

# 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.

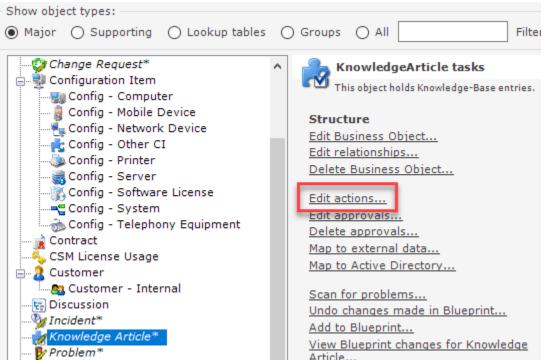
If you have applied the stand-alone "**Status Tracking**" mApp that Excalibur has previously published, you will have collisions. In that case, you should use the "Assignment History mApp 030117" from the mApp Exchange instead of this one. To gain the assignment tracking capabilities.

### Apply mApp

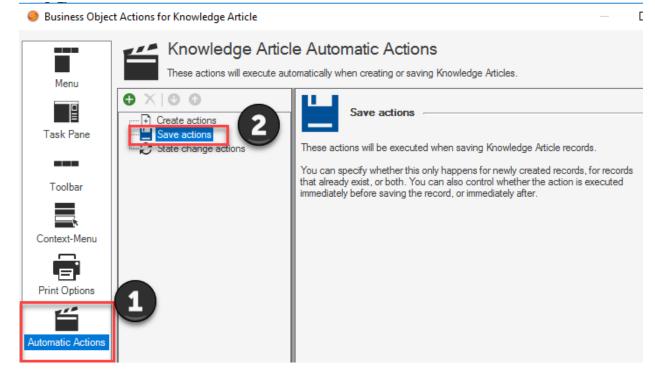
- 1. Apply Assignment History mApp to your Cherwell system and create a blueprint to review.
- 2. Update the stored values in the blueprints folder to toggle the status tracking desired per object. All status tracking is ON by default in the mApp.
- 3. Read the Known Issue instructions directly below 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



 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"

Business Object	t Actions for Knowledge Article	🕴 One-Step Action Manager 🛛 🔤 English (Un	nited States) 🔻
	Knowledge These actions will exe	File Edit View Help	Search
Menu Task Pane	Create actions Create actions Save actions State change actions	One-Step Actions     Pinboard     Blueprint     Assignment History     Notification E-mails	
Toolbar			

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.

🥮 Business Object	🥮 Business Object Actions for Knowledge Article - 🗆 🗙					
Menu	These actions will execute aut		atic Actions creating or saving Knowledge Articles.			
Task Pane	Create actions Create actions Update Assignment History	<u>A</u> ction: N <u>o</u> tes:	Update Assignment History Currently tracks status only			
Toolbar Context-Menu	$\sim \mathcal{C}$ State change actions				2	
Print Options				,		

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".

ſ	Oustom Expression			×
	Logical Expression Value: Knowledge Status Tracking Advanced	Operator: Equals	Vaļue: True	
e on	File Edit View Help		English (United States)	OK Cancel
s	Blueprint     Assignment Tracking     Ch     Re	ange Incident Status Know que Tracking Sta	Wedge atus cking	

6. Click "OK" to finish configuring the Automatic Actions. Save your blueprint and continue on with the configuration steps above.

Business Object Actions for Knowledge Article				×
Knowledge Article	Automatic Actions hatically when creating or saving Knowl Action: Update Assignment Hist Notes: Currently tracks status of Condition: Knowledge Statu Show Progress Execute on first save Execut Execute before saving record	story only <i>us Tracking store</i> V		_
		ОК	C	ancel

# 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.

👃 Owner History (2)	Team History (3) 🛛 🏴 S	tatus History (4) 📝 Journa	als 🗦 Tasks 🤻	Resolution Deta	ails 🔌 Similar Ind	idents 🚨	Eric's Open Incidents	🔨 Last 30 Days Co
🗄 📢 Record 1 of 2 🕨	) )) Y - 🗐 🕹	View 👻						
Start Date/Time E	nd Date/Time	Duration in Hours Previo	ous Owner	N	ew Owner		Changed By	
11/17/2018 8:56 PM 1	1/17/2018 8:57 PM	0.01 Cherv	vell Admin	B	ruce Robertson		Cherwell Admir	n
11/17/2018 8:56 PM 1	1/17/2018 8:56 PM	0.01		C	herwell Admin		Cherwell Admir	n
		History (3) 🏴 S		(4) 🦻 Jo	oumals 🚦	Tasks	🗞 Resolutio	n
e de Record	1 of 2 🕨 🕨	View	•					
Owner Histo	ry							
Start Date/Time		End Date/Time:						
11/17/2018 8:56	PM 🔟	11/17/2018 8:57	PM 🔳					
Previous Owner	:					Duratio	on in Minutes	:
Cherwell Admin						0.62		
New Owner:						Duratio	on in Hours:	
Bruce Robertson						0.01		
Changed By:						Duratio	on in Days:	
Cherwell Admin						0.00		

#### 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.

🏴 Status History (4) 🛛 Journals 🗮 Tasks Configuration Items 🖏 Incidents 🧔 Change Request					
🕂 📢 Record 1 of 4 🕪 🔛   🍸 🚽 💼 🗘   View 👻					
End Date/Time	<ul> <li>Duration in Hours</li> </ul>	Previous Status	New Status	Changed By	
11/17/2018 8:29 PM	0.01	Resolved	Closed	Cherwell Admin	
11/17/2018 8:29 PM	0.01	Work in Progress	Resolved	Cherwell Admin	
11/17/2018 8:28 PM	0.00	Assigned	Work in Progress	Cherwell Admin	
11/17/2018 8:28 PM	0.00		Assigned	Cherwell Admin	
	End Date/Time         Image: Constraint of the second	Image: Weight of the system         Image: Weight of the system         View         Image: Weight of the system         Image: Weight of the	Image: Tend Date/Time         Image: View         Image: View         Image: Previous Status           11/17/2018 8:29 PM         0.01         Resolved           11/17/2018 8:29 PM         0.01         Work in Progress           11/17/2018 8:28 PM         0.00         Assigned	Image: Constraint of the state of	

### 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.

Record 1 of 6	D D T - 🖶 🗘	View 👻			
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.

🏴 Status History (3) 🚦 Approval History 爹 Journals 🚯 Comments 🏮 Problem					
🕴 📢 🤻 Record 1 of 3 🕨 🔛   🍸 👻   🖶 🗘 View 👻					
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.

Assignme	nt and S	Status History	
Entry Type:	Previous Owner: Previous Owned	By Team:	
End Date/Time:	Previous Status:		
Duration in Hours: Duration in Days:	New Owned By T New Status:	eam:	
Record Changed By:			
Incident     Image: Problem     Image: Characteristic state       C     Image: Characteristic state     Image: Characteristic state	ange Request 🛛 📩 Knowle	edge Article	
	Incident Value	on 1st Call!	
Status Review:	Value <sub>Next:</sub>	Step 1: Record the Details	Са

### 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.

<b>Q</b> Search Manager		English (United States) • 🗌 🗙
File Edit View Help	Association: Assignment History	Search • Go
<ul> <li>Q. Searches</li> <li>              Pinboard          </li> <li>             Ber (CSDAdmin)         </li> <li>             Fole (IT Service Desk Manager)         </li> <li>             Global         </li> </ul>	Name All Assignment History Records All Assignment History Records in Date Range All Change Request Status Changes All Incident Assignment Changes All Incident Status Changes All Incident Status Changes All Incident Team Changes All Problem Status Changes All Problem Status Changes	Description Find all Assignment History Records Find all Assignment History Records in a date range with prompts All status change records where parent type is Change Request Find all Incident Assignment Changes All owner change records where parent type is Incident All status change records where parent type is Incident All status change records where parent type is Incident All status change records where parent type is Knowledge Article All status change records where parent type is Problem
Items in this folder are available to all use	ers of the system.	Run Close

### Stored Values

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

Stored Value Manager			En En	nglish (United States) 🔻		×
File Edit View Help				Search		- Go
🖯 🖍 🗡 📫 🖬 View 🛛 🖈	▼ ₄字 ▼					
<ul> <li>Stored Values</li> <li>Pinboard</li> <li>Blueprint</li> <li>CAM</li> <li>Colors</li> <li>MApp Factory</li> <li>User (CSDAdmin)</li> <li>Team</li> <li>Global</li> </ul>	Change Request Status Tracking	cident Status Tracking		Problem Status Tracking		
Items in this folder can only be edited insi	de of the blueprint	editor.			Clo	ose

## 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) - X
File Edit View Help	Search - Go
🔁 🖉 📉 📫 🛤 View 👻 🖈	
Image: Dashboards         Image: Pinboard         Image: Diser (CSDAdmin)         Image: Role (IT Service Desk Manager)         Image: Role (IT Service (IT Se	

Incidents Saturday, November 17, 2018		Business Object Filter: Any		Entry Type Filter: Any					Presented by: Cherwell Software Filter: Any time		
Global IT		All Assignr	nent Hi			Fed Data (Tara	Duration in Hours     Previous Owner	Previous Team	Previous Status	New Owner	New Team
Incidents and Requests	38	Knowledge Artide		Entry Type Status Change	Start Date/Time 11/17/2018 8:49 PM			[Not Tracked]	Approval	[Not Tracked]	[Not Tracked]
		Knowledge Artide	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]
My Work	0	Knowledge Artide	10333	Status Change		11/17/2018 8:48 PM		[Not Tracked]		[Not Tracked]	[Not Tracked]
My Open Incidents	U	Change Request		Status Change		11/17/2018 8:36 PM		[Not Tracked]	Approving	[Not Tracked]	[Not Tracked]
		Change Request	10950	Status Change		11/17/2018 8:35 PM		[Not Tracked]	Approving	[Not Tracked]	[Not Tracked]
Incidents	16	Change Request	10950	Status Change	11/17/2018 8:33 PM			[Not Tracked]	Approval	[Not Tracked]	[Not Tracked]
Total Open Incidents	16	Change Request	10950	Status Change		11/17/2018 8:33 PM		[Not Tracked]	Assessing	[Not Tracked]	[Not Tracked]
iour open incidento		Change Request	10950	Status Change		11/17/2018 8:33 PM		[Not Tracked]	New	[Not Tracked]	[Not Tracked] [Not Tracked]
Requests	22	Change Request Problem	10950 10232	Status Change Status Change		11/17/2018 8:33 PM 11/17/2018 8:29 PM		[Not Tracked] [Not Tracked]	Resolved	[Not Tracked] [Not Tracked]	[Not Tracked]
Total Open Requests	22	Problem	10232	Status Change		11/17/2018 8:29 PM		[Not Tracked]	Work in Progress	[Not Tracked]	[Not Tracked]
lotal Open Requests		Problem	10232	Status Change		11/17/2018 8:28 PM		[Not Tracked]	Assigned	[Not Tracked]	[Not Tracked]
Problems		Problem	10232	Status Change		11/17/2018 8:28 PM		[Not Tracked]		[Not Tracked]	[Not Tracked]
	11	Problem	10231	Status Change		11/17/2018 8:28 PM		[Not Tracked]	Work in Progress	[Not Tracked]	[Not Tracked]
All Open Problems		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]
Changes Open Change Requests	20	Problem	10231	Status Change	11/17/2018 8:27 PM	11/17/2018 8:27 PM	1 0.01 [Not Tracked]	[Not Tracked]		[Not Tracked]	[Not Tracked]
CMDB Total Assets	69										
Reporting Incidents this Year	52										
Knowledge Articles	350										
See Additional Dashboards		•									Þ

Business	Object		Entry Type							
~ F	ïlter: Incident		<ul> <li>Filte</li> </ul>							
	Any									
4	Change Request	story Records								
Pa 🗹	Incident	Entry Type	Start Date/Time	End Date/Time 🔹	Duration in Hours	Previous Owner				
	Knowledge Article	Team Change		11/17/2018 9:05 PM	0.00	Cherwell Admin				
	Problem	Team Change	11/17/2018 8:56 PM	11/17/2018 8:57 PM						
Incid	ent 102376	Team Change	11/17/2018 8:56 PM	11/17/2018 8:56 PM	0.00					
Incid	ent 102376	Team Change	11/17/2018 8:56 PM	11/17/2018 8:56 PM	0.00					

# 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.