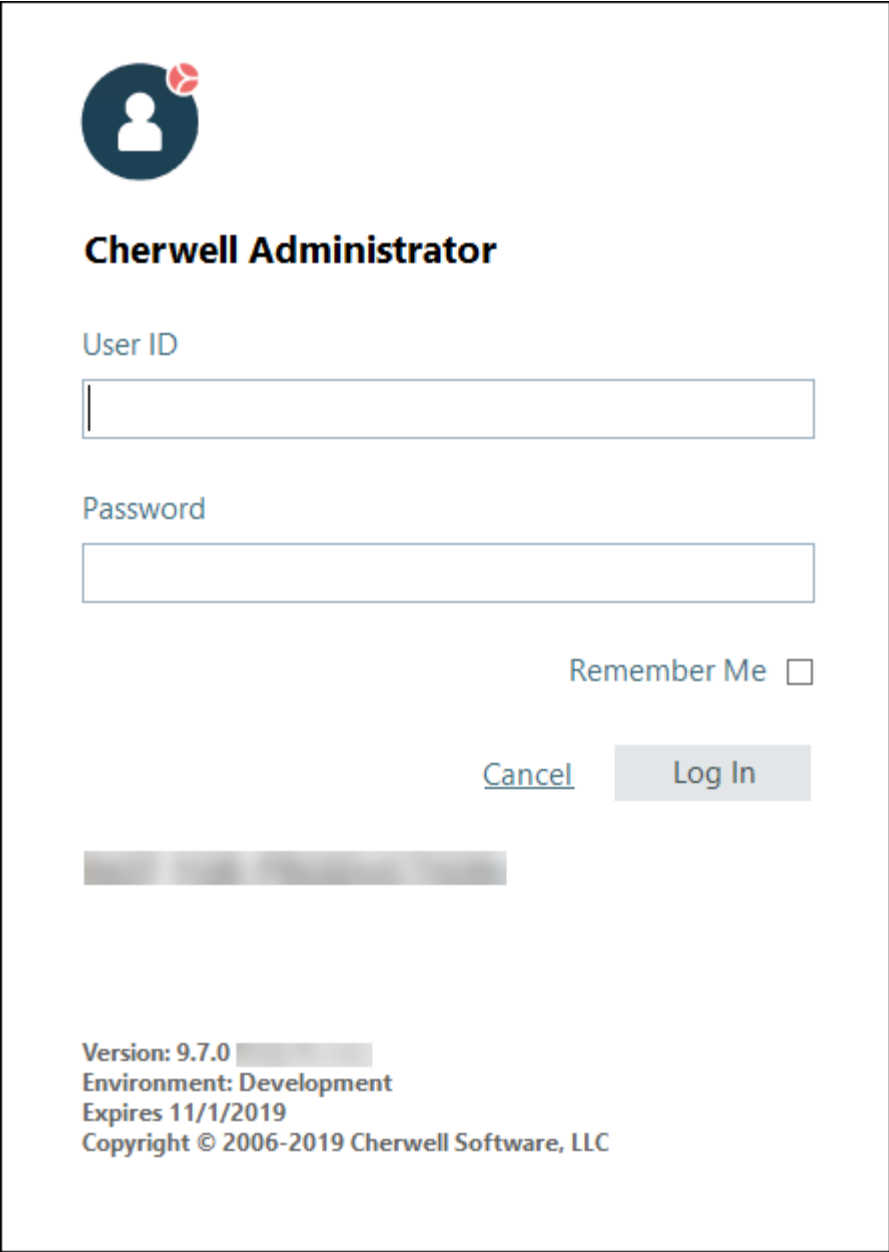
[Learn more...](#)

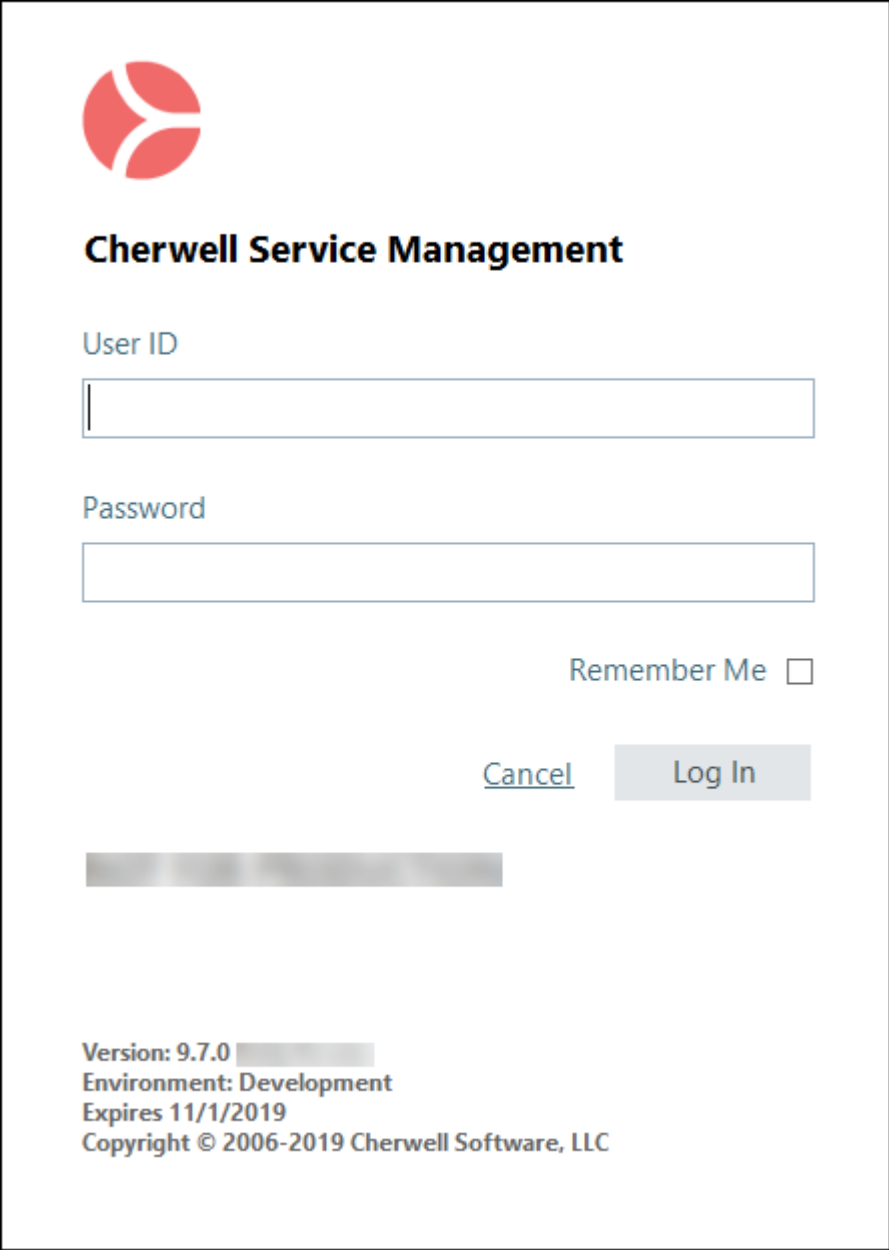
Updated Branding and Corporate Identity







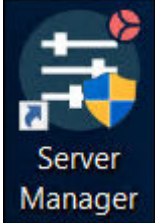



The Cherwell Service Management branding and corporate identity has been updated throughout the CSM Suite.






	Locations	Images
Modal	<ul style="list-style-type: none"> • CSM Administrator About • CSM Desktop Client About • System Utilities Tool About 	
Deploy Config icon	Auto-Deploy Config	
Deployer icon	Auto-Deployer	
Cherwell Outlook Addin Installer	Cherwell Outlook Addin Installer	
Cherwell Tools icon	Cherwell Tools	
Command Bar Editor icon	Command Bar Editor	

	Locations	Images
Administrator icon	<ul style="list-style-type: none"> • CSM Administrator Desktop shortcut • Top-left of CSM Administrator windows 	 
Desktop Client icon	<ul style="list-style-type: none"> • CSM Desktop Client Desktop shortcut • Top-left of CSM Desktop Client windows 	 

	Locations	Images
Administrator Login	CSM Administrator	 <p>The login form for the Cherwell Administrator. It features a user icon, the title "Cherwell Administrator", and two input fields for "User ID" and "Password". A "Remember Me" checkbox is located to the right of the password field. Below the fields are "Cancel" and "Log In" buttons. At the bottom, there is a blurred area and version information: "Version: 9.7.0", "Environment: Development", "Expires 11/1/2019", and "Copyright © 2006-2019 Cherwell Software, LLC".</p>

	Locations	Images
Desktop Client Login	CSM Desktop Client	 <p>Cherwell Service Management</p> <p>User ID</p> <p>Password</p> <p>Remember Me <input type="checkbox"/></p> <p>Cancel Log In</p> <p>Version: 9.7.0 Environment: Development Expires 11/1/2019 Copyright © 2006-2019 Cherwell Software, LLC</p>

	Locations	Images
<p>CSM Desktop Client Wizard Sidebar</p> <p>Apply mApp Wizard Sidebar</p>	<ul style="list-style-type: none"> • CSM Desktop Client Wizard • Apply mApp Wizard 	
<p>Desktop Client Wizard Top Bar</p>	<p>CSM Desktop Client Wizard</p>	
<p>HTML Editor icon</p>	<p>HTML Editor</p>	
<p>Imports icon</p>	<p>Imports</p>	
<p>License Generator icon</p>	<p>License Generator Tool</p>	
<p>Server Config icon</p>	<p>Server Config Tool</p>	
<p>Server Manager icon</p>	<ul style="list-style-type: none"> • Server Manager • Server Configurations 	 
<p>System Restore icon</p>	<ul style="list-style-type: none"> • System Restore Tool • System Restore > Connection Wizard 	
<p>System Upgrade icon</p>	<p>System Upgrade Tool</p>	

	Locations	Images
Trebuchet Admin icon	Trebuchet Admin	
Trebuchet App icon	Trebuchet App	
Trebuchet Import Utility icon	Trebuchet Import Utility	
Trebuchet Server App icon	Trebuchet Server App	
Trebuchet 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.

KNOWLEDGE 10384 Created by Henri Bryce on 9/18/2019 at 5:55 PM
 Remove Network Access/Permissions

STATUS	PUBLISH DATE	REVIEW DATE	ASSIGNED TO
Draft	--	--	ITKM - IT

Next: [Technical Review](#) ITKM - IT

Overview Journals History Comments Problem

Article Type *
 How To

Service *
 Account Management

Category
 Network Access

Subcategory
 Remove Access/Permissions

Configuration Item Type
 Config - Server

Assigned Team
 ITKM - IT

Assigned To

Technical Review Team
 ITKM - IT

Format Review Team
 Formatting

Title *
 Remove Network Access/Permissions

Content *
 Remove network access/permissions for an individual user:
 1. Right click the folder you want to modify the **access permission** and choose "Properties".
 2. From the Security tab, click "Edit" button.
 3. Select the user and click the "**Remove**" button.

Visible on Customer Portal
 Make FAQ on Customer Portal

Source
 Cherwell Service Management

Tags
 network, server, access, permissions, remove, disable, stop

[Cancel](#) [Save](#)

Article Stats
 0 Likes
 0 Dislikes
 0 Usage Overall
 0 Used in Portal

Actions
[Assign to Me](#)
[Add Comment](#)
[Update/Revise Article](#)
[Set Review 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.

KNOWLEDGE 10186 Created by Cherwell Admin on 1/1/2019 at 2:38 PM
Last modified by Cherwell Admin on 9/9/2019 at 4:07 PM

UNABLE TO PRINT USING THE 'FIT TO PAGE' OPTION

STATUS	PUBLISH DATE	REVIEW DATE	ASSIGNED TO
Published	--	1/1/2020	

[Next: Retire This Article](#)

Article | Journals | History | Comments | Problem

UNABLE TO PRINT USING THE 'FIT TO PAGE' OPTION

If unable to print using the 'fit to page' option in MS Excel 2010:

Note: This problem may occur if you have a very big workbook you are trying to fit to a single page and print.

1. Check if it's possible to **spread your workbook over multiple pages** instead of trying to print everything on just one page.
2. Check that the **page is NOT zoomed to over 100%**.
3. Update your **printer drivers**.
 - a. Go to the **website of your printer manufacturer**.
 - b. Select your specific **printer model**.
 - c. Download any **new drivers** the manufacturer may have released.
 - d. Install the **new printer** on your system. Often this is simply clicking the .exe file you downloaded from the printer manufacturer.

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General

Classification

Configuration Item

Source
KnowledgeBrokers

Tags
UNABLE, PRINT, USING, FIT, PAGE, OPTION, EXCEL, 2010, NOTE, MAY, OCCUR, BIG, WORKBOOK, SINGLE, 1, CHECK, POSSIBLE, SPREAD, MULTIPLE, PAGES, INSTEAD, EVERYTHING, ONE, ZOOMED, 100, 3, UPDATE, PRINTER, DRIVERS, WEBSITE, MANUFACTURER, SELECT, SPECIFIC, MODEL, DOWNLOAD, NEW, RELEASED, INSTALL, SYSTEM, OFTEN, SIMPLY, CLICKING, EXE, FILE, DOWNLOADED, COPY

Was this Useful?

[Learn more...](#)

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/Statures 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.

[Learn more...](#)

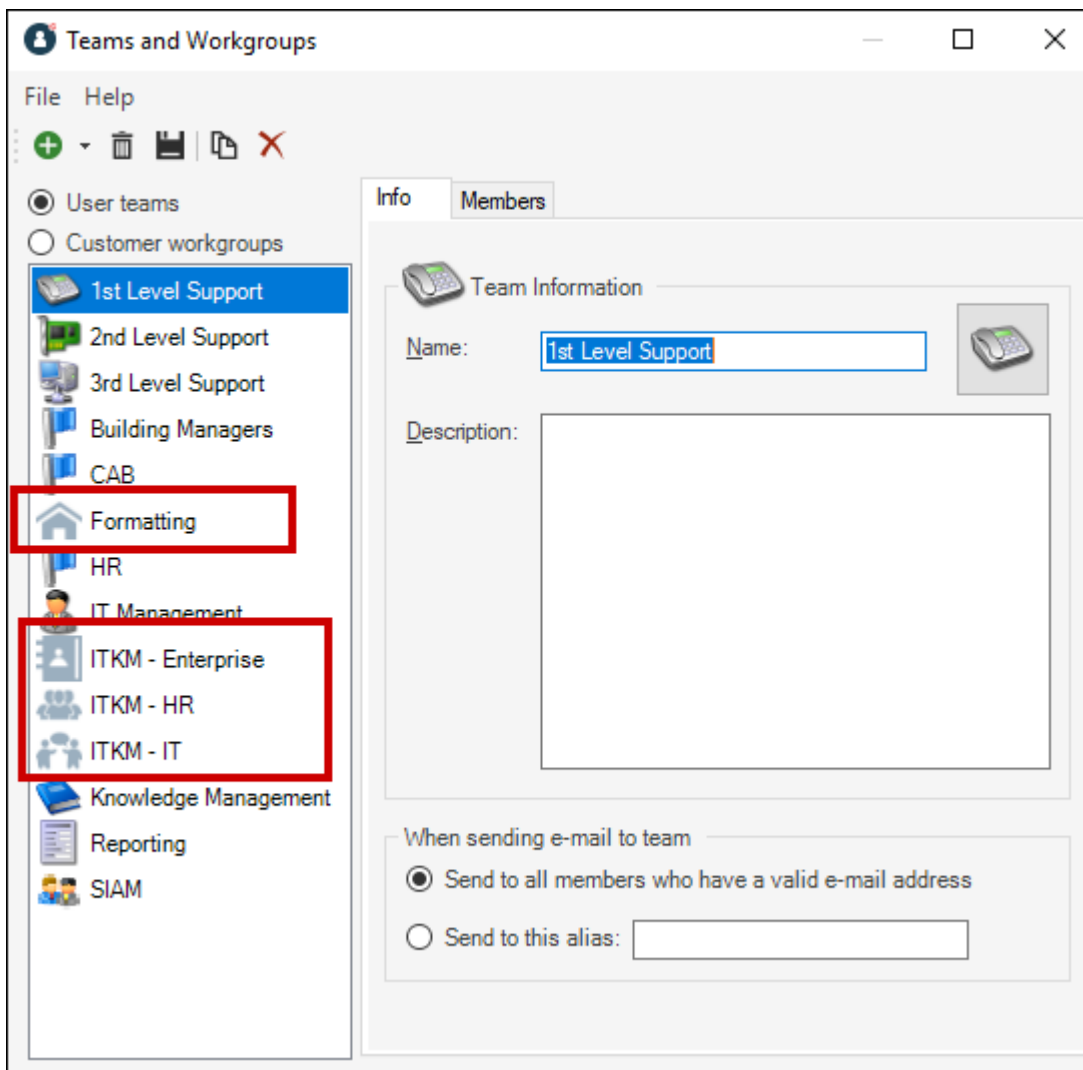
[Learn more...](#)

[Learn more...](#)

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**.

The screenshot shows the IT Knowledge Manager dashboard with the following sections:

- Articles used as Solutions in Portal:** 2
- Articles used as Solutions:** 2
- Articles with Likes:** 13
- Articles with Dislikes:** 0
- Published IT Knowledge Articles:**

Title	Used in Portal	Usage Overall
APPLY A COLOR EFFECT TO PICTURE OR VIDEO	1	1
PRINT NON-PRINTABLE DATA	1	1
ZOOM TO A PARTICULAR AREA		
INSERT PAGE NUMBERS IN A PDF FILE		
SECURE PDF FILES		
EXPORT IMAGES FROM PDF FILE		
COPY A PARTICULAR AREA OF A DOCUMENT		
APPLY PAGE TRANSITIONS		
UNABLE TO WORK WITH TRANSITIONS		
UNABLE TO WORK WITH TYPE WRITER TOOL		
- IT Articles Ready for Review:**

Review Date	Title	Article Type
9/17/2019	SET FORM FIELD NAVIGATION	How To
- Unpublished IT Knowledge Articles:**

Title	Domain	Owned By Team
RECOVER LOST CHANGES FROM AN UNEXPECTED S	Adobe Acrobat 9	Knowledge Mana
APPLY RULES TO RSS FEEDS	MS Outlook 2007	Knowledge Mana
Reset Password		2nd Level Support
How to upgrade Firefox		
- Unpublished IT Knowledge by Status:** A donut chart showing 2 Draft articles, 1 None article, and 1 Technical Review article.

[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.

The screenshot shows the Configuration Management Database (CMDB) interface for a computer named 'COMPUTER 4397'. The 'Installed Software' section is highlighted with a red box and contains the following information:

- Product:** Adobe Reader
- Present
- Vendor:** Adobe Systems Incorporated
- Version:** 9.1.0
- Install Date:** 10/2/2017

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.

The screenshot displays the Configuration Management Database (CMDB) interface. At the top, it shows the 'SERVER' details for a 'Mail Server' with a status of 'Down', manufacturer 'Dell', and IP address '10.10.1.25'. The primary user is 'Andrew Simms' and the assigned user is 'Andrew.Simms@RiverTCorp.com' with '3rd Level Support' assigned to it. The breadcrumb trail includes 'Overview', 'Trend Alerts (Current Alert Level: 0/1)', 'CI Events (70)', 'SLA', 'Baseline Changes', 'Journals', 'CI Users (1)', 'Incidents (4)', 'Problems (0)', 'Upstream CIs (1)', 'Downstream CIs (0)', 'Change Requests (1)', 'Other Configuration Items (1)', 'Installed Software (107)', 'Installed Services (148)', and 'Services (0)'. The 'Installed Services (148)' link is highlighted with a red box. Below the breadcrumb trail, the 'INSTALLED SERVICE' form is shown, also highlighted with a red border. The form contains the following fields and options:

- Display Name:
- Present
- Name:
- Service Status:

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.

INCIDENT 102373 Created by Andrew Simms on 8/26/2019 at 3:13 PM

STATUS: New RESPOND WITHIN: -- RESOLVE WITHIN: -- CUSTOMER: ASSIGNED TO:

Next: [Begin Work](#)

Overview Activity Journals Tasks (0) Related CIs (0) Related Problem

Call Source: Phone

Customer *

Description *

Additional Questions
No additional information for this request.

Requested By:

Columns Records 1 - 47 of 47 Page 1 of 1 All

SEARCH: CHANGED: Any time

FULL NA...	LAST NAME	FIRST NAME	EMPLOYEE ID	DEPARTMENT
John Allard	Allard	John	000019	Operations
Tracy E Aubin	Aubin	Tracy	000044	Operations
Henri Bryce	Bryce	Henri	000014	IT
Emma Carson	Carson	Emma	000047	IT

Actions

- [Assign to Me](#)
- [Escalate to Level 2](#)
- [Link to Existing Major Incident](#)
- [Submit to Knowledge Base](#)
- [Change to Major Incident](#)
- [Create a Problem](#)
- [Create Change Request](#)
- [View Impacted CIs](#)
- [Select Available SCT](#)
- [Track Time](#)
- [Add Requester](#)

[Learn more...](#)