Assignment and Status History mApp v2

This is version 2 of the mApp, and it has been updated to include both assignment history and status history tracking into one mApp. We made this update because many of you requested that we give you a one-stop solution.

The Assignment and Status History mApp is a non-destructive mApp that expands your existing system. The mApp uses stored values to toggle the status tracking portion. The following parameters are tracked as listed per object in tabs on each object. The aggregate of all records are stored in the "Assignment History" supporting object. We have provided several stored searches to get you started. A custom dashboard with three-way filtering is included, as well.

One of the core advantages of this mApp, is the ability to tell the story of how an Incident moved through your company throughout the lifecycle of the ticket. It also makes it very easy to search for assignment changes by technician to see how they are handling tickets in any date range.

Tracked parameters by object

Incident
1. Owned By changes: Previous Owner; New Owner; Who made the change; time stamps and durations in minutes, hours, and days
2. Owned By Team changes: Previous Team; New Team; Who made the change; time stamps and durations in minutes, hours, and days
3. Status changes (optional – controlled by stored value): Previous Status; New Status; Who made the change; time stamps and durations in minutes, hours, and days

Problem
1. Status changes (optional – controlled by stored value): Previous Status; New Status; Who made the change; time stamps and durations in minutes, hours, and days

Change Request
1. Status changes (optional – controlled by stored value): Previous Status; New Status; Who made the change; time stamps and durations in minutes, hours, and days

Knowledge Article
1. Status changes (optional – controlled by stored value): Previous Status; New Status; Who made the change; time stamps and durations in minutes, hours, and days

Base Version

Created in Cherwell Version 8.2.3.

Instructions

Prior Versions

If you have previously applied the "**Assignment History mApp 030117**" and have not altered it, you may apply this mApp over-top of it. It will update the existing pieces and extend it.

If you have applied the stand-alone "**Status Tracking**" mApp that Excalibur has previously published, you will have collisions. In that case, you should use the "Assignment History mApp 030117" from the mApp Exchange instead of this one. To gain the assignment tracking capabilities.

Apply mApp

1. Apply Assignment History mApp to your Cherwell system and create a blueprint to review.
2. Update the stored values in the blueprints folder to toggle the status tracking desired per object. All status tracking is ON by default in the mApp.
3. Read the Known Issue instructions directly below this section to see if you wish to resolve the Knowledge Article status tracking issue.
4. Once applied and published to your system, please test to ensure all pieces are working and displayed as noted below.

Known Issue

Knowledge Article doesn't apply the save action that is in the mApp. We are working to find a solution and you can very easily apply the workaround. To be able to track status on Knowledge Articles, please follow these steps after you have created the blueprint and before you publish:
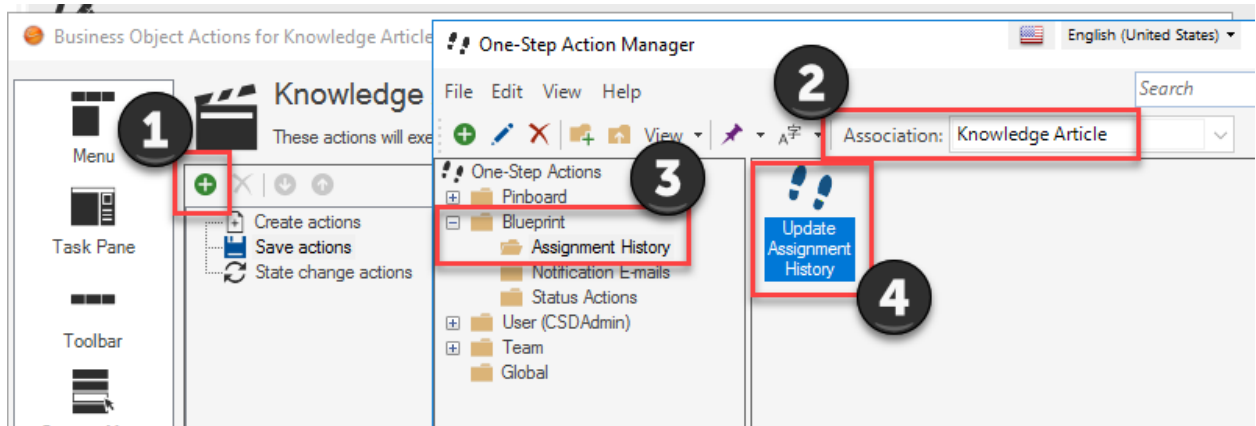
1. Edit the actions on the Knowledge Article business object
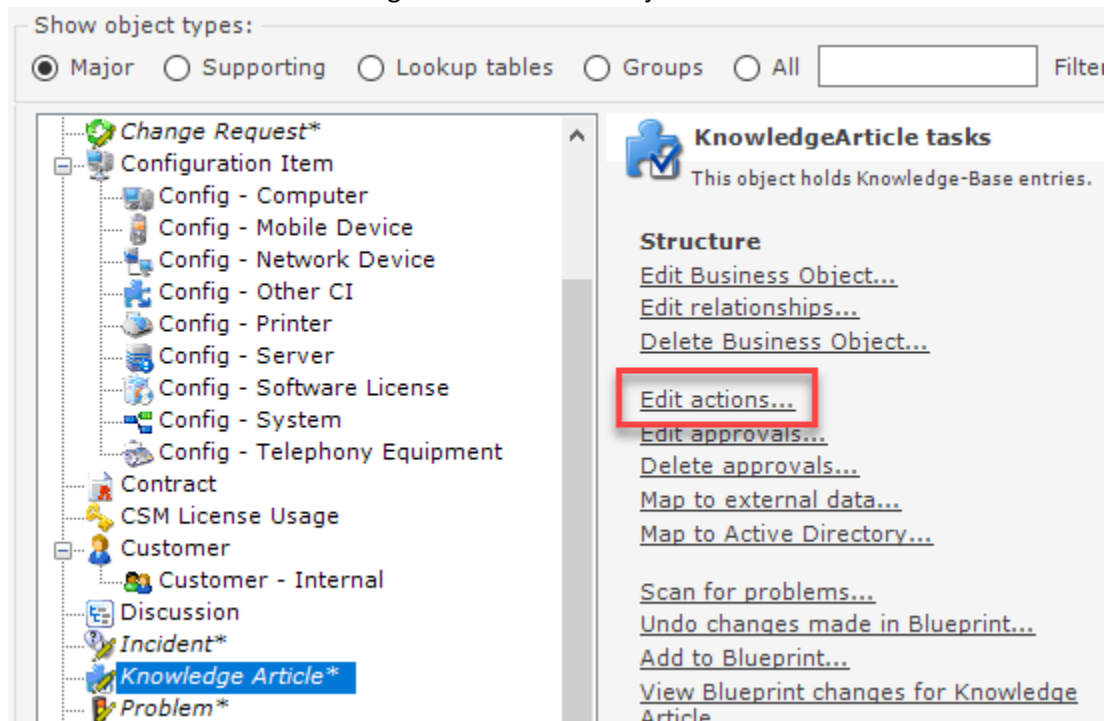
2. Click on Automatic Actions and then on Save Actions
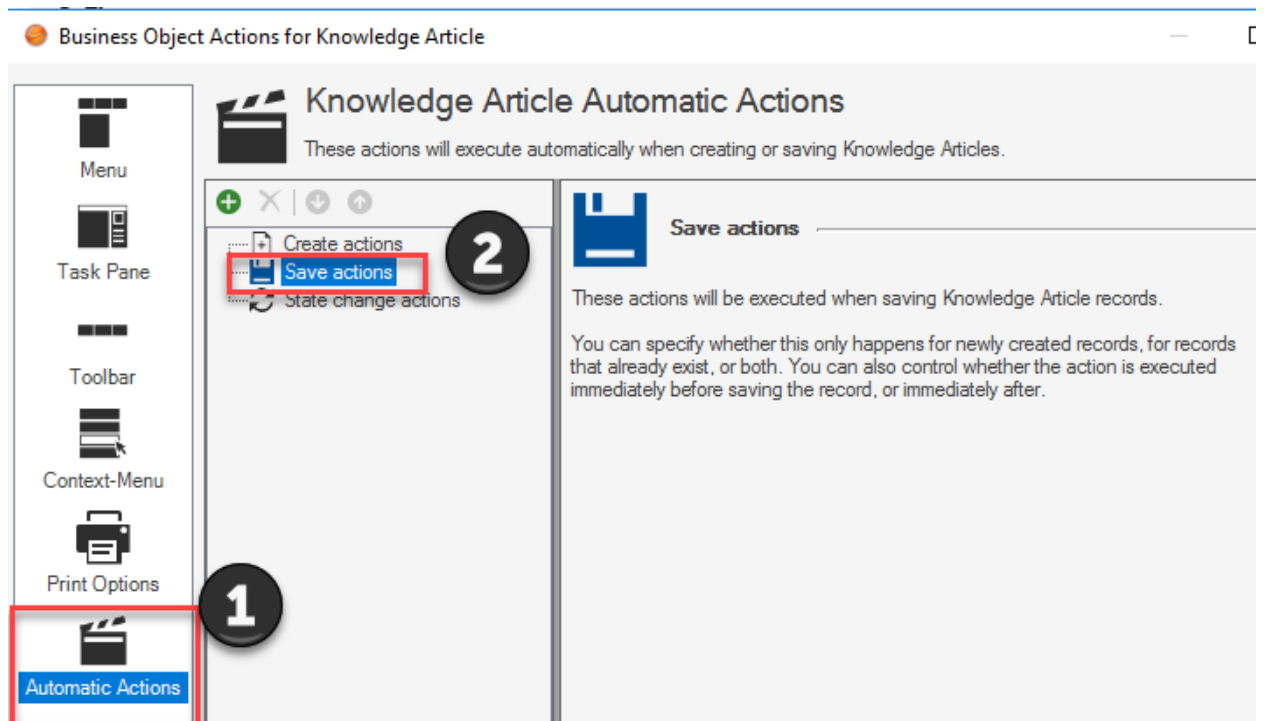
3. Click on the green plus (+) icon, make sure the association is set to "Knowledge Article", navigate to the "Blueprint" and then "Assignment History" folder, and select the "Update Assignment History" one-step and click "OK"

4. Change the checkboxes to look like this (#1) and then click the square root button (#2) to define a custom expression that controls when this action fires.
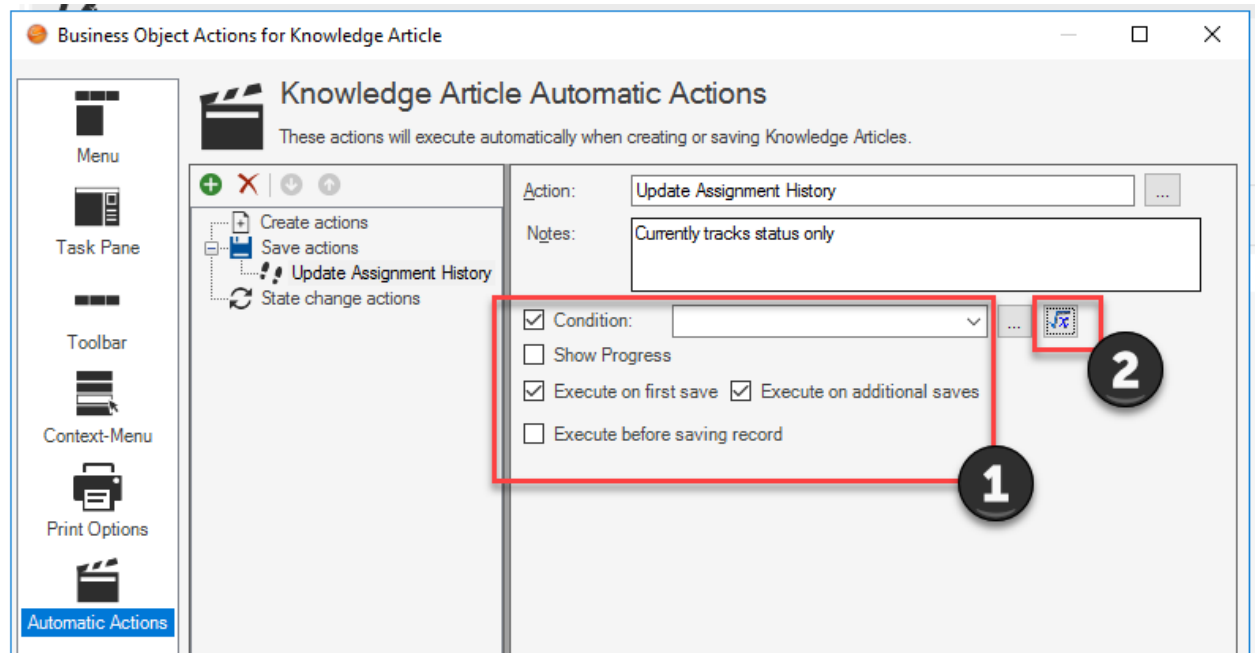
5. Set the expression to use the stored value "Knowledge Status Tracking" from the "Blueprint/Assignment Tracking" folder and see if it equals True. Then click "OK".
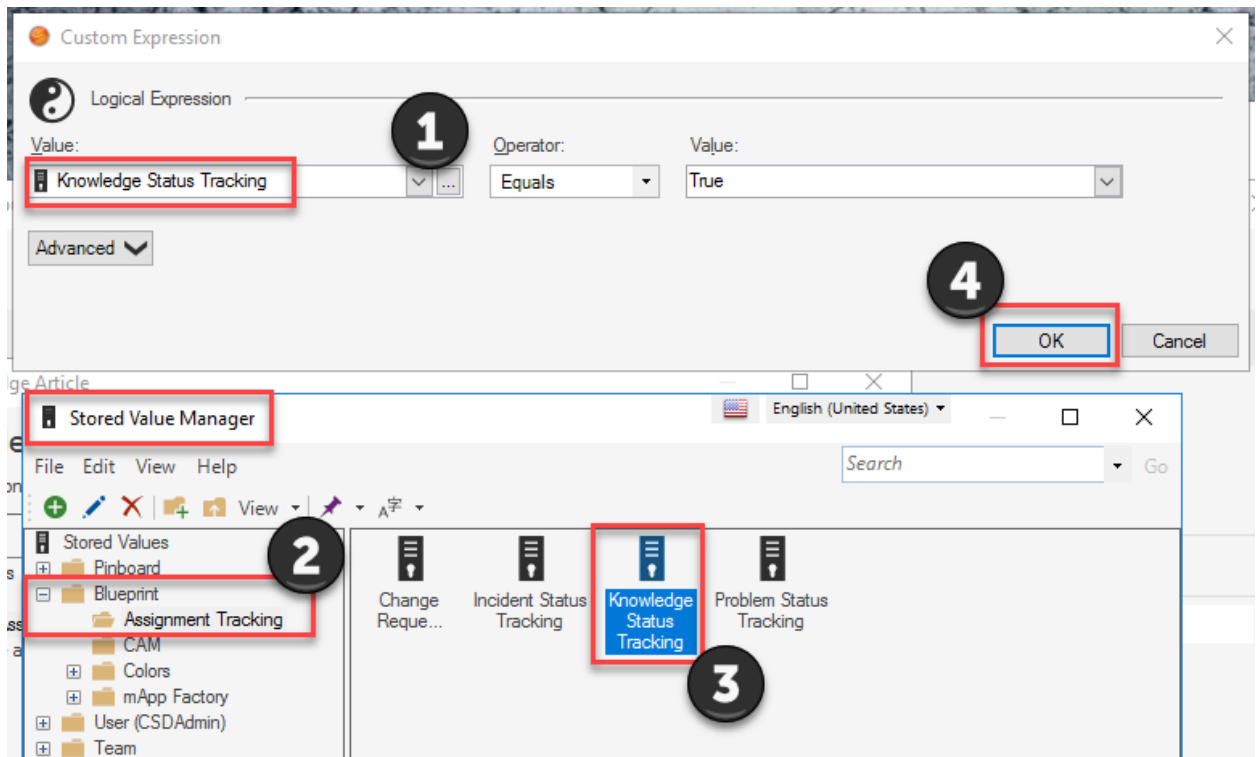
6. Click "OK" to finish configuring the Automatic Actions. Save your blueprint and continue on with the configuration steps above.
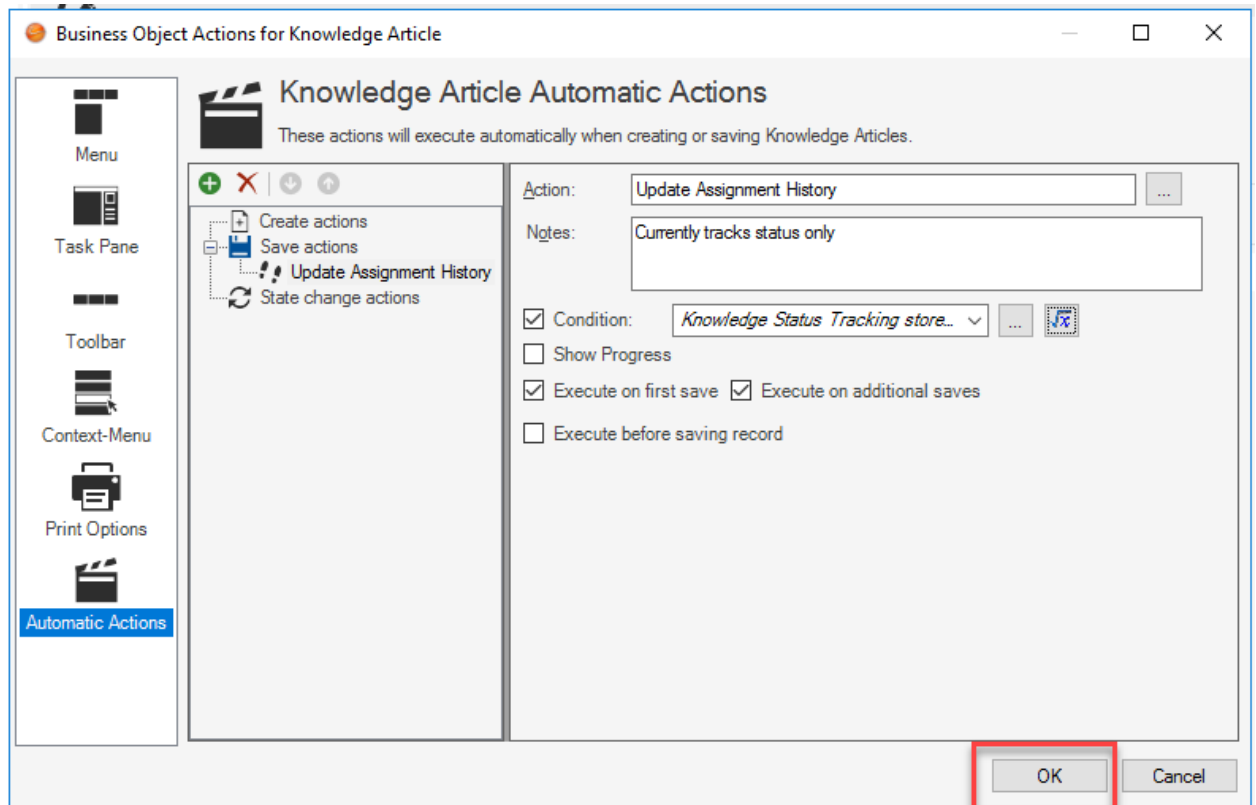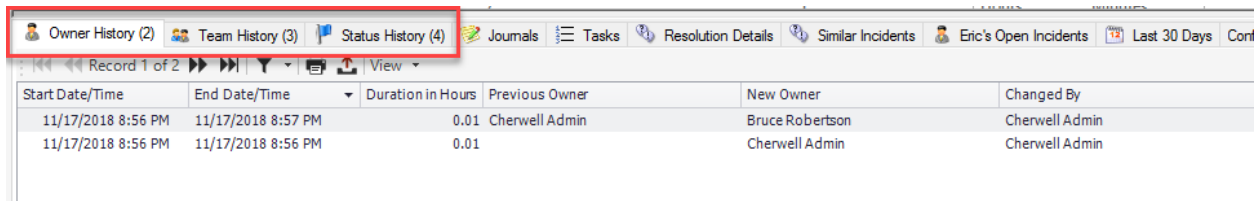
What does this mApp add to your system?

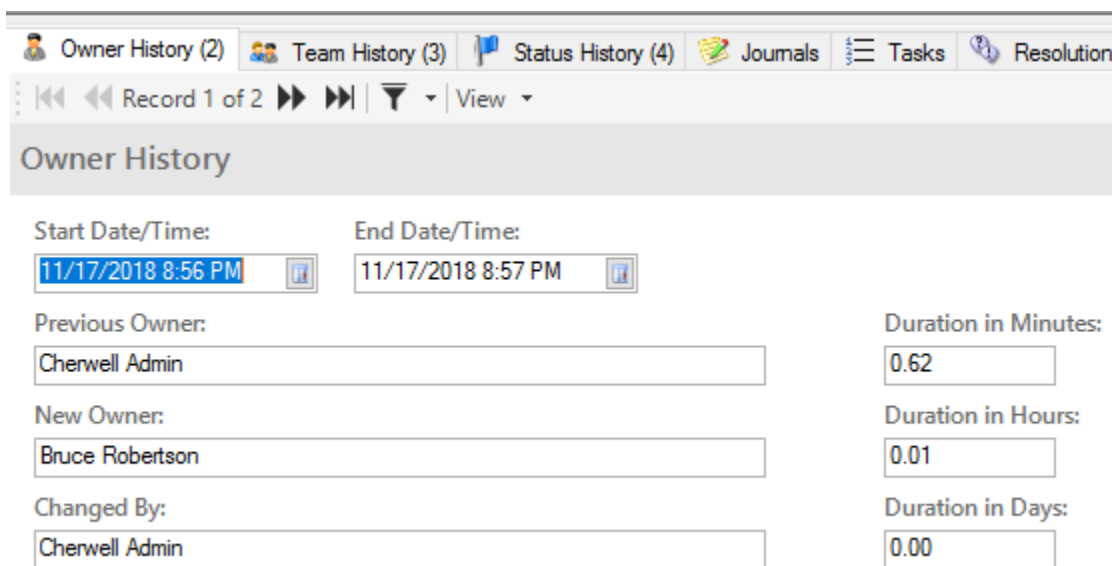The big items added to the system are listed here by object:

Incident

1. Status tracking is toggled ON/OFF by a stored value in the blueprints folder.
2. If enabled the Status changes are displayed on a tab that becomes visible once changes to the status have been made and saved.
3. Owner changes are displayed on a tab that becomes visible once changes to the Owner have been made and saved.
4. Team changes are displayed on a tab that becomes visible once changes to the Owned By Team have been made and saved.

Problem

1. Status tracking is toggled ON/OFF by a stored value in the blueprints folder.
2. If enabled the Status changes are displayed on a tab that becomes visible once changes to the status have been made and saved.

Start Date/Time	End Date/Time	Duration in Hours	Previous Status	New Status	Changed By
11/17/2018 8:29 PM	11/17/2018 8:29 PM	0.01	Resolved	Closed	Cherwell Admin
11/17/2018 8:28 PM	11/17/2018 8:29 PM	0.01	Work in Progress	Resolved	Cherwell Admin
11/17/2018 8:28 PM	11/17/2018 8:28 PM	0.00	Assigned	Work in Progress	Cherwell Admin
11/17/2018 8:28 PM	11/17/2018 8:28 PM	0.00		Assigned	Cherwell Admin

Change Request

1. Status tracking is toggled ON/OFF by a stored value in the blueprints folder.
2. If enabled the Status changes are displayed on a tab that becomes visible once changes to the status have been made and saved.

Start Date/Time	End Date/Time	Duration in Hours	Previous Status	New Status	Changed By
11/17/2018 8:35 PM	11/17/2018 8:36 PM	0.02	Approving	Review	Cherwell Admin
11/17/2018 8:35 PM	11/17/2018 8:35 PM	0.00	Approving	Approving	Cherwell Admin
11/17/2018 8:33 PM	11/17/2018 8:35 PM	0.02	Approval	Approving	Cherwell Admin
11/17/2018 8:33 PM	11/17/2018 8:33 PM	0.01	Assessing	Approval	Cherwell Admin
11/17/2018 8:33 PM	11/17/2018 8:33 PM	0.00	New	Assessing	Cherwell Admin
11/17/2018 8:32 PM	11/17/2018 8:33 PM	0.01		New	Cherwell Admin

Knowledge Article

1. Status tracking is toggled ON/OFF by a stored value in the blueprints folder.
2. If enabled the Status changes are displayed on a tab that becomes visible once changes to the status have been made and saved.

Start Date/Time	End Date/Time	Duration in Hours	Previous Status	New Status	Changed By
11/17/2018 8:49 PM	11/17/2018 8:49 PM	0.00	Approval	Published	Cherwell Admin
11/17/2018 8:48 PM	11/17/2018 8:48 PM	0.00	Review	Approval	Cherwell Admin
	11/17/2018 8:48 PM	0.00		Review	Cherwell Admin

Assignment History (supporting object)

The Assignment History object holds all tracking records. There are tabs at the bottom of the object that show the related parent object with the ability to "Go To" the object.

Assignment and Status History

Entry Type:

Previous Owner:

Start Date/Time:

Previous Owned By Team:

End Date/Time:

Previous Status:

Duration in Minutes:

New Owner:

Duration in Hours:

New Owned By Team:

Duration in Days:

New Status:

Record Changed By:

Incident | Problem | Change Request | Knowledge Article

No records

Incident
Value

Status
Value

Review:
Next:

on 1st Call!

Step 1: Record the Details

Description:

Stored Searches

There are multiple stored searches provided for this object as examples to get you up to speed quicker, including one with date range prompts.
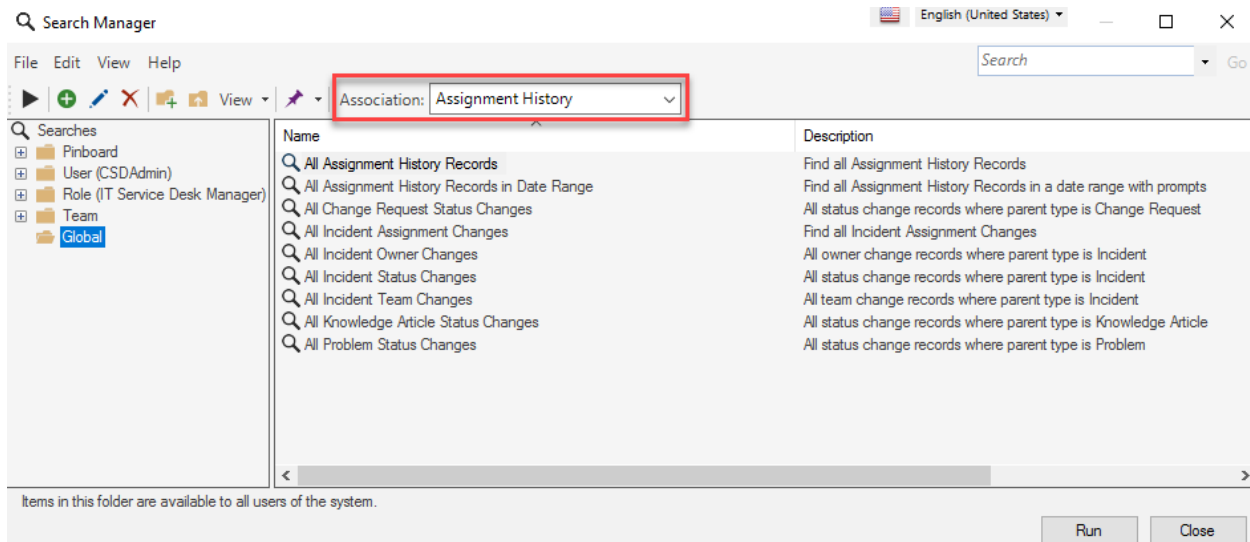
Stored Values

Toggle these stored values to control whether status tracking is ON/OFF per object.

Dashboards

A sample Assignment History dashboard has been included with multiple filters to give you some ideas and springboard your implementation.
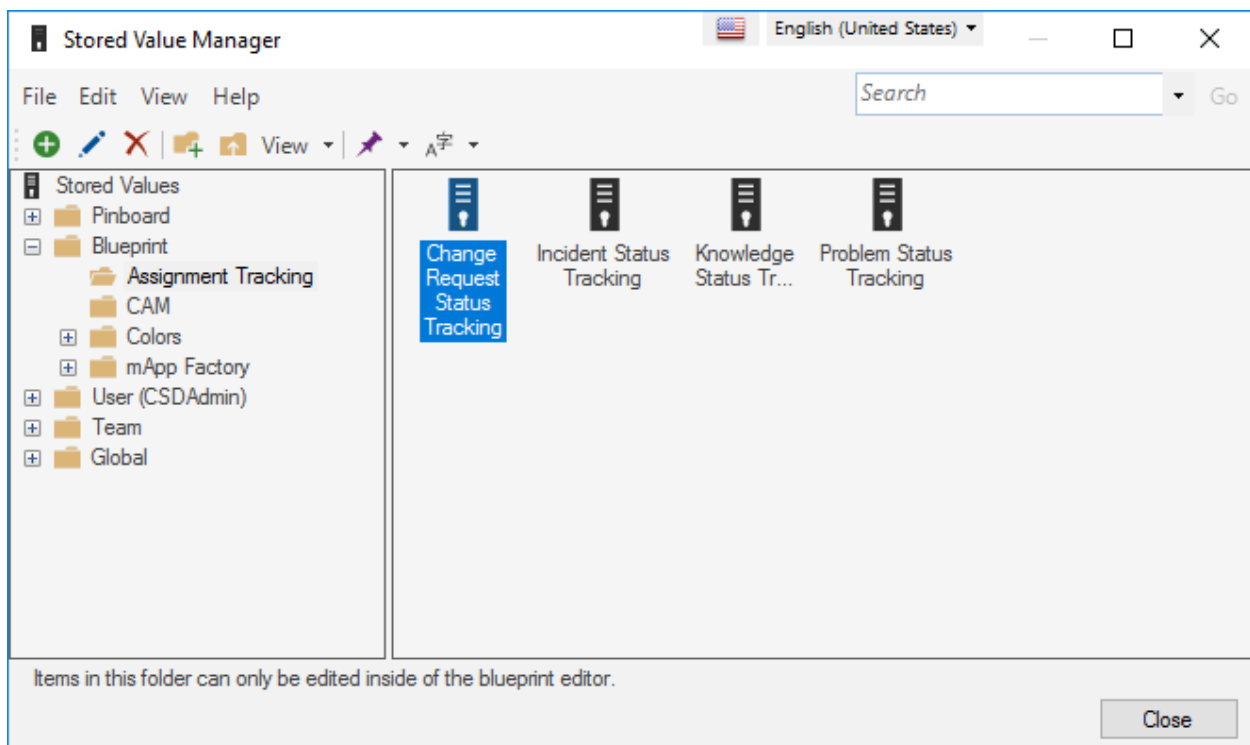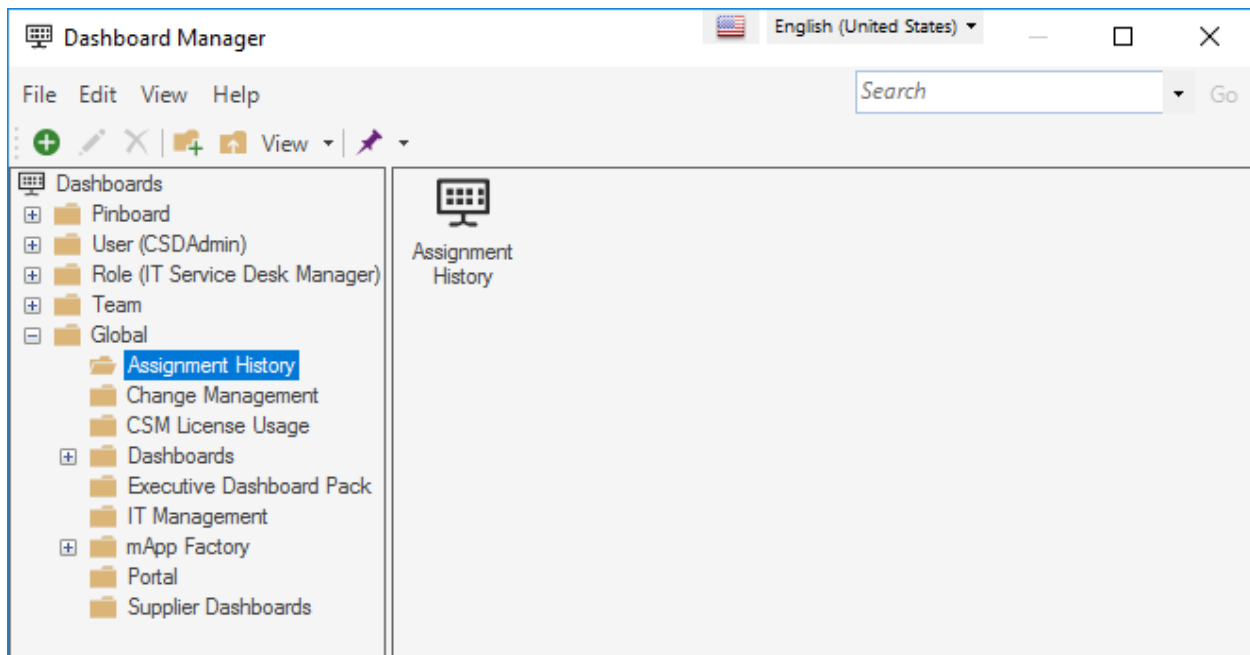
Dashboard Manager

English (United States)

File Edit View Help

Search Go

View

Dashboards
- Pinboard
- User (CSDAdmin)
- Role (IT Service Desk Manager)
- Team
- Global
  - Assignment History
  - Change Management
  - CSM License Usage
  - Dashboards
  - Executive Dashboard Pack
  - IT Management
  - mApp Factory
  - Portal
  - Supplier Dashboards

Assignment History

Incidents
Saturday, November 17, 2018

Global IT Incidents and Requests	38
My Work My Open Incidents	0
Incidents Total Open Incidents	16
Requests Total Open Requests	22
Problems All Open Problems	11
Changes Open Change Requests	20
CMDB Total Assets	69
Reporting Incidents this Year	52
Knowledge Articles	350

See Additional Dashboards

Business Object Filter: Any

Entry Type Filter: Any

All Assignment History Records

Parent Type	Parent ID	Entry Type	Start Date/Time	End Date/Time	Duration in Hours	Previous Owner	Previous Team	Previous Status	New Owner	New Team
Knowledge Article	10333	Status Change	11/17/2018 8:49 PM	11/17/2018 8:49 PM	0.00	[Not Tracked]	[Not Tracked]	Approval	[Not Tracked]	[Not Tracked]
Knowledge Article	10333	Status Change	11/17/2018 8:48 PM	11/17/2018 8:48 PM	0.00	[Not Tracked]	[Not Tracked]	Review	[Not Tracked]	[Not Tracked]
Knowledge Article	10333	Status Change		11/17/2018 8:48 PM	0.00	[Not Tracked]	[Not Tracked]		[Not Tracked]	[Not Tracked]
Change Request	10950	Status Change	11/17/2018 8:35 PM	11/17/2018 8:36 PM	0.02	[Not Tracked]	[Not Tracked]	Approving	[Not Tracked]	[Not Tracked]
Change Request	10950	Status Change	11/17/2018 8:35 PM	11/17/2018 8:35 PM	0.00	[Not Tracked]	[Not Tracked]	Approving	[Not Tracked]	[Not Tracked]
Change Request	10950	Status Change	11/17/2018 8:33 PM	11/17/2018 8:35 PM	0.02	[Not Tracked]	[Not Tracked]	Approval	[Not Tracked]	[Not Tracked]
Change Request	10950	Status Change	11/17/2018 8:33 PM	11/17/2018 8:33 PM	0.00	[Not Tracked]	[Not Tracked]	Assessing	[Not Tracked]	[Not Tracked]
Change Request	10950	Status Change	11/17/2018 8:32 PM	11/17/2018 8:33 PM	0.01	[Not Tracked]	[Not Tracked]	New	[Not Tracked]	[Not Tracked]
Change Request	10950	Status Change	11/17/2018 8:32 PM	11/17/2018 8:33 PM	0.01	[Not Tracked]	[Not Tracked]		[Not Tracked]	[Not Tracked]
Problem	10232	Status Change	11/17/2018 8:29 PM	11/17/2018 8:29 PM	0.01	[Not Tracked]	[Not Tracked]	Resolved	[Not Tracked]	[Not Tracked]
Problem	10232	Status Change	11/17/2018 8:28 PM	11/17/2018 8:29 PM	0.01	[Not Tracked]	[Not Tracked]	Work in Progress	[Not Tracked]	[Not Tracked]
Problem	10232	Status Change	11/17/2018 8:28 PM	11/17/2018 8:28 PM	0.00	[Not Tracked]	[Not Tracked]	Assigned	[Not Tracked]	[Not Tracked]
Problem	10232	Status Change	11/17/2018 8:28 PM	11/17/2018 8:28 PM	0.00	[Not Tracked]	[Not Tracked]		[Not Tracked]	[Not Tracked]
Problem	10231	Status Change	11/17/2018 8:27 PM	11/17/2018 8:28 PM	0.01	[Not Tracked]	[Not Tracked]	Work in Progress	[Not Tracked]	[Not Tracked]
Problem	10231	Status Change	11/17/2018 8:27 PM	11/17/2018 8:27 PM	0.00	[Not Tracked]	[Not Tracked]	Assigned	[Not Tracked]	[Not Tracked]
Problem	10231	Status Change	11/17/2018 8:27 PM	11/17/2018 8:27 PM	0.00	[Not Tracked]	[Not Tracked]	New	[Not Tracked]	[Not Tracked]
Problem	10231	Status Change	11/17/2018 8:27 PM	11/17/2018 8:27 PM	0.01	[Not Tracked]	[Not Tracked]		[Not Tracked]	[Not Tracked]

Customization

Please reach out to us at +1-724-387-1331 if you would like help customizing this mApp or any other aspect of your Cherwell CSM and/or CAM system.