

REVIEW: Cherwell

Change, Configuration & Release Review

By Rebecca Beach

Cherwell Service Management® (hereafter referred to as “CSM”) is a tool that is a relatively straightforward to use. This is not because there is only one way to achieve a particular outcome but rather that there are many ways to achieve the same goal – with the ability to choose the one that better suits your style of working, rather than having to tailor around the tool.

Cherwell admits that previously it has tried to be “everything to everyone” but that it is now working to better provide for its target audience. With Change, Configuration and Release Management generally being somewhat “hit and miss” amongst vendors, CSM is a well-rounded tool that manages to be both straightforward and robust enough for all but the most complicated of change and release processes.

In ITSM Review’s opinion, CSM would be suitable for all types and sizes of organisations, except for those that already have a heavy and complex release management process in place. Whilst we believe that it is possible to successfully configure CSM to meet more complex release needs (such as these), given the time, energy and expertise required to do so, it is likely that that an alternative tool would be a better fit for your organization.

For the vast majority of organisations, we believe that CSM has all the functionality required to compliment your change, release and configuration processes to operate an efficient and successful management service.

In our opinion, CSM looks marginally older fashioned than its rivals in this group test, but what it lacks in style, it makes up for in operation. Easy to navigate, with all the functionality that anyone other than the most demanding release connoisseur could ever need, we see this tool as being a welcome addition to many IT organisations.

General

Release and changes are both created from within the change area of the tool. Although CSM change management has solid out-of-the box functionality, which is easy to implement and is suitable for any organisation, release management almost always needs configuration by the customer.

This having been said, CSM states that it prides itself on being highly configurable without requiring scripting know-how, and we can see how with a little time and perseverance even someone brand new to the tool, like ITSM Review for example, could create a perfectly adequate, although basic, release management process with CSM. However, if your existing release management mechanism is complex and entrenched then implementation will require a little more time and experience to ensure success.

Change

Changes are broken down into three types;

- Emergency
- Standard (repeatable)
- Normal

Each change type has its own thread to follow and contains templates that can be configured and set for pre-approval.

Normal changes follow a step-by-step form designed to ensure that no area is



CHERWELL
SOFTWARE™

Executive Summary

• Elevator Pitch

Cherwell Service Management® is a functionality-rich and user friendly tool.

The flexibility of Cherwell Service Management allows customers to automate existing change and configuration processes without the need to compromise the status quo to fit around the tool.

With Cherwell Choice™ concurrent licensing and flexible hosting model, you can choose what works best for your business — Pay-as-you-go or perpetual license, Hosted on-premise, by Cherwell or by a third party.

+ Strengths

- Offers multiple ways to achieve the same outcome (e.g. creating a change request) meaning that users can work whichever way best suits them and their requirements
- Mature change calendar with drag and drop functionality and ability to create changes direct from the calendar view
- Robust collision detection

- Weaknesses

- Requires experience and an increased investment in time to implement release management if your existing process is complex

🏠 Primary Market Focus

Based on the information provided, Cherwell Service Management is primarily a mid-market solution with the ability to be scaled-up to enterprise class organisations



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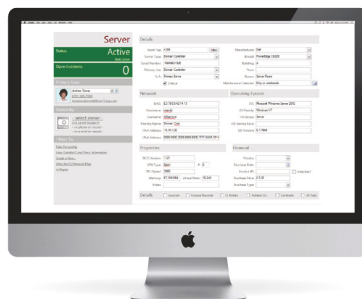
missed with the added bonus of an expanded view that shows all steps in one go. This feature would be especially useful to newcomers or occasional change coordinators who are unsure of all the information required for a change to be submitted. The expanded feature is only available in Read Only to ensure that all steps are completed.

When creating a change, the Risk Impact is dynamically updated by the ticking and un-ticking of certain pre-defined (and customisable) check boxes. The priority is then easy to identify from a table that shows the impact vs. urgency.

Where more than one undertaking is required during a change, tasks can be created to divide work and responsibility. Tasks can be set to run concurrently or once the previous task is completed depending upon configuration, which is again customisable. For more complex changes, the ITPT (IT Project Tracking) can be used. Resources for Tasks (as with Approvers) can either be individuals, teams or expression-based. Expression-based refers to individuals who, for example, are responsible for a specific Configuration Item (CI) (this would change based on which CI was being changed).

Time limits can be set on tasks with the ability for notifications to be sent via e-mail, Dashboards, RSS Feeds or mobile devices.

Changes can be bundled into a release for deployment together. Although these bundled changes may not aggregate a release in the strictest sense, this option is a good one as for the vast majority of organisations, there is no real need for a separate area for this functionality.



Configuration

For discovery and inventory within CSM, you can either use the internal tool or integrate with a third-party application such as SCCM, Altiris, Express Metrics etc. Via OLEDB/ODBC drivers, SQL views, web services or the API.

Whenever a CI is introduced into the CMDB, a snapshot is taken of the CI, and from that point, any changes made to it are noted in the Baseline Changes Tab.

CI forms, like the rest of the tool, are highly configurable with the ability to set fields as mandatory, read-only etc., as you would expect. CIs are easily filterable and easy to locate from within other areas of the system.

CSM has a mature impact analysis tool, which shows a graphical representation of CIs, Services AND Users with the ability to click-through on each type to see historical changes, problems and incidents. Many IT organisations only have a vague idea of what could adversely be affected by changes – if you are one of these organisations we feel that a demonstration of CSM will likely give you hope that it is possible to create a change in complete confidence that everything will not fall down around your ears!

Calendar

In our opinion, the change calendar is one of the most advanced calendars within this Change, Configuration and Release Management review.

There are unlimited maintenance and blackout windows that can be set, and the Collision Detection tool is able to intelligently suggest adjustments to proposed changes, such as escalation to Emergency change if it detects that the date is not within the maintenance window, or date change if the change falls during a blackout window. The change calendar view is customisable by person, group or role (by admin) and contains a number of filters and sorting capabilities for even the most saturated of change environments. If however you decide to use a calendar function

Commercial Summary

Product

Cherwell Service Management

Version reviewed

4.6

Date of version release

November 2013

Year founded

2004

Customers

600+ ITSM customers worldwide

Pricing Structure

Fully inclusive concurrent user usage for both perpetual and SaaS licensing models

Competitive Differentiators

1. Fully integrated management processes that are 100% configurable against an organisation's current and future service request models, without the need to write a single line of code via programming or scripting services
2. Integrated Platform as a Service (PaaS) technology to empower users to easily develop and deliver integrated business services offerings
3. Quick, easy, and seamless system upgrades, as well as low cost of ownership for on-going system management overheads



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external to Cherwell Service Management, (although we have no idea why you would want to) items in the calendar can be exported in iCal or vCal format and can be automated using one-step automation actions.

Functionality that ITSM Review especially likes is the ability to create a change from within the calendar and also “drag and drop” changes to another date.

What never ceases to amaze us is the amount of change processes that make life so complicated for change manager’s/coordinator’s etc., which means that they spend more time requesting changes than actually doing them. Although Cherwell can do nothing about your specific process implemented within your organization, it has at least made it such that CSM is no longer a further hindrance.

One size does not fit all with ITSM tools, and being able to do the same things several ways suggests to me that Cherwell is more about fitting the tool around the people and process than vice versa.

Approvals

As mentioned with Tasks, Approvers can either be individuals, teams or expression-based, and time limits can be set with approvals being able to be sent via e-mail or by logging into the tool (including on mobile devices).

The approval matrix can be set to a straight Yes/No response or a percentage response option giving approvers the ability to accept, decline or abstain the request.

Depending on your personal set up, approvals can go to backup approvers or auto decline etc. In the event that there is no response by the end of the time specified. Using workflow in CSM approvals provides infinite possibilities with even the most complicated approval process feasible. All requested approvals are stored in the database and can be viewed via a report on the dashboard.

In Summary

Unless you are an organisation with advanced or complex release management requirements, we highly recommend that you consider Cherwell Service Management as your tool of choice.

In Their Own Words

Cherwell Software is one of the fastest growing IT service management software providers. It began with simple goals: to make service desk software it would want to use and to do business honestly, putting customers first. Cherwell Software is passionate about customer care and is dedicated to creating “innovative technology built upon yesterday values.”

The company has corporate headquarters in Colorado Springs, CO, U.S.A. and EMEA headquarters in Swindon, U.K. A global team of dedicated employees and expert partners who appreciate the technology – but love customers – serve in North America, South America, Asia and Australia. Cherwell Software received the 2013 SDI Best Vendor for Customer Service award.

Cherwell’s flagship product, Cherwell Service Management®, delivers an innovative, award-winning and holistic approach to service management, allowing IT and support departments to align with organisation strategy and to deliver maximum IT business value. Cherwell Service Management is the affordable, easy-to-use, ITSM suite with maximum portability. With Cherwell Choice™ concurrent licensing and flexible hosting model, you can choose what works best for your business — SaaS or purchase, and hosted on-premises, hosted by Cherwell or hosted by a third party.

→ **Read the full review online**



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