



Cherwell® Service Management

CSM Release Notes

Version 9.1.0

April 2017

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About this Guide

This document provides changes made in Cherwell Service Management (CSM).

Product Release Information

| | |
|-------------------|--|
| Product: | Cherwell Service Management (CSM) |
| Release Version: | 9.1.0 |
| Release Date: | March 2017 |
| Customer Support: | For more information or support, please visit our website: www.cherwell.com or e-mail us at support@cherwell.com . |


System Requirements

Minimum System Requirements (Client)

| | |
|-------------------|--|
| System Processor: | Dual Core CPU or equivalent (1) |
| System Memory: | 3 GB (4 GB or more recommended) |
| Operating System: | Windows 10, Windows 8/8.1 x86 or x64 Pro or Enterprise editions, or Microsoft Windows 7 Service Pack 1 (SP1), x86 or x64 editions |
| Free Disk Space: | 1 GB |
| Networking: | Internet Access required for online documentation feature |
| Browser: | Internet Explorer 10+, Microsoft Edge (on Windows 10), Mozilla Firefox 27+, Safari 5.0+, Google™ Chrome™ 32+ (required for Browser applications) |
| Other: | Microsoft .NET 4.5.1+ |

Minimum System Requirements (Server)

| | |
|-------------------|---|
| System Processor: | Dual Core CPU or equivalent (1) |
| System Memory: | 4 GB (6 GB or more recommended). Note that if you have SQL Server® installed on the same server, more RAM is recommended. |
| Operating System: | Windows Server 2012 R2, Windows Server 2012, or Microsoft Windows Server 2008 R2 |
| Free Disk Space: | 1 GB |
| Networking: | Dual Core CPU or equivalent (1) Internet access required for online documentation feature |
| Database: | Microsoft SQL Server 2016, Microsoft SQL Server 2014, Microsoft SQL Server 2012, and Microsoft SQL Server 2008 R2. Database can be on a separate server. |

| | |
|--------|--|
| |  Note: Full-text indexing must be enabled. Requires SQL Standard Edition (minimum), either a Processor License or a Server License with sufficient number of Client Access licenses. |
| Other: | Microsoft .NET 4.5.2+ IIS 7.0+ (required for Web Applications and when hosting the Cherwell Application Server in IIS) (2) |

Other Requirements

| | |
|--------------------------------|---|
| Bomgar (Platform integration): | Versions 16.1.3, 15.2.1, or 15.1.4 |
| Bomgar mApp: | Refer to <i>Bomgar mApp documentation</i> . |
| E-mail: | Server running SMTP and POP or IMAP, Microsoft® Exchange 2016, Microsoft® Exchange 2013, and Microsoft® Exchange 2010 |
| LDAP: | Microsoft Active Directory® 2003+, Novell® eDirectory™. Other LDAP servers might allow some/all functionality. |
| Mobile Devices: | Cherwell Mobile 2.0 for iOS: iPhone®/iPad®/iPod Touch® (iOS 8.0+) Cherwell Mobile for Android: Android® 4.4+ |
| Trusted Agent Server (3): | Dual Core CPU or equivalent (1); 4 GB (6 GB or more recommended); 1 GB free disk space; Microsoft 2008 Server R2, Server 2012, Server 2012 R2 |
| Load Balancing (3) (4): | Redis® Server 2.8.x or Redis® Labs Enterprise Cluster (RLEC), any version. |

1. Recent model required.
2. If you host the Cherwell Application Server in IIS, Windows Communication Foundation (HTTP and Non-HTTP Activation) components are also required.
3. Optional. The Trusted Agent Server, Redis® Server, and Redis® Labs Enterprise Cluster are installed separately from the CSM server.
4. Testing was performed against open source Redis 2.8. No known compatibility issues exist with later Redis versions, however.

Upgrade Considerations

Upgrading should not cause issues or difficulties with your current system design. Please contact the Cherwell Support team with any system issues or concerns.

When upgrading to this version of CSM, consider the information in this section.

Database Upgrade

A database upgrade is necessary for this release. A prompt to update the database opens when selecting the Upgrade option in the installer or running the applications for the first time. This update is for internal system definitions and does not affect your current functionality or data. As with any upgrade or update to the database, please back up the database before running the update process.

Upgrading Remote Servers

If you install CSM server applications on remote servers, you must upgrade each server application when you upgrade CSM. This includes the:

- Scheduling Server
- Automation Process Server
- Trusted Agents Server
- Configuration Scheduling Server

Browser Cache for Web Applications

For best results, CSM Browser Client and Portal Users should clear their browser cache after each CSM upgrade.

Currency Formats in the CSM Desktop Client

CSM now respects the Windows Regional Settings for currency formats in the CSM Desktop Client. This may cause some changes in how currency values are shown; for example, negative currency values are now shown in parentheses on EN-US operating systems.

Widget Alignment in Web Applications

Due to defect fixes in CSM 8.2.1, you should review the alignment on text, button, image, and link Widgets in the CSM Browser Client and Portal after you upgrade to CSM 8.2.1 or later.

Deprecated Application Display Themes

To support the Desktop Client improvements made in CSM 8.00, all legacy application display themes have been deprecated. These include the Microsoft Office, Windows 7, and Windows 8 themes. The default application theme is now set to Cherwell Light for new and upgraded installations.

Cherwell Asset Management Manager Rights

Rights for OOTB Security Groups will be granted the following rights to Cherwell Asset Management, formerly known as Express Software Manager, after the upgrade to this version from a version earlier than CSM 8.00:

- Admin: All CAM rights.
- Anonymous Browser: No CAM rights.
- IT Service Desk groups: No CAM Administration rights; CAM Reports Application and CAM Purchasing Application allowed.
- Portal groups: No CAM rights.

If you modified these rights before the upgrade, review the rights after the upgrade and modify them as needed.

Pre-release Versions of CSM

If you have any previous Beta, Pre-Release, or Pre-General Availability (GA) versions, or a version with localized assemblies provided by a Cherwell Partner, you must uninstall them before installing the latest release. We recommend that you remove the folders (C:\Program Files (x86)\Cherwell Service Management and/or C:\Program Files (x86)\Cherwell Browser Applications). The System Upgrade utility must be manually re-run to make changes to internal definitions. We recommend installing in a test environment first, and perhaps installing the CSM Demo Database to get a feel for the new capabilities.

Authentication Handling for Legacy API

Beginning with CSM 8.1.0, authentication handling was modified in preparation for future scalability scenarios. This change impacts customers who have written code to connect to CSM using the legacy .NET-based Trebuchet API. (The preferred method for clients to connect to CSM is through the Cherwell REST API.)

If a legacy client is using the .NET-based Trebuchet API to directly connect to a CSM database, the following assemblies must be present in the execution directory in order to successfully login using CSM internal authentication: `Trebuchet.Services.dll`, `Trebuchet.Services.Authentication.dll`, `Trebuchet.Services.ComplianceLogging.dll`, `Trebuchet.Services.KeyManagement.dll`, `Trebuchet.Services.Data.dll`, `Trebuchet.Services.Messaging.dll`, `System.IdentityModel.Tokens.Jwt.dll`.

Upgrading from Versions Earlier than CSM 6.00

As transitional tools from Cherwell Service Management 4.00, CSM offered Legacy Browser Applications and Legacy Mode for Communications. If you are upgrading from a release before 6.00, these transitional tools are no longer available.

CSM 9.1.0 Enhancements List

- DR 28629 Cherwell REST API: Added operations for looking up a Business Object by its scan code.
- DR 29832 Cherwell REST API: Added an operation to create or update a Team or Workgroup.
- DR 31155, DR 32042 CSM Web Applications (Accessibility): Added screen reader support for elements on Grid Forms.
- DR 31323 CSM Web Applications (Accessibility): Added keyboard support for the Related Item Selector.
- DR 31337 CSM Web Applications (Accessibility): Added keyboard support for Quick Search results that contain multiple Business Objects.
- DR 33467 CSM Web Applications (Accessibility): Added keyboard support for major site-level elements.
- DR 35694 CSM Web Applications (Accessibility): Screen reader and keyboard support have been added to toolbars and the Related Item Selector for Form Grids.
- DR 35971 CSM Web Applications (Accessibility): Added keyboard and screen reader support for the toolbar on child Business Objects.
- DR 37708 CSM Web Applications (Accessibility): Added Grid support for applying focus to the Grid (ALT+W) and navigating through multiple pages (Page Up and Page Down).
- DR 37710 CSM Web Applications (Accessibility): Added tabbing capabilities for some prompts, such as the e-mail address book and One-Step prompts.
- DR 37917 CSM Web Applications (Accessibility): Added screen reader and keyboard support for the E-mail Message window toolbar.
- DR 37987, 37990 CSM Blueprints: To support concurrent development, Users can now view conflicts and choose whether to keep or discard Blueprint changes during publishing. In addition, Users can see when each item was edited and who made the changes.
- DR 38147 Cherwell REST API: Added support for HTML content in Business Object fields.
- DR 40218 CSM Modifiers: Added Modifiers for trimming start and end text for Text Expressions. Also added a Modulo type to Math Expressions so you can return the remainder of a division calculation.
- DR 40247 CSM Modifiers: Added Modifiers for applying cryptographic hashing algorithms to text strings. This enables you to create encrypted strings you can use to create tokens for APIs and to detect data changes.
- DR 40268 Cherwell REST API: Added operation to add users to a Team by batch.
- DR 41328 CSM Command Line: Removed nonexistent -w switch from Trebuchet.App.

CSM 9.1.0 Fixes List

- DR 16135 CSM Calendars: Capped Calendar appointments at 10,000 to prevent Calendars from not responding when too much data is returned.
- DR 16157 CSM Grids: CSM now respects the Windows Regional Settings for currency formats in the CSM Desktop Client. This change fixed an issue that caused an additional space to display for Currency Fields in Grids.
- DR 31052 CSM One-Steps: Fixed an issue that caused incorrect link formatting in e-mails originated from One-Steps. This problem occurred when the "[LINK]" method was used.
- DR 35372 CSM: General security fix.
- DR 35624 CSM Grids: Fixed an issue that caused Numeric Fields with a ShowBlank attribute to show 0 as a value rather than show a blank value.
- DR 36151 CSM Reports: Fixed an issue that caused an incorrect list of child items to be returned in a Report that uses a join table.
- DR 36563 CSM One-Steps: Fixed theming issues in the One-Step Editor.
- DR 37745 CSM: Fixed an issue that caused potential performance problems due to text parameters for a Unicode database that were not always specified as Unicode.
- DR 38672 CSM: General security fix.
- DR 38742 CSM Browser Client: Fixed an issue that caused an error when Users merged child records for a Relationship that has the Load Keys Only option set.
- DR 39060 CSM Dashboards: Fixed an issue that caused an error to occur when Users clicked a toolbar button but they did not have an object selected.
- DR 39286 Cherwell REST API: Fixed an issue that prevented users from getting a new access token if they were already logged in.
- DR 39365 Cherwell REST API: Fixed an issue that prevented the getbatchuser operation from returning records for Users who have a CSM login ID and a Windows login ID associated with their account.
- DR 39494 CSM Expressions: Fixed an issue that prevented Users from selecting condition options after they deleted an Advanced condition from an Expression clause.
- DR 39577 CSM Scheduler: Updated process terminations and fixed an issue where multiple scheduling jobs were incorrectly shown as running.
- DR 39592 CSM Desktop Client: Fixed an issue that caused the Desktop Client to fail when spell check was used with Rich Text Fields.
- DR 39846 CSM Browser Client (Accessibility): Fixed an issue that caused focus on the Related Item Selector to be lost after Users typed a few characters, then pressed the Tab key and selected an item from the pop-up window.
- DR 39917 Cherwell REST API: Fixed an issue that caused an object null reference error for the api/v1/getsearchresults operation.
- DR 40809 CSM: Changed the icon for the Action button to a Play arrow.
- DR 40047 CSM Blueprints: Fixed an issue where changing the size of a column used by an index caused an error during publish.
- DR 40099 CSM Modifiers: Fixed an issue that caused Expressions with Tokens to fail after a Modifier was removed.

- DR 40276 CSM Administrator: Fixed an issue that prevented the Relationship Properties dialog from being resized horizontally.
- DR 40810 CSM Item Managers: When a Manager dialog is opened from a selected Action, the Action is now highlighted in the Manager.
- DR 41011 CSM German: Corrected translations for the Requester Fields Tree Node Title and Owner Fields Tree Node Title in the Query Builder.
- DR 41238 CSM Authentication: Fixed an issue that caused an exception to occur when Users attempted to log in to the Browser Client and Mobile Clients. This problem occurred when Users did not have rights to view common fields of other Users.
- DR 41432 Cherwell REST API: Fixed an issue in the REST API Discovery tool (Swagger) that prevented passwords with special characters from working correctly.
- DR 41462 Cherwell REST API: Added final URI redirect posting of a form to have SAML work for CSM desktop clients and Web Applications.
- DR 41717 CSM Application Server: Added improved logging and exception handling
- DR 41866 CSM Authentication: Added two new SAML Security options to select the specific type of signing being used by the selected identity provider.