Charles Sturt University

Cherwell Introductory User Guide

Division of Information Technology
Charles Sturt University

Introduction

Cherwell Service Management (also known as CSM or Cherwell) is an IT Service Management (ITSM) tool used at Charles Sturt University. It was introduced in November 2017 to replace the ageing LANDesk software. Cherwell delivers incident, change, knowledge and problem management services as well as an online Self Service Portal (Staff Service Centre).

This user guide covers terminology, dashboards and key functions as well as providing instructions for logging incidents and requests in Cherwell.

Contents

Getting Started

You will need to get access to Cherwell as a User (analyst) before you can install the software. To request access, please contact the IT Service Desk.

Terminology

- Browser Client - provides core service management features with task pane, knowledge article and search pane, but not all of the same level as the Desktop Client. Please note this option should be selected for any users working on an Apple Mac using Firefox and Chrome only
- **Business Object** – the “container” in which you are working in (Incident, Change, Problem, etc.)
- Desktop Client – software installed on a computer to access Cherwell, also known as the Rich Client or Blue Pill. The Desktop Client can be installed from the Install software icon on your desktop, titled Cherwell Service Manager (this is currently only available on the Windows platform)

- **Incident** - unplanned interruption to a service or a reduction in the quality of a service (for example: something is not working)
- **Service Level Agreement (SLA) -** agreement between the IT Service Desk and customers that defines response/resolve target times for a service.
- **Service Request** - request for information, advice, a standard change or access to a Service (for example: installation of new software)
- **Staff Service Centre (formerly Self-Service Portal)** – for customer access and provides limited functions to search knowledge, log incidents and requests, and manage logged jobs
- **User (formerly Analyst)** – staff with full Cherwell licences. Can access desktop and browser clients as well as the Staff Service Centre. Able to log in and use Cherwell to manage service desk data
- **Widget** – numeric value on dashboard displays
- **Self-Service Portal Client/Customer** – staff without Staff Service Centre licences. Can access data and perform self-service activities using the Self-Service Portal only

Licensing

Licensing controls how many users can log into Cherwell. Cherwell uses a concurrent licensing model with a fixed number of licences shared among a group of users and a fixed number of people being able to simultaneously access the product.

Charles Sturt University has selected the number of licences based upon analysis and engagement with other Australian Universities and Government departments who are using Cherwell. The Division of Information Technology (DIT) will be closely monitoring licence utilisation and can rapidly adjust and scale as required.

***NOTE**: If a user forgets to log out, the system auto-releases the licence after 20 minutes. **Cherwell will not autosave your information when it releases a licence**.*

User Interface Overview

The following section provides a basic overview of Cherwell – Desktop and Browser Clients.

Dashboards

- The dashboard relevant to your role is displayed by default when you log into Cherwell
- There are a number of pre-created dashboards you can view depending on what you need to see
- Dashboards display a variety of information that is designed to help you locate and monitor information quickly. They contain widgets that can display a website, chart, command, gauge, matrix, search result, twitter feed or RSS field based on specific criteria
- The widgets on the dashboard can be configured. For example: you can drill down into the individual records by double-clicking on a section of a chart or search result
- By double-clicking on any of the numbers in the grey and red boxes, it opens a larger screen to see the tickets listed. The grey boxes may change to red or another colour (as configured) when a certain number is reached to highlight action required
- An incident/request can be resolved or assigned to you or another individual

Dashboard Example – My Team

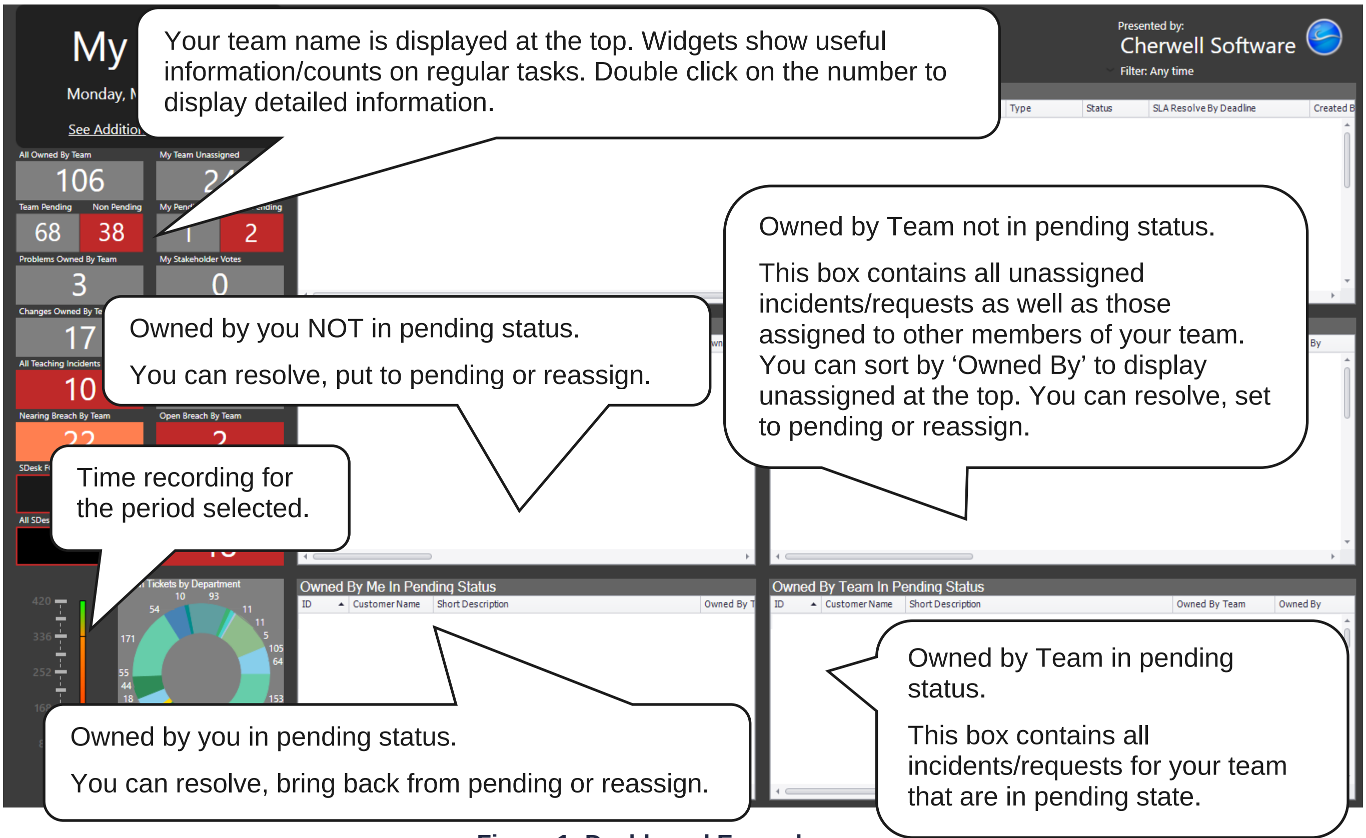


Figure 1: Dashboard Example

Accessing other Dashboards

To access other dashboards, from the Desktop Client:

- Go to the **Menu Bar**
- Click **Dashboards**
- Select **Dashboard Manager**
- Navigate to the **Global** > **Dashboards** > **Default Dashboards** folder
- Double click to display Dashboard

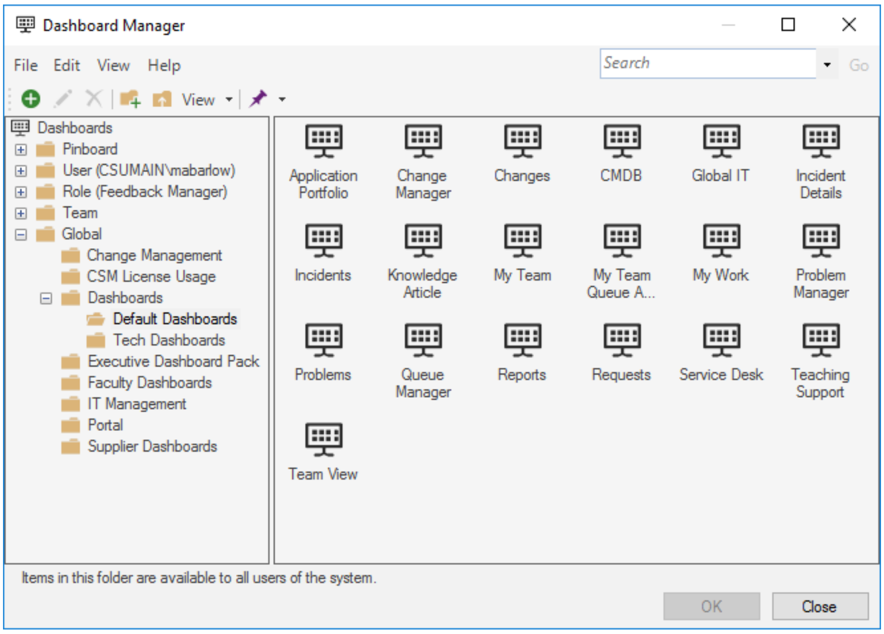


Figure 2: Access Dashboards

Pinning Dashboards

Users can pin their dashboards as a favourite. To **pin** a dashboard:

- Right-click and select **Pinning**
- Select 'Pin for user (CSUMAIN\username)'

To **view** a pinned dashboard:

- Go to the **Menu Bar**
- Click **Dashboards**
- At the end of the column displayed, the pinned dashboards will be available

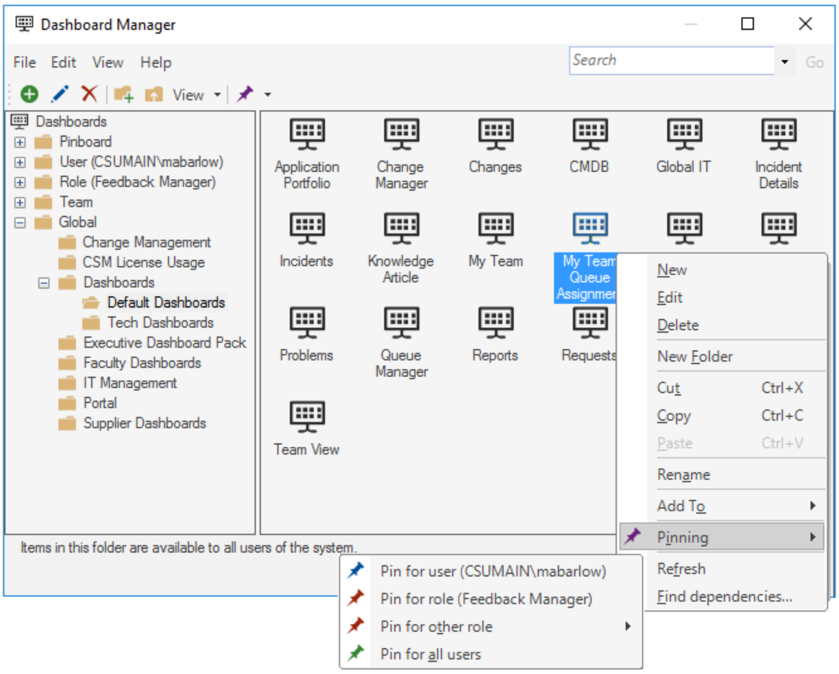


Figure 3: Pin Dashboards

Menu Bar

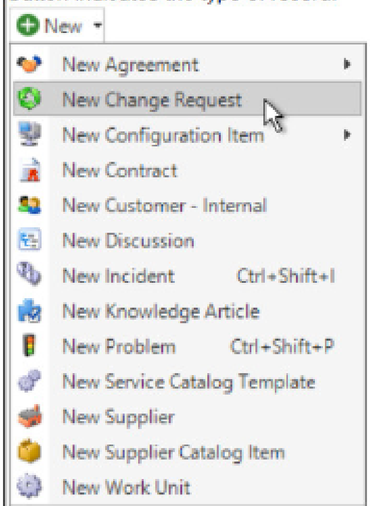
The menu bar remains constant across all screens and contains options for performing various actions in the system. The options that are active will depend on what you are doing in the system.

Figure 4: Menu Bar

Toolbar

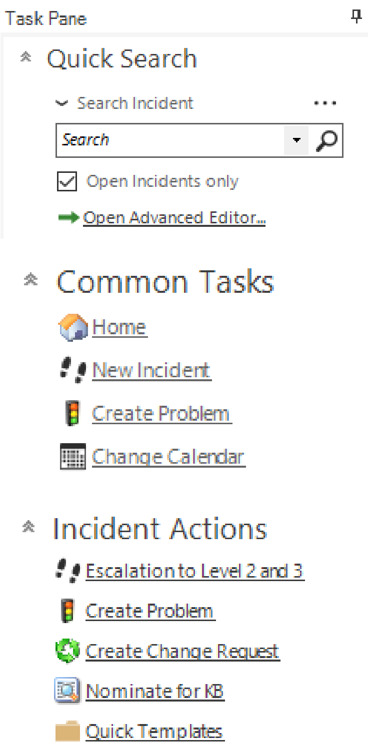
The toolbar contains options for performing various actions in the system. This dynamically updates depending which area you are currently working in.

Figure 5: Toolbar

Button	Action	Description
Back	**Back/Forward**	Navigates backward or forward in the content pane sequence.
	Home	Displays the CSM Home page with the default Dashboard active.
	Calendar	Displays the default Calendar.
New	**New**	Displays item options (you choose the type). The icon on the button indicates the type of record. 
	Show results	Displays a set of records meeting a specific criteria.
	Show current record	Displays the currently selected record.
	Go to first record	Jumps to the first record in set.
	Go to previous record	Jumps to the previous record in set.
	Go to next record	Jumps to the next record in set.
	Go to last record	Jumps to the last record in the set.

	Save	Saves changes in the active window.
	Abandon	Abandons changes to the current item.
Unlocked Locked by you Locked by henri	**Lock Record** **Unlock Record** **Record is locked by another User**	Locks the active record. Unlocks the active record. Record is locked by another User. **Note:** This button toggles depending on the current status of the active record and who has the record locked. This button appears only if record locking is enabled and only when a record is active in the CSM Main Window.
	Cut	Moves the selected item to the clipboard, so you can then paste the item into a new location.
	Copy	Creates a new item whose properties are the same as the copied item. The new item can then be named and customized.
	Paste	Inserts an item from the clipboard to a new location.
	Attach	Attaches a file, Web page, image or shortcut. Also, has an option for displaying/hiding the Attachment Bar.
	Show Legal Values (Lookup)	Displays a list of legal values (for lookup fields only).
	Print	Prints the active pane.
	Search Manager	Opens the Search Group Manager, where you can run and manage saved searches (Search Groups).

Task Pane



Quick Search

Simple query that locates and displays a record or list of records based on a word or phrase.

Common Tasks

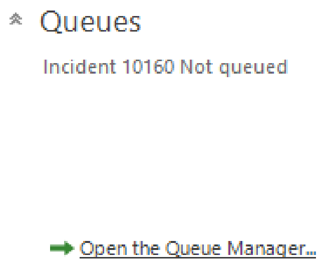
Consist of things you may frequently do.

[Business Object] Actions

This area will change based on the business object you are working with. It will consist of actions related to the business object you frequently access.

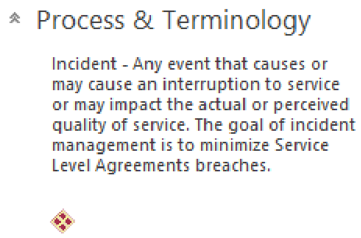
Queues

List any queues associated with the business object you have selected.



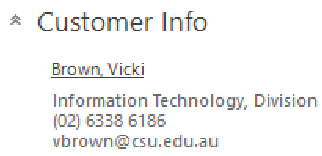
Process and Terminology

The text that appears will depend on the field on a form or the business object you have selected. For example: if you are viewing an incident, the “Incident” definition would appear.



Customer Info

If you are in a business object that allows you to select a customer (e.g. incident) then a mini summary for that customer will appear.



Figures 6 - 8: Task Pane breakdown

Incident Management and Service Request Processing

Incident management is the process responsible for managing the lifecycle of all incidents. The key aim of incident management is to ensure that normal service operation is restored as quickly as possible.

Service request fulfillment is the process responsible for managing all service requests. A service request is a formal request from a user for something to be provided. For example: requests to provide information or advice, reset a password or install a workstation for a user.

Cherwell stores both incidents and service requests in the incident business object.

Create Incident

The most common way to create a new incident is to select '**New Incident'** from the **New** button on the **Main Toolbar.**

Creating a new incident will automatically generate a unique incident ID number.

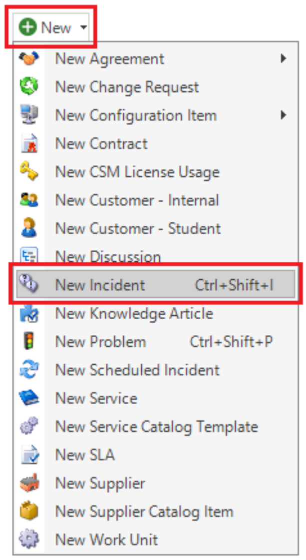


Figure 9: New Record Drop-Down Menu

***NOTE**: At the top of the incident is a visual representation of the various stages/phases involved in the incident and service request fulfilment process. As you move through the various statuses, the status will adjust according to how each phase is linked.*

Figure 10: Process Steps

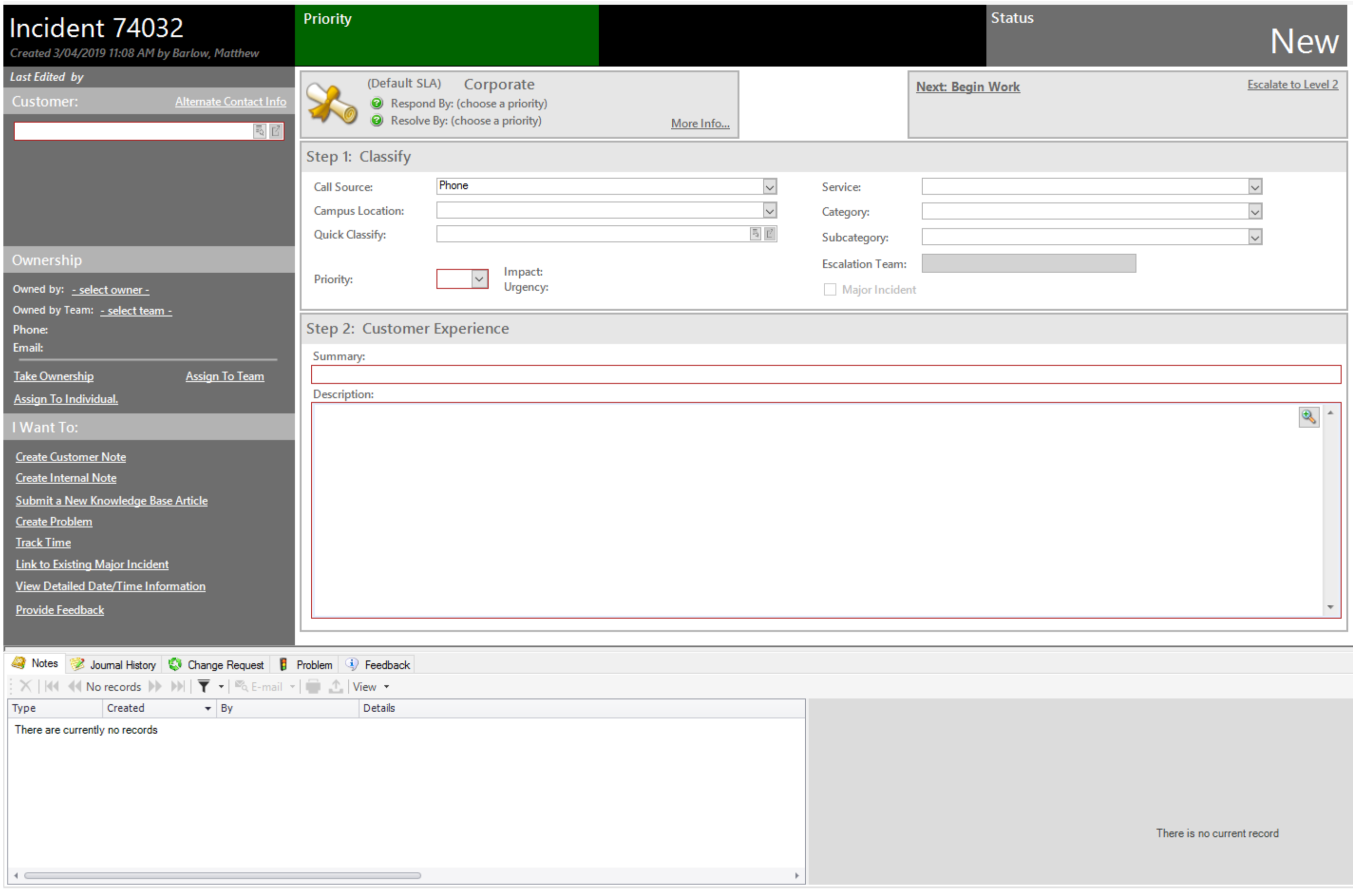


Figure 11: Incident and Service Request Form

Incident and Service Request Forms

- **Quick Info Tile:** on the left-hand side - displays important at-a-glance information, such as incident ID, requestor contact information, record ownership, SLA information and common operations ('I Want To:')
- **Workflow Bar:** on the top right-hand side - tracks the incident as it progresses through the Incident/Request Workflow
- **The Main Pane:** middle of the screen - displays the form fields, organised by **Record**, **Classify** and **Customer Experience** steps.
- **The Arrangement:** bottom of the screen - dynamically displays linked records (child records) that are in a relationship with the parent incident record, for example: notes; journals; customer's open, resolved and closed incidents/service requests. Tabs depend on the relationships that are set up in the system, for example: an incident may have a tab called Journals. Each tab has its own toolbar and the buttons available vary.

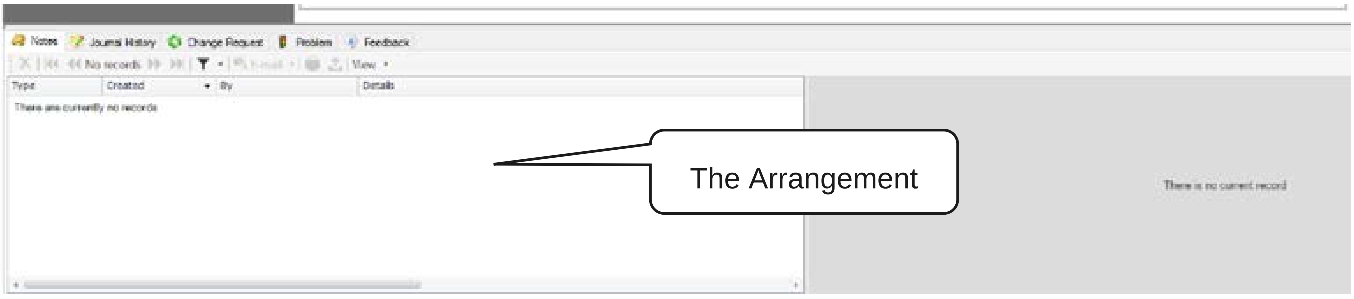


Figure 12: Arrangements

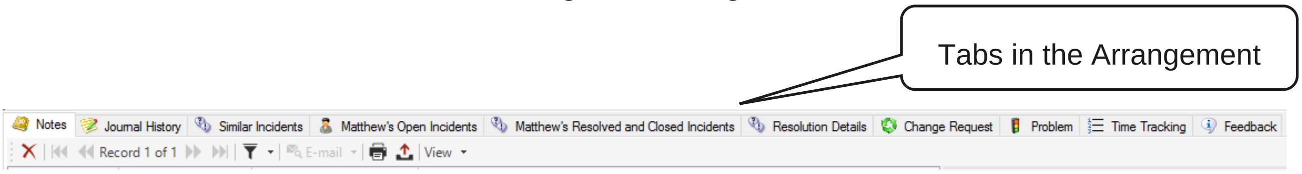


Figure 13: Arrangements Menu

Button	Action	Description
	Link	Adds/links additional items.
	Unlink	Unlinks the selected item.
	Go To (Quick View)	Goes to the source record.
	Save	Saves changes in the active window.
	Quick View	Opens the item in a second window so you can take a quick look at the details.
	Go to first record	Jumps to the first record in the set.
	Go to previous record	Jumps to the previous record in the set.
	Go to next record	Jumps to the next record in the set.
	Go to last record	Jumps to the last record in the set.
	Filter	Filter items in the Grid.
	Print	Prints the active Grid.
	Export	Export Grid to a file.
View	**View**	Displays items as: ▪ Form ▪ Grid ▪ Split screen (both Form and Grid): horizontal or vertical.

Figure 14: Arrangements Toolbar

Step 1: Classify

1. Enter a customer name in the **Customer** box and then press Enter. If there is an exact match, the customer information will be auto-populated. If there are multiple matches, the **Contact Manager** will appear and the user can select the appropriate record

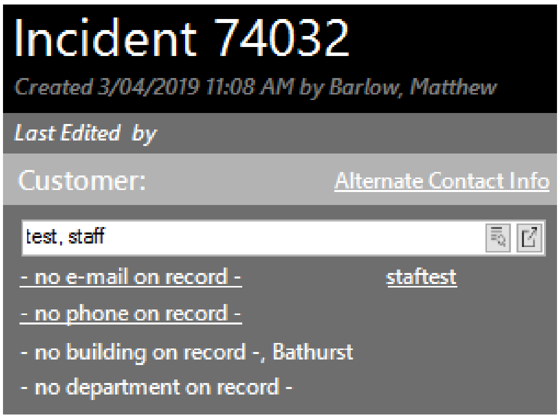


Figure 15. Requestor Field

***NOTE**: The user can also use wildcards like % or * to use with partial information when searching for customers, or click on the icon to show the Contact Manager*

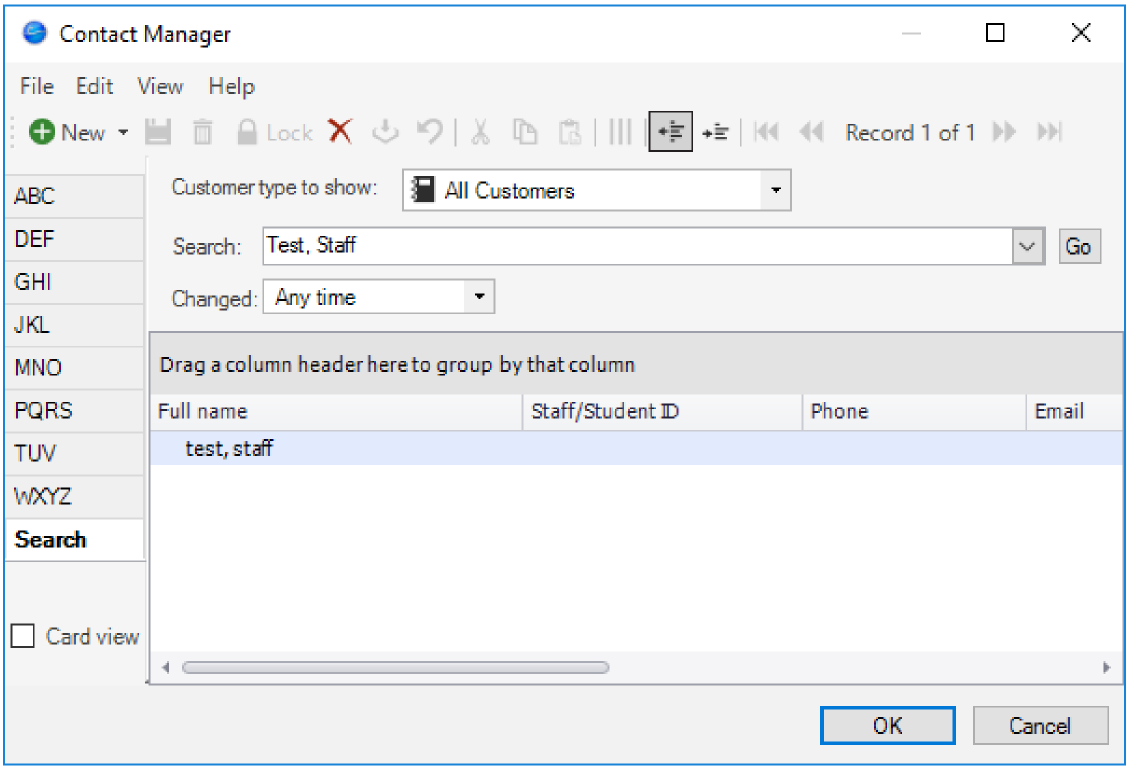


Figure 16: Contact Manager

HANDY HINT: When clicking the Go To button, this will display a quick view of the customer record. This includes related information such as incidents, configuration items, and customer surveys for that customer. It does not close the current incident.

It is always a good idea to verify that there isn't already an open incident record for the customer for the same issue before proceeding.

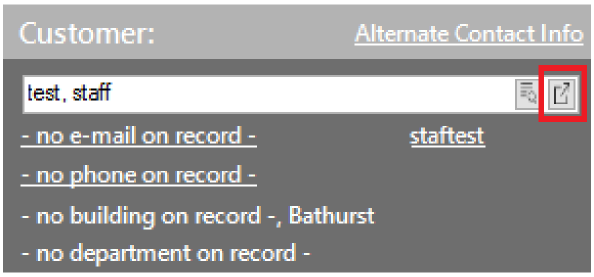


Figure 17: Requestor Tile

2. Select the **Call Source** – how has the customer contacted us?
3. Select the **Campus Location** - location of the incident, not the home base of the individual. The home base of the individual is located under the customer's name
4. Select or enter a keyword within the **Quick Classify** field and then press **enter**

QUICK CLASSIFY EXPLAINED

Incident type is determined by the **Service, Category, and Subcategory** selections.

This three-tiered categorisation determines the incident type (incident or service request), which specific form to display and which SLA to invoke.

If the user does not know the three-tiered classification, enter a word into the **Quick Classify** field (example: print) then press **enter** to locate a possible match. If matches are found, the **Category Selector** opens.

After an incident is identified as an incident or service request, the relevant specific form is displayed.

You are able to manually choose Service, Category and Subcategory - however we recommend using Quick Classify.

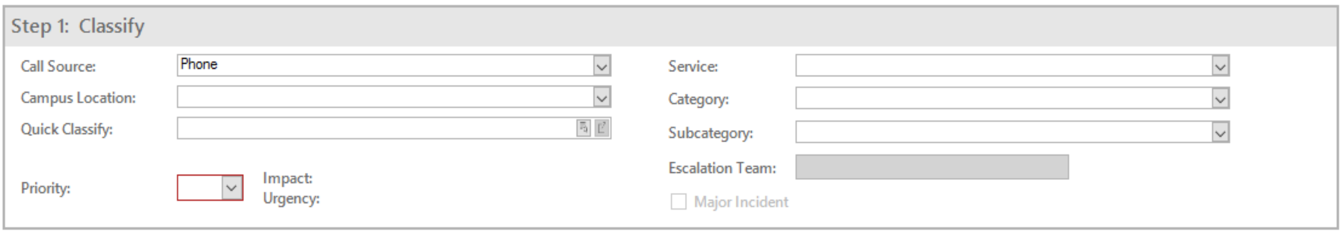


Figure 18: Classify Information

VIEW RELATED KB ARTICLES (THE BLUE BOOK) 

When a category has been populated, users can click on the **View Related KB Articles**. Knowledge will be searched and populated on the right-hand side with results. Users can select the **Show Options** so specific content displays with results appearing below.

5. Click on the **Priority** drop-down and select a priority number from the **Priority Matrix** that is most suited to the impact and urgency the customer is experiencing

Impact:
Urgency:

Urgency		Impact		
		Stops Work	Work Around	Low Impact
	Teaching/CSU Wide	1	1	2
	Entire Service/Location	1	3	4
	Individual	2	4	5

Impact:
Urgency:

Urgency		Impact
		Action
	Must Have	1
	Should Have	2
	Whenever Possible	3

Figure 19: Priority

MAJOR INCIDENT

A priority is required to be set for each logged incident and is entered using the **Priority – Impact / Urgency Matrix**.

If a priority 1 is selected, the **Major Incident** checkbox becomes available. Users can flag a priority 1 incident as a major incident. From there, Queue Managers can attach children incidents to the major incident making it easier to handle disruptions.

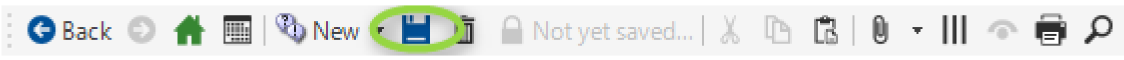
Each team has their own processes for addressing major incidents.

Step 2: Customer Experience

1. Enter a **Summary** and **Description** of the issue or request**.** Click on the zoom  icon to invoke the rich text editor should you need to, particularly if you need to include a screenshot.
   - Enter a meaningful **Summary**
   - Enter a meaningful **Description**

Figure 20: Step 2 Section of Incident Form

2. Click **Save**.



NOTE: Certain fields in the incident record are available for customers to view via the Staff Service Centre so always ensure that information entered is kept professional.

- The **Service, Category and Subcategory** drop-down lists are populated from the service catalogue
- **Quick Classify** gives you the entire service catalogue so you can select the service, category and subcategory from a grid rather than the drop-down lists
- The subcategory request type selected will automatically determine if the record is an incident or service request and update the field at the top of the record accordingly

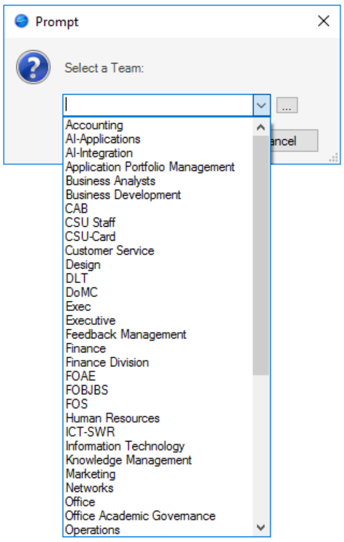
Charles Sturt University defines the severity matrix. The matrix is different for incidents and service requests. The assigned severity will impact the related SLA. Assigning the severity will update the **Respond By/Resolve By** times in the SLA box.

Figure 21. SLA Tile

Step 3: Incident Handling

Determine if the record will be owned by you or assigned to a different individual or team.

1. Click **Take Ownership** if you wish to assign it to yourself. This will update the **Owned By** and **Owned By Team** fields on the incident record



2. To assign the ticket to a different owner, click **select owner** to select the owner you wish to assign the ticket to. You must select the team first in order to see the users associated with that team
3. To assign the ticket to a different team, click **select team** and choose the team from the drop-down list

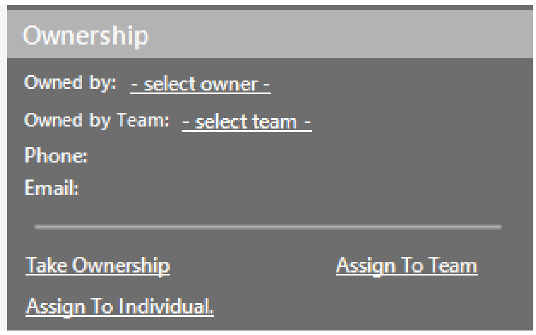


Figure 22: Actions Tile

4. To assign the ticket to a different team, click **select team** and choose the team from the drop-down list. At this point, the Status of the record is set to **Assigned**

Figure 23: Assigned Status

ESCALATE TO LEVEL 2

Located top-right of screen, **Escalate to Level 2** is the way in which the categories are defined.

The Service Desk is the first level of support and the service owners are level 2.

Throughout the lifecycle of an incident or request, users can escalate to level 2 only once. If users try to escalate a second time, they will get a message to say this has already been escalated. If there is a requirement to escalate an incident or request to another team, use the **Assign to Individual** or **Assign to Team** functionality.

5. Once you are ready to begin working on the record, click the **Begin Work** link. This will automatically update the status field and determine if you have met the **Respond By** target for the SLA

Figure 24: Begin Work

Figure 25: SLA Information

6. To set the status to Pending, click **Set to Pending** in the incident status tile area. You will be prompted to select a **Pending Reason**. The Pending Review date will be automatically set for one week from the current date

Figure 26: Set to Pending

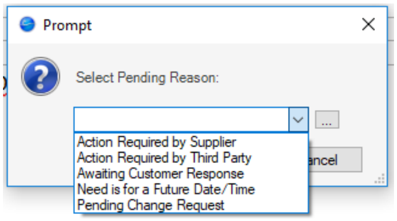


Figure 27: Pending Reason

7. To change the status back to **In Progress**, click the **Next: Remove Pending Status link**

Figure 28: Remove Pending Status

8. Once you are ready to resolve the incident, click **Next: Resolve**. You will be prompted to enter this in the **Close Description** box. Once entered, click **OK**

Figure 29: Resolve

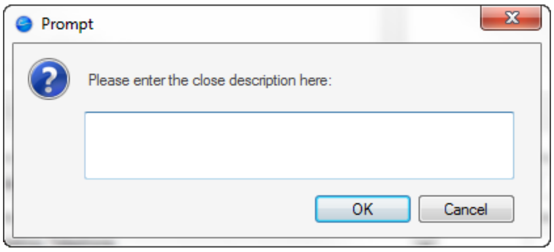


Figure 30: Close Description Tile

9. You will be prompted to select a **Cause Code**. Once selected click **OK**

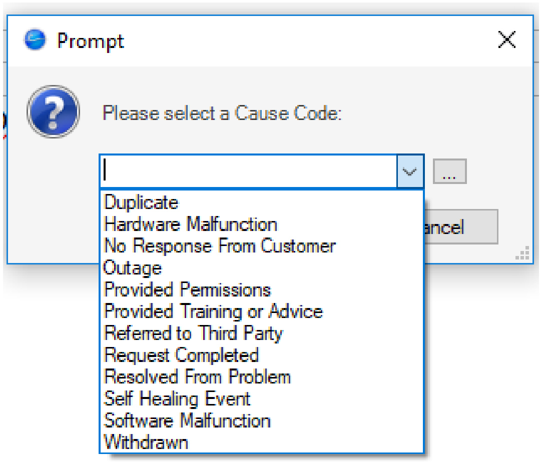


Figure 31: Cause Code Prompt

10. You will be prompted to enter how much time was spent in hours and minutes. Enter this information and click **OK**

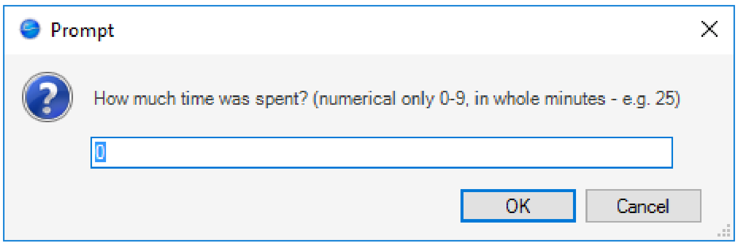


Figure 32: Time Spent

The incident or service request will automatically resolve and return the user to the home dashboard.

Figure 33: Resolved

The final state of the ticket will be set automatically to **Closed** by the system **3 days** after the date the ticket was resolved.

The customer may reopen the ticket using the email received when the ticket was resolved.

You may reopen the ticket using the **Next: Reopen Incident** if required.

Updating Incidents

While working on an incident or service request, you may need to add additional information. There are various options for updating incidents to capture additional information.

Journals

Appear as a tab at the bottom of the record. An excellent way to keep track of what has occurred during the lifecycle of the record. Contains historical information such as field changes, SLA history, queue history, mail history, customer requests and notes.

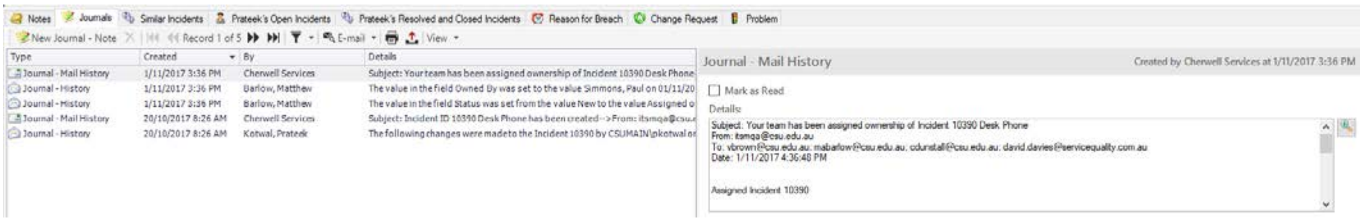


Figure 34: Journals Tab

1. Select the journal tab and click **New Journal – Note**

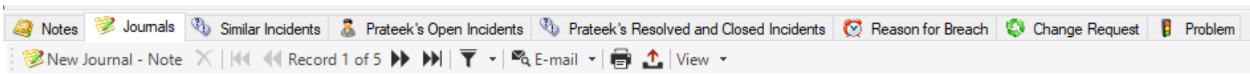


Figure 35: Journals Tab: New Journal – Note Button

2. Enter a note, click the **Save** button on the main toolbar of the record. By default, **Visible in Customer Portal** is selected. If you do not wish this entry to be visible to the customer from the portal, then you can uncheck this box.

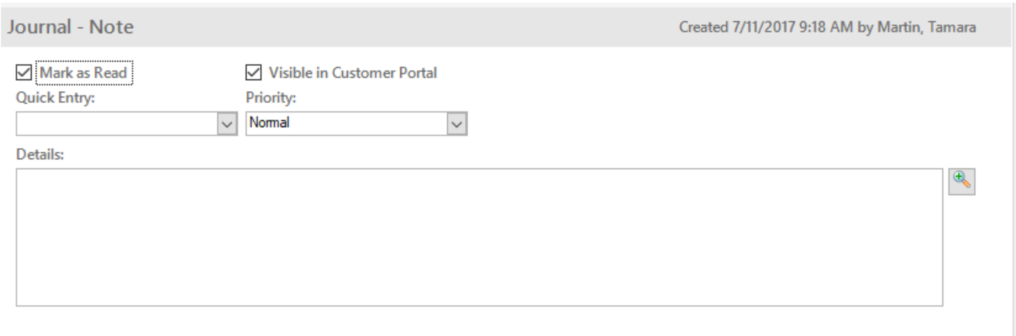


Figure 36: New Journal Note

Attachments

Users can add attachments (web pages, links or files) to a record.

1. Using the attachment bar at the top of the record. A user can click on the **paperclip**,  and click on the specific attach action, as per below:

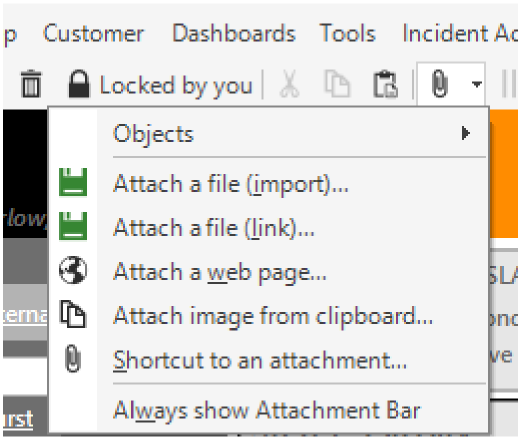


Figure 37: Always Show Attachment Bar Option

In the below example, we have selected **Attach a file (import)…**

2. Browse the location of the file, select file and click **Open**. The attachment will now appear in the **Attachment Bar**

Figure 38: Attachment

3. Click the **Save** button on the main toolbar of the record

Email

You can e-mail a customer directly from the system. This information will be captured in the journal tab for the record as a **Journal – Mail History** item.

1. Click on the **File** menu
2. Select **E-mail current customer…** the customer's e-mail address will be auto-populated

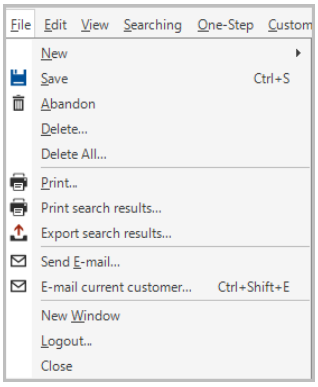


Figure 39: E-Mail Current Customer

3. Type in a **subject** and **body** for the email
4. Uncheck **Attach to recipients**
5. Click **Send**. The system will auto-generate an email record in the **Journals** tab

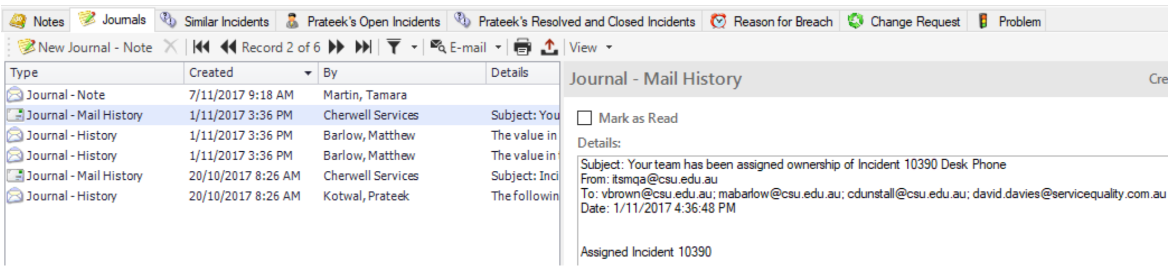


Figure 40: Email Record in Journals Tab

Further Assistance

Contact the [IT Service Desk]() for further assistance if required.