CUSTOMER APPROVALS MAPP

PRESENTED BY: STRATACOM

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WHAT THE MAPP INCLUDES AND DOES NOT INCLUDE

- Modifies the Approval Forms
- Uses the New Approval Forms as the Defaults for Approval, Incident, Knowledge and Change Management
- Provides a Dashboard for Configuring Approvals
- Contains a sample one-step to illustrate Service Request workflow
- Provides a Portal Dashboard to view Approvals
- Does not expose Portal Dashboard on your Portal
- Does not modify your Incident workflow
- Provides flexibility to add an Approval type of Approval Groups.
- Approval Group business object is not included in this mApp.

APPLYING THE CUSTOMER APPROVALS MAPP

The mApp may be applied to any system, however, it is recommended to apply this first to an out of box system (or a copy of your development system).

This mApp replaces the out of box Approval Default forms. If you have an existing Production Cherwell system, you may want to back up your Approval Business Object and Approval Forms.
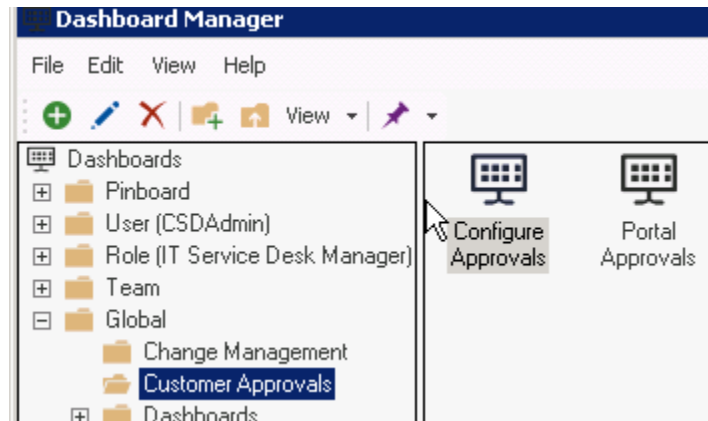
STEP BY STEP

- Apply mApp
- Click Agree to accept the terms
- Click Next through each of the Screens until you reach the Finish button
- Click Finish
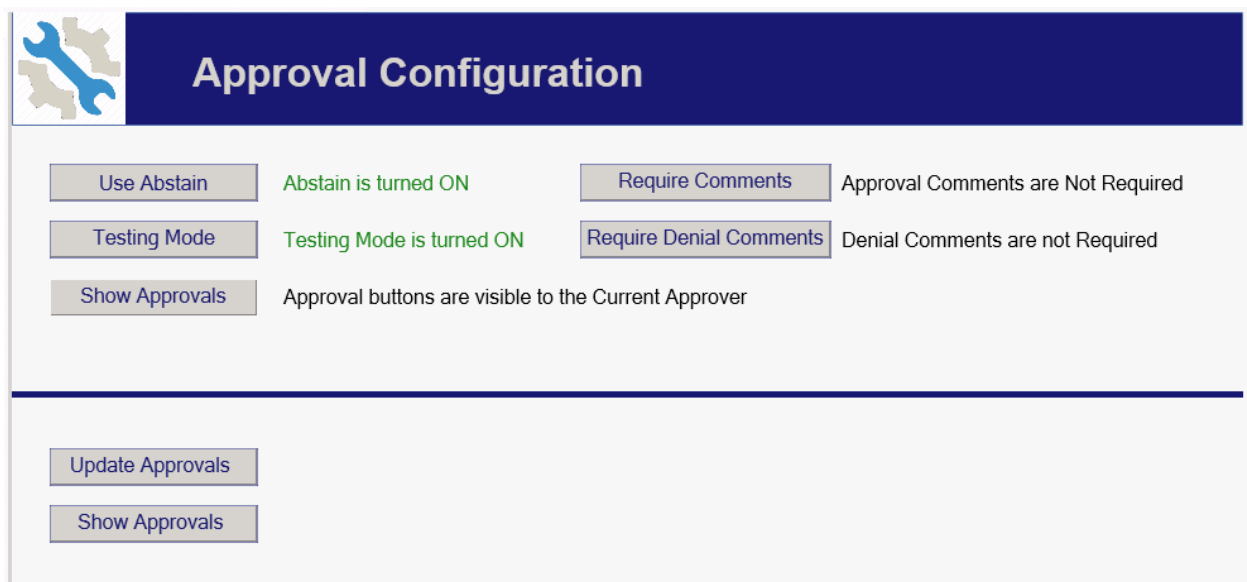- Publish blueprint (being sure to scan the blueprint)

USING THE CUSTOMER APPROVALS MAPP

Launch the Cherwell Client

- Select Dashboards➔ Dashboard Manager
- Navigate to Global➔Customer Approvals➔Configure Approvals

- The following dashboard appears:

This Dashboard allows you to configure your approvals. There are some Global system-wide stored values which manage the approval process.

- Use Abstain will allow you to globally turn on or off the Abstain button
- Testing mode allows you to override the email target of Approvals, even in Production
- Show Approvals will globally show all approval buttons to all users or hide them so that the buttons only show up for the current approver
- Require Comments toggles the ability to make comments required for all approvals or turn it off.
- Denial Comments toggles the ability to make comments required for all denials.
- Update Approvals will update all previously existing records to be compatible with the mApp (required update)

- Show Approvals is a quick way to see all of the Approvals in the system

UPDATE THE PREVIOUS APPROVALS

- Select **Update Approvals** from the Configuration dashboard. This button will update all previous approvals in your system to the new format. It does the following:
  - Sets the Approval Type to User
  - Copies the Approval Name to the User Approval Name field
  - Copies the Approval ID to the User Approval ID field

IMPORTANT NOTE: IF YOU HAVE PREVIOUSLY USED CUSTOMER APPROVALS, YOU MAY NOT WANT TO USE THIS ONE-STEP AS IS. THIS WILL UPDATE ALL PRIOR APPROVALS ASSUMING THAT THEY ARE USERS, BASED ON AN OUT OF BOX SYSTEM.

UPDATE SECURITY

If you are planning to use this for Customer Approvals, you have to perform a few Security updates. On both the Portal Customer and Portal Workgroup Manager security groups, make sure to allow the Portal user to View and Edit the Approval Business object. Scroll down and make certain that the user is able to edit individual fields too.

DEMO THE APPROVAL PROCESS

These instructions are based on an out of box Cherwell system. If your Cherwell system is substantially different than out of box, you may need to modify these instructions to match your system.

- Search on All Change Requests in your Cherwell system
- Click on Show All Tabs
- Navigate to the **Approval** tab
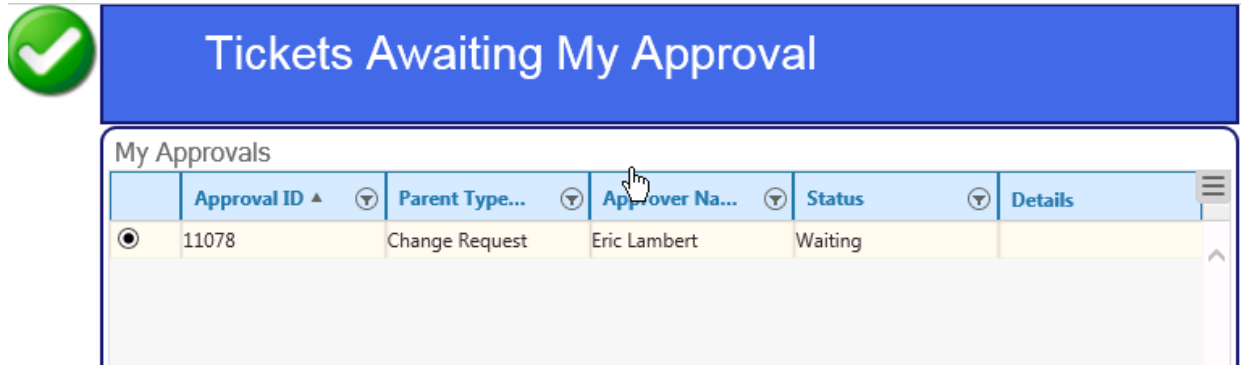- Click **New Approval**

The following screen is displayed:

- Approval type is preset to user
- Click the button to the right of the approver field to reveal the list of Users (this is based off the Approval type)
- Change the Approval type to Customer
- Click the button to the right of the approver field to reveal the list of Customers (this is based off the Approval type)
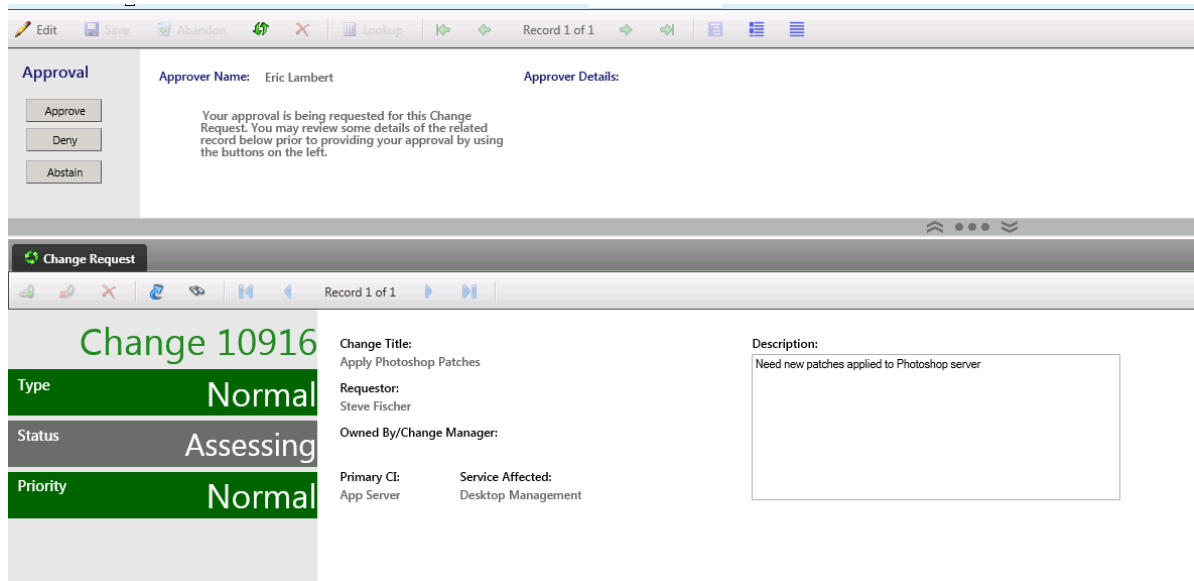
DEMO PORTAL APPROVALS BY CUSTOMER

You will need to add a button to your portal to display the Portal Approvals dashboard. Then, perform the following steps:

- Create Approval for Eric Lambert
- Log on to portal as Eric
- Click on button to display Portal Approvals
- The following dashboard is displayed

- Click on the Approval and the Approval screen is displayed

The portal user can click on approver and the portal ticket will be approved.

IMPLEMENTING CUSTOMER/ADVANCED APPROVALS (NEXT STEPS)

Because no one's Cherwell system is identical, these steps can be documented, but cannot be part of the mApp. My approvals will not be the same as your approvals. This mApp ships with a sample one-step that can be customized and used in your own workflows.

The one-step is titled **Create Approvals for Service Request** and may be found in the Customer Approvals folder under Association Incident.
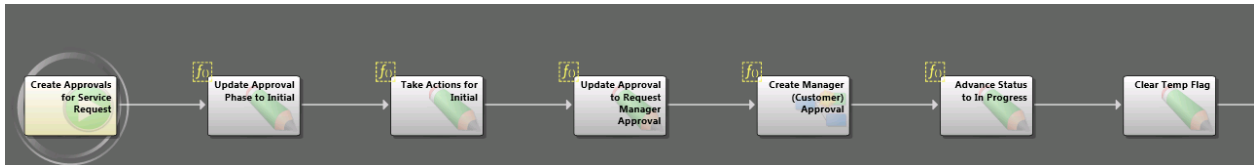
This illustrates the workflow of a ticket. Two new fields have been added to Incident, Approval Phase and tempApprovalPhaseSet (not a Stored DB value)

Since this is a new ticket, the first time through, the Approval Phase will be empty which will trigger the first box. It will update the Approval Phase to initial and set the tempApprovalPhaseSet flag to true. For illustration purposes, we assumed that something on the ticket would be done at this point. The flag is always cleared at the end of this one-step.

The next time through, it's time for us to send this ticket to the Manager on the ticket. The Requester is a customer, and so is his manager, so this is a perfect example of using the customer Approvals. We set the Approval Phase to Manager Approval and create our approval record.

After the approval has been received, this ticket will advance to In Progress status.

This one-step could be called as an action on a Service Request or initiated through your enhanced Incident Subcategory.

QUICK TIPS

USE THE EXPRESSIONS TO SELECT CUSTOMER DATA

One of the most under-utilized features of Cherwell is the expressions to pull customer data. Without extra relationships or auto populates, you can pull information about a user as long as you know the customer ID.

For example, you can retrieve the email like this:

Or, you can retrieve the Manager of the Customer like this:

Thank You for choosing the StrataCom Customer Approvals mApp. We hope you find it adds value to your Cherwell solution. If you need additional training or support for this mApp please contact Laura Walker at lwalker@stratacominc.com