Account Tracking mApp

Overview

This map adds in a new Account Tracking supporting object (extended custom join table) that is used to track user accounts in applications and systems. The account object is linked to the Customer records and Configuration item. That way you can see what accounts a user has as well as what CIs the account(s) are linked to.

You can create/edit user accounts from Customer, Config Item and Incident.

When a customer is designated as the requestor on an Incident their existing accounts show up on the new tab. You can then create new account(s) that are related to the ticket.

You can add an additional relationship on Incident for On-Behalf-Of if desired.

You may wish to add additional tabs on CIs you have added to the system that are appropriate. Look at the existing CIs to see how to replicate the tabs. Note that the stored expressions for CIs are found under the Configuration Group and not the individual CI types.

Many people create a Config-System entry for Active Directory so they can associate customer's AD accounts using this mApp.

You may also automated account creation via imports. If you go this route, please make sure you populate the parent and child type IDs or the relationship records won't show up correctly.

Major Changes/Additions

Objects:

1. Accounts – new supporting object (extended custom join table)

Relationships:

1. Customer Group Links Configuration Group
2. Customer Group Links Accounts
3. Configuration Group Links Accounts
4. Incident Links Accounts based on Requestor Rec ID
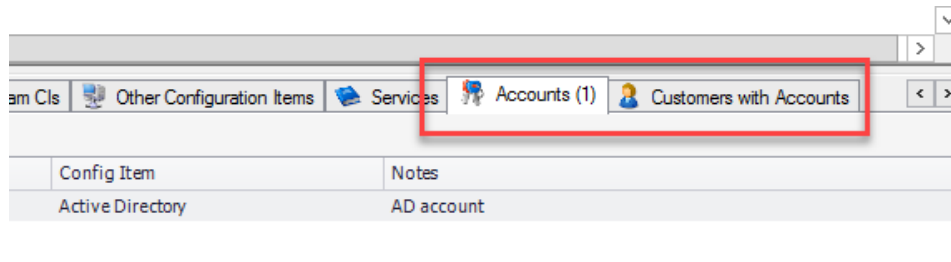
Form Arrangements:

1. Adds tabs to Customer – Internal
2. Adds tabs to Select Configuration Items
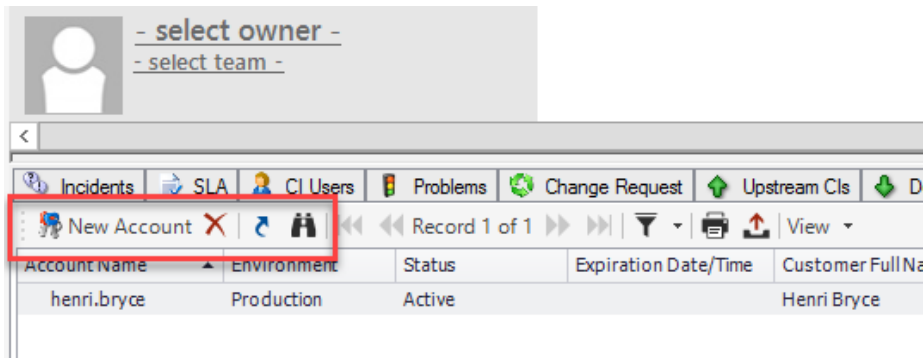3. Adds a tab to Incident

Searches:

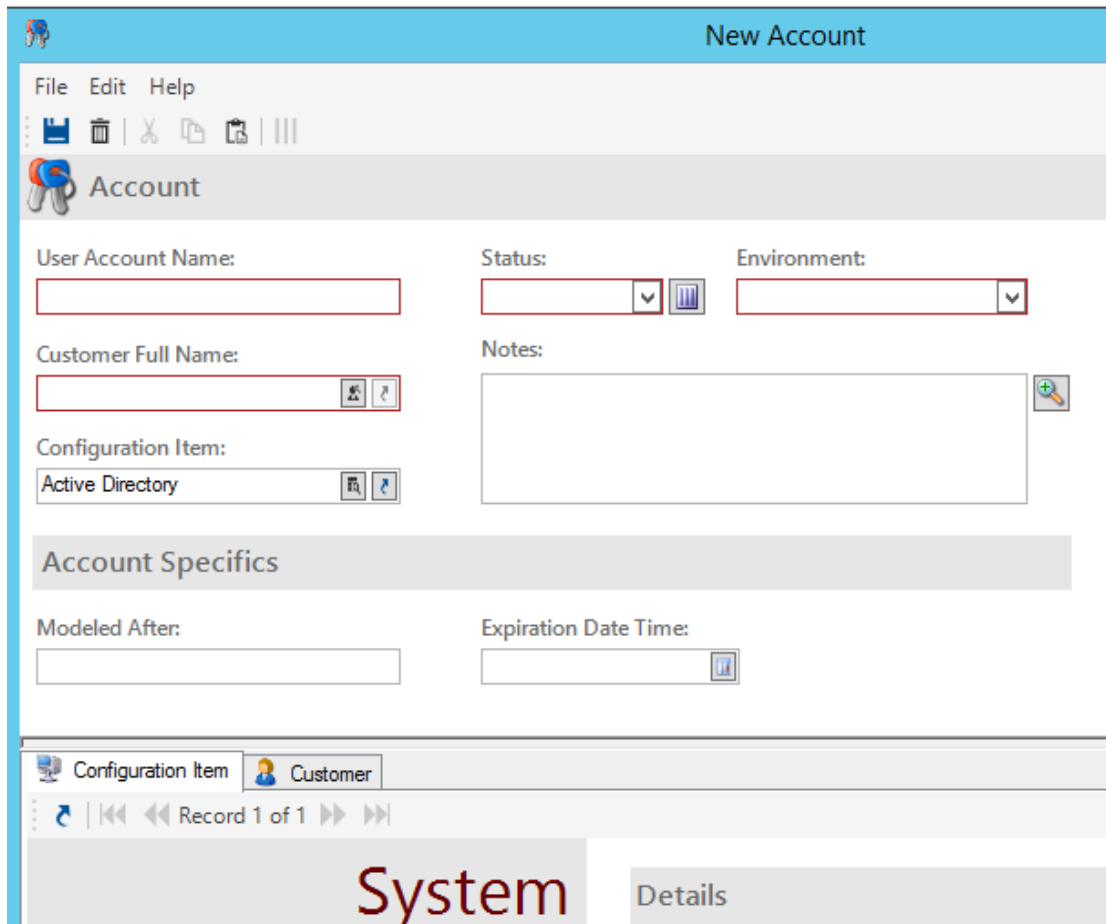1. All Accounts
2. Active Accounts

Configuration Items

Find the tabs with a list of all user accounts and a list of all customers that have accounts associated with the selected configuration item.

Create and edit accounts for the selected configuration item on the Accounts tab.

Customer Internal

Find the tabs with a list the user's accounts and a list of all systems the customer has accounts associated with for the selected customer.

Create and edit accounts for the selected customer on the Accounts tab.

Create and edit accounts for the selected customer on the Accounts tab.

Incident

Find a tab with a list of all of the user's accounts where you can create new accounts and edit existing ones.

Account Records

The account records are stored as a supporting object that is an extended join table. You may use the provided stored searches to find existing records.
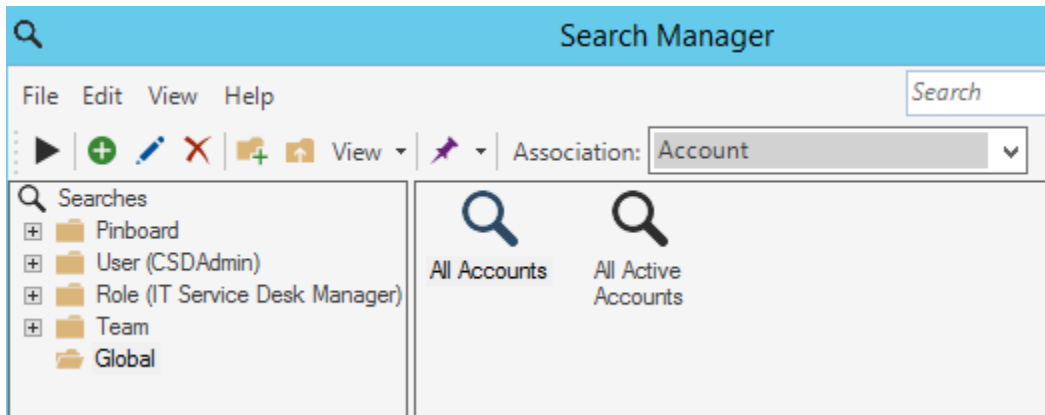
You may directly edit an existing account record here. You may also link the account object to an external data source and populate it using a scheduled job. If you chose this route you must populate the parent type ID and the child type ID fields.