Cherwell

CHERWELL® SERVICE MANAGEMENT

Tour the Desktop Client

Desktop Client User Interface

Good to Know:

Each User has a personal, dynamic, and configurable interface that is controlled by login Role, security rights, and personal settings:

- Click **Tools>Options** to configure personal settings.
- Use the **View** menu to show/hide panes.
- Permanently pin or auto-hide a pane by clicking its **Pin** .
- Move a toolbar or pane by clicking-and-dragging its **Grab bar** .
- Create a personal toolbar by right-clicking any toolbar and selecting **Customize**.

1 Menu Bar

File	New, Save, Abandon, Delete, Print, E-Mail, E-Mail current customer, New Window, Logout, Close
Edit	Undo/Redo, Cut/Copy/Paste, Show Legal Values, Refresh, Zoom, Lock/User Locks
View	Task Pane, Knowledge, Navigation, Records
Searching	Search Manager, Quick search builder, Edit/Save current search
One-Step	One-Step™ Manager, Recent unassociated One-Steps
Customer	Contact Manager, Current Info/Configuration Items
Dashboards	Dashboard Manager, Edit Global IT Dashboard, Set Global IT dashboard as Default, Widget Manger, Metric Manager, Heads-up Display
Tools	CMDB, Queues, Knowledge, Reports, Calendars, Visualizations, Attachments, Automation Processes, Table Management, Options (Settings)
Help	Contents (Online help), Reload definitions, Current Field Info, Report Error, System Analyzer, About (software info)

2 Search Control

	Records to search (all records or a specific record type (ex: Incident))
Quick Search	Text to search for
Go	Run search
	Search options (ex: Filters, include related records/Attachments, sort order, etc.)

3 Toolbar

Back	Back/Forward
	Home (default Dashboard)
	Calendar (default)
New	New
	Save
	Abandon
	Cut
	Copy
	Paste
	Attach (file, image, etc.)
	Show Legal Values (lookup)
	Print
	Search

Record-specific

Unlocked	Lock Record
Locked by you	Unlock Record
Locked by henri	Record is locked by another User
	Show results
	Show current record
	Go to first record in set
	Go to previous record in set
	Go to next record in set
	Go to last record in set

4 Main Pane

Upon logging in, the Main Pane shows the Home Dashboard. Depending on CSM operation, the window can also show: Records, Search Results, Calendars, Contact Manager, CMDB, Table Management, etc.

5 Task Pane

Quick Search	Find all records of a specific type (ex: Incident), or records that contain a specific word/phrase
Common Tasks	Frequently performed CSM operations
Queues	Queues for the active record
Process & Terminology	Helpful text for the active record type
Customer Info	Customer information for the active record

6 Knowledge Pane

Quick Search	Text to search for
Go	Run knowledge search

Search Options

	Populate search field with text from the active record, either highlighted text or text from a designated field
	Populate search field with text from the active record, then immediately search
	Stop current search
	Search is based on the current record type.
	Search is a general Knowledge search.
	Search all words (AND)
	Search any of the words (OR)

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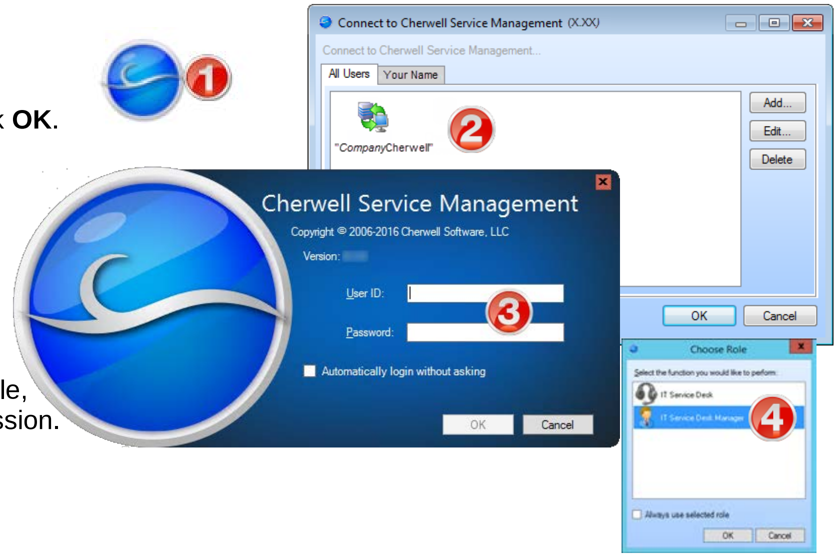
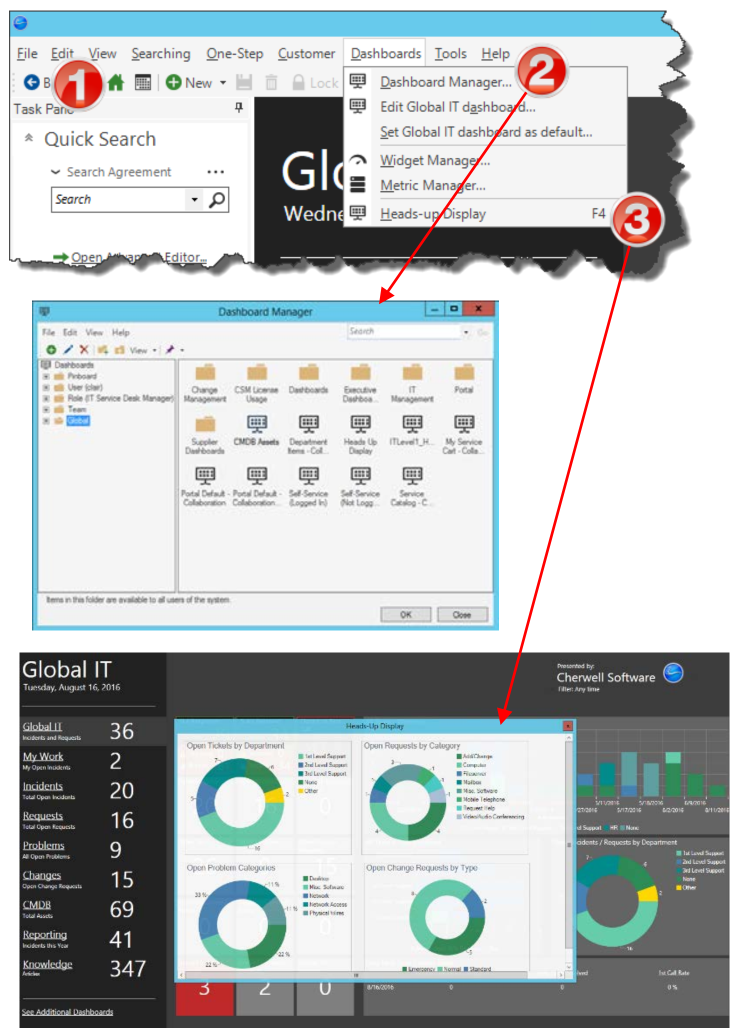
Log In



1. Double-click the blue **Cherwell Service Management** icon on your desktop.
2. Select a **database connection**, and then click **OK**.
3. Provide your CSM login credentials:
   a. User ID: Could be domain name/network Username or just Username.
   b. Password: Passwords are case-sensitive.
   c. Click **OK**.
4. If you are assigned to more than one CSM Role, you are prompted to select a Role for your session.

   You are connected to the CSM database. The CSM Main Window opens, displaying your personal interface (controlled by Role).

View Dashboards

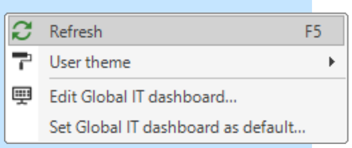


View a Dashboard several ways:

1. View your default Home Dashboard by clicking the **Home** button on the CSM toolbar.
2. View all your Dashboards using the Dashboard Manager.
3. View your default Heads-Up Display (HUD) by pressing **F4** on your keyboard.

Notes:

- Default Home and HUD Dashboards are initially selected in CSM Administrator. With security rights, you can select your own User default.
- Right-click a **Dashboard** to:
  - Refresh data.
  - Set a User Theme.
  - Edit the Dashboard.
  - Set the Dashboard as the default.



- Use the Dashboard Manager to create your own Dashboards. Use the Widget and Metric Managers to create Widgets and Metrics to support your Dashboard.

Tip:

- Create a custom User toolbar and include buttons for your favorite Dashboards (in a toolbar, **right-click>Customize>Add>Add Action)**.

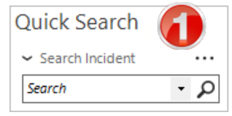
Tour the Desktop Client

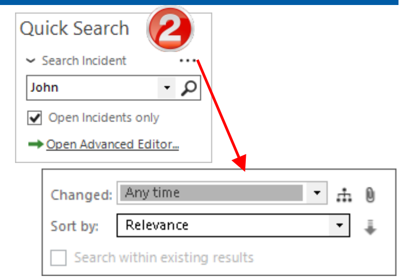
Search

Search for Records

Use the Task Pane to search for records:

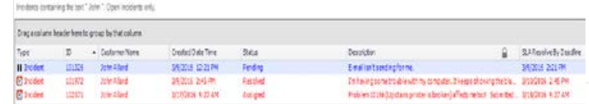
1. To find all records of a specific type (ex: All Incidents), select a **record type** (ex: Incident), leave the search words blank, and then click **Go**.
2. To find one or more records containing a specific word or phrase, select a **record type** (ex: Incident), type a **word** or **phrase** (ex: John), and then click **Go**.





Results List

Results Grid



Notes:

- Search Results are displayed in the CSM Main Pane, either as a List or Grid; Toggle between the views by clicking **View>Results in Grid**.
- Refine the search (ex: include child records, include Attachments, etc.) using search options (click **Quick search builder** [•••]).
- Searching is also available from the Search Control on the toolbar.
- Create saved (reusable) searches (Search Groups) using the Search Group Manager (**Searching>Search Manager**).

Search for Knowledge

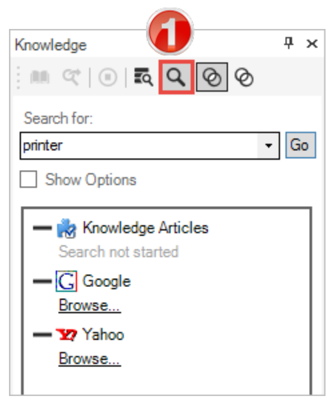
Use the Knowledge Pane to search your Knowledge Base:

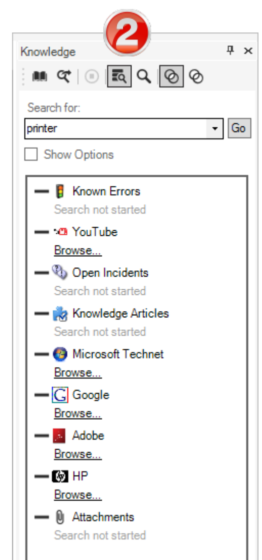
1. To find knowledge related to a general issue (ex: Printer), click the **General Knowledge** button, type a **word** or **phrase**, and then click **Go**.

   General Knowledge Sources are searched (ex: KAs, web, etc.).

2. To find knowledge relevant to the active record (ex: Printer Incidents), click the **Record Type** button, type a **word** or **phrase**, and then click **Go**.

   Record-specific Knowledge Sources are searched (ex: Other records (Incidents/Problems), hardware-specific websites, etc.).



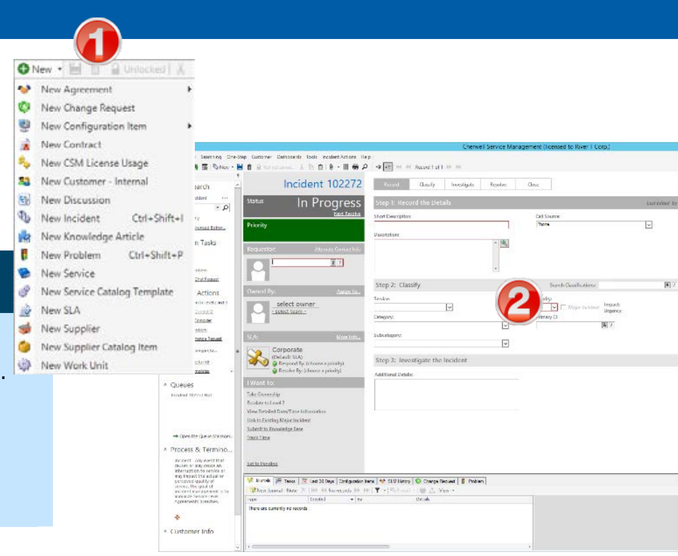


Log Records

1. Click **New>RecordType**.

   A blank record (form) appears in the CSM Main Window (forms are configurable and vary by record type).

2. Complete and save the record.



Tips:

- Record-specific buttons appear on the CSM toolbar.
- Record-specific Actions and information appear in the Task Pane.
- The active field is identified by a text cursor; press **TAB** to move between fields/buttons.
- Required fields are identified by a red border.
- Click **F3** to display legal values in a lookup field.

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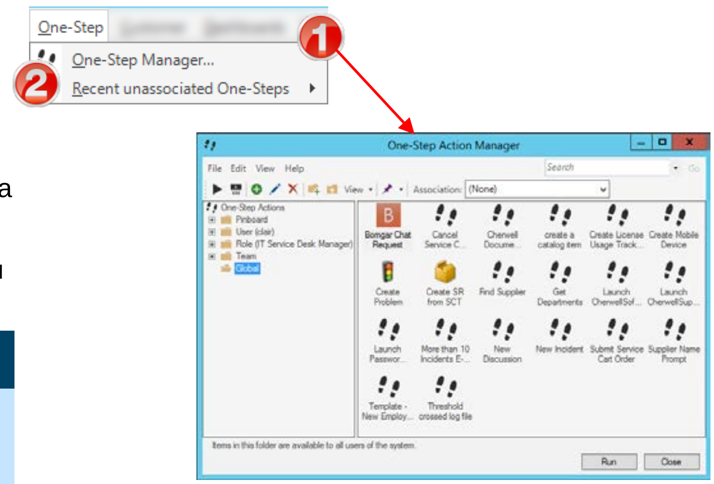
Run One-Steps

A One-Step is an entity that initiates one or more defined Actions (ex: Create an Incident record). Run a One-Step several ways:

1. View and run One-Steps using the One-Step Manager.
2. Run a Most Recently Used (MRU) One-Step by clicking a One-Step in the MRU list.
3. Create a One-Step to automatically run, or run when you click a button or link in the UI (ex: Next Status).

Notes:

- A One-Step can be simple (one Action) or complex (multiple Actions that run under conditional circumstances).
- Use the One-Step Manager to create your own One-Steps.



Run Reports

Run a Report (.rpt) several ways:

1. View and run Reports using the Report Manager.
2. Run an MRU Report by clicking a Report in the MRU list.
3. Create a One-Step/Action to run a Report (either automatically, or when you click a button or link in the UI).

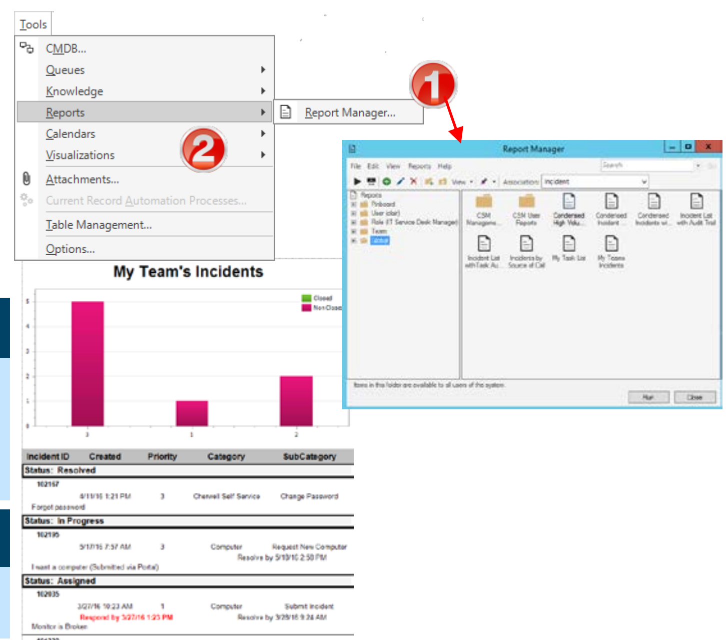
   The Report opens in the CSM Main Window.

Tip: Create Ad-Hoc Reports

- Use search queries to find all records meeting a defined criteria (ex: All P1 Incidents).
- Use Visualizations to view, print, or export Reports.
- Use Dashboard Widgets to run Reports.

Notes:

- Use the Report Wizard, the Report Designer, and the Report Writer to create your own Reports.



Keyboard Shortcuts

Key	Action	Key	Action
F1	Help	CTRL+C	Copy
F2	Rename current item	CTRL+S	Save
F3	Show the legal values for a Field	CTRL+V	Paste
F4	Heads Up Display	ALT+DOWN ARROW	Drop down a combo-box/move down in a list of records
F5	Refresh	ALT+LEFT/RIGHT ARROW	Move back to previous location/Move forward
F6	Displays the current User's information	ALT+F1–F8	Select tab in the current Form Arrangement
F7	Displays the current User's configuration items	CTRL+F4	Go to Home Page
F8	Zooms the current Field (if a large text Field)	CTRL+SCROLL	Zoom in/out in Editors
F10	Select Menu	CTRL+SHIFT+E	Email current Customer

For more information, see the online help.