News Object mApp

DATA SYSTEMS

Overview:

The News Object mApp provides functionality to add a News Widget to your default portal to keep your customers up-todate on any major News item or Problem. It also allows you to set an expiration date on the news item as well as renew it before it expires if the issue is still causing a major problem.

How the mApp Works

Download the mApp from the Cherwell mApp Exchange. Use the Apply mApp wizard to apply the mApp to your CSM system. The Apply mApp wizard generates a Blueprint, which can then be viewed and published to a test or Live system to commit the changes.

After the mApp is applied, Users will need to create a new blueprint to apply the News Widget to any dashboard to keep customers informed of important news. Add the News Widget to a dashboard by clicking **Create New Blueprint>Managers>Dashboards>Dashboard Manager** in CSM Administrator.

The mApp includes the following items:

mApp Item	Item Type	Item Parent	Merge Action	Target Item
Incident	Business Object		Merge	Incident
Show on Portal	Field	Incident	Import	New
News Object Link	Form	Incident	Import	New
Incident Owns News	Relationship	Incident	Import	New
News	Business Object		Import	New
Body	Field	News	Import	New
Created By	Field	News	Import	New
Created By ID	Field	News	Import	New
Created Date Time	Field	News	Import	New
End Date Time	Field	News	Import	New
General News	Field	News	Import	New
Last Modified By	Field	News	Import	New
Last Modified By ID	Field	News	Import	New
Last Modified Date Time	Field	News	Import	New
LastModTimeStamp	Field	News	Import	New
Major Incident News	Field	News	Import	New
News ID	Field	News	Import	New
Parent RecID	Field	News	Import	New
Parent Record Type	Field	News	Import	New
Problem News	Field	News	Import	New
RecID	Field	News	Import	New
Start Date Time	Field	News	Import	New
Title	Field	News	Import	New
News	Form arrangement	News	Import	New

News	Form	News	Import	New
News	Grid	News	Import	New
News_NewsID	Index	News	Import	New
PK_News	Index	News	Import	New
News Actions	Mergeable Area	News	Overwrite	
News Links Incident	Relationship	News	Import	New
News Links Problem	Relationship	News	Import	New
News Owns Journals	Relationship	News	Import	New
Problem	Business Object		Merge	Problem
News Object Problem Link	Form	Problem	Import	New
Problem Owns News	Relationship	Problem	Import	New
News ID	Counter		Import	New
Portal Default	Custom view		Don't change	Portal Default
Incident	Business Object	Portal Default	Merge	Incident
Show on Portal	Field	Incident	Import	New
News	Business Object	Portal Default	Import	New
Body	Field	News	Import	New
Created By	Field	News	Import	New
Created By ID	Field	News	Import	New
Created Date Time	Field	News	Import	New
End Date Time	Field	News	Import	New
General News	Field	News	Import	New
Last Modified By	Field	News	Import	New
Last Modified By ID	Field	News	Import	New
Last Modified Date Time	Field	News	Import	New
LastModTimeStamp	Field	News	Import	New
Major Incident News	Field	News	Import	New
News ID	Field	News	Import	New
Parent RecID	Field	News	Import	New
Parent Record Type	Field	News	Import	New
Problem News	Field	News	Import	New
RecID	Field	News	Import	New
Start Date Time	Field	News	Import	New
Title	Field	News	Import	New
News	Form arrangement	News	Import	New
News	Form	News	Import	New
News	Grid	News	Import	New
News_NewsID	Index	News	Import	New
PK_News	Index	News	Import	New
News Actions	Mergeable Area	News	Overwrite	
News Links Incident	Relationship	News	Import	New
News Links Problem	Relationship	News	Import	New
News Owns Journals	Relationship	News	Import	New
Problem	Business Object	Portal Default	Merge	Problem

Portal Default with News Object	Dashboard	Import	New
Create New General News	One-Step	Import	New
Create News Object	One-Step	Import	New
Create Portal Problem News	One-Step	Import	New
Create/Expire/Renew Portal News	One-Step	Import	New
Create/Renew/Expire News	One-Step	Import	New
Expire News	One-Step	Import	New
Expire Portal News	One-Step	Import	New
Go to Incident Record	One-Step	Import	New
Go to Problem Record	One-Step	Import	New
Go to Related Record	One-Step	Import	New
Renew News	One-Step	Import	New
Renew Portal News	One-Step	Import	New
Member of IT Management Team	Stored expression	Import	New
Required Filed Border Color	Stored expression	Import	New
Active News for Major Incident	Search	Import	New
Active News for Problem	Search	Import	New
All Open, Major Incidents with News	Search	Import	New
All Top Issues - With Unexpired News	Search	Import	New
Open Problems with News	Search	Import	New
Problems set as Top Issues - With Unexpired News	Search	Import	New
IT Management Team	Stored value	Import	New
News for Major Incidents	Widget	Import	New
News for Problems	Widget	Import	New
Open Major Incidents with News	Widget	Import	New
Open Problems with News	Widget	Import	New

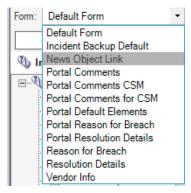
Steps to Apply the mApp:

- 1. Download the mApp.
- 2. Apply the mApp using the Apply mApp wizard in CSM Administrator.

After applying the mApp, following the basic configuration steps below:

In the CSM Administrator click Create a New Blueprint>Incident>Edit form

Click the Form drop down box and you will see the new form created 'News Object Link'; select this form.



On this form you will see the Priority field, Major Incident checkbox, Impact and Urgency fields from the default Incident form. You will also see the '*Publish News to Portal* link. Select the link and then copy this to your default Incident form and place appropriately for your work flow.



Once you have placed the 'Publish News to Portal' link on your Incident default form, select it and view the Expression.

9	Cherwell Service Management Administ	rator - 20170227_1115_UpdatesAfterNewsObjectmApp Blueprint - Cherwell2 connect
File View Edit	Managers Tools Form Help	
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Form default		· m · # ·
	Custom Expression	
Expression		
Form: Default For	Editor: Text	
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Incident fields		
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Call So	Custom expression	Call Source:
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Closed		
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Comme	C 2002	
Created	Cases: [if Incident.Show on Portal equals True and News.End Date Time is less than CurrentDateTime() then N	fy Search Classifications:
📄 Created	If Incident.Show on Portal equals True and News.End Date Time is greater than CurrentDateTime() the Default: Publish News to Portal	Priority:
Custom		View Related KB Articles
Custom Custom Default		Primary CI.
📄 Descrip		v
Descrip C Inciden Inciden	$[f_{()}]$ If condition is	
Last Mo		Select an Available Service Catalog Template
🕑 Level 2	O Simple Advanced Named expression	✓
Evel 2 🕑 Level 3	Advanced Expression: Custom expression Edit	
< III		
	Then region this	
	Then assign this	
	Value: News Expired - Renew Value is a color	
🖉 Button		
Ellipse		
GroupE		
abc Label		
Line	OK Cancel	
2 link la		

You will see how the wording on the Link changes based on each case in the expression. Make any changes necessary for your Incident work flow. Click OK on the Custom Case Expression, Click OK on the Custom Text Expression.



Save your blueprint.

Right-click on the 'Publish News to Portal' link and choose Control properties...



Click on the One-Step action 'Create/Renew/Expire News' to review.

0	Choose Action X			
	Action			
<u>A</u> ction:	Create/Renew/Expire News			
 Don't disable control just because form is disabled Show Progress 				
	OK Cancel			

Make any appropriate changes for your Incident work flow. Ensure to review each action condition as well. Click OK once done.

Create/Renew/ Expire News	Expire News Edit Expire News Action condition	$ \xrightarrow{\text{Create News}} \longrightarrow $
	Only run action Expire News if condition is true Expression: Incident.Show on Portal equals T v Jr.	Custom Expression
Step Details for Expire News : Name: Expire News One-step: I Renew News Based on scope and value: Global	~ Е	Grouping All of the items in the group must be true At least one of the items in the group must be true Simple
Number of times to run: 1		



With the 'Publish News to Portal' link still selected, click on the visibility button and review the custom expression. The link is currently only visible to members of the IT Management Team. Please make any updates as necessary, then click OK.

0	Custom Expression X			
Name: Custom expression				
Logical Expression			_	
<u>V</u> alue:	Operator: Value:			
[fo] Member of IT Manage ▼	Equals - True	×		
Advanced 🗸				
	[OK Cance	4	

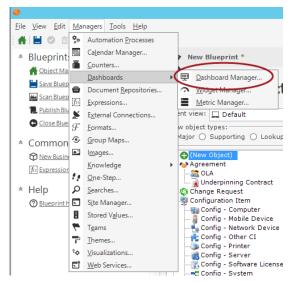
With the 'Publish News to Portal' link still selected, click on the disability button 🛇 - and review the custom expression. The link is currently only available to members of the IT Management Team. Please make any updates as necessary, then click OK.

0	Custom Expression	on	x
Name: Custom expression			
Logical Expression			
<u>V</u> alue:	Operator: \	/alue:	
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Advanced 🗸		OK Can	cel



Save your blueprint.

In the CSM Administrator click Managers>Dashboards>Dashboard Manager



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New Folder Cu<u>t</u>

<u>С</u>ору

Ren<u>a</u>me P<u>i</u>nning

Add To Blueprint Re<u>f</u>resh Find dependencies...

Ctrl+X

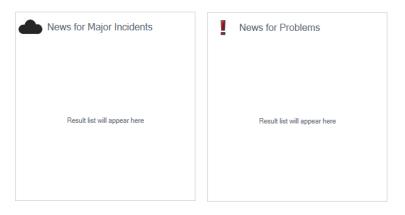
Ctrl+C

►

Open the 'Portal Default with News Object' Dashboard located here: /Global/Portal/ by right clicking on the dashboard and choosing edit.

	Dashboard Manager		_ D X
File Edit View Help	•	Search	- Go
Image: Supplier Dashboards Image: Supplier Dashboards Image: Supplier Dashboards Image: Supplier Dashboards	Name Department Items Executive Items Frequently Asked Questions Knowledge Articles My Devices My Items My Service Cart My Service Orders Portal (not logged in) Portal Default Portal Default Service Catalog Status and Problems	Order histo	n I Service Requests th ry and status of curre
Items in this folder are available to all use	ers of the system.		Close
Portal Default with News Object Portal Default with News Object Portal Default with News Object Service Catalog Status and Problems <u>Edit</u>			

Both the 'News for Major Incidents' and 'News for Problems' Widgets are on this dashboard. Please copy and paste them into your current Dashboard(s) where appropriate for your work flow.



Right click on each widget and choose 'Widget Properties...'

•		
	News for Maj	or Incidents
•		e ⊷31-
	Result list w 🌢	Background color
	A	
	\$	Anchoring •
		Style 🕨
		Glossy
	2	Border color
	3D	Border Style
	1	Bring-to-front
•	×	Send-to-back
		Position Ctrl+Shift+P
	<u>。</u>	Widget properties

Review the Widget Properties and make any necessary changes; i.e. the Search Criteria as appropriate. Click OK when done.

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News fo	or Major Incidents	<u>T</u> ype:	A Search Res	ults List	Ŧ	
Search Re	seulte Liet					
Default title:	News for Major Incidents]		
Business object:	Wews for major incidents		•	Show all		
Display] 🗠		
O Show results	s in a grid					
Custom	grid: (default)		Ŧ			
Default to	o showing grouping					
	er to show/hide grouping options					
 Allow dri Show results 						
Limit results						
- Search criteria						
	News for Major Incident 🛛 🔍					
Date Range						
Range Ar	ny time	•	New			
O User selecta	ible					
Field used for dat	te range: Created Date Time		•			
Refresh every	y 5 🔷 Minute 🔹					
Info					ОК	Cancel

Ensure to review the News for Problems widget properties as well if necessary and click OK when done.



Save your blueprint. Publish your blueprint.

In the CSM Administrator ensure the UserID you will log into the Rich client with to create a test record is a member of the IT Management Team (or whichever team you gave visibility/disability rights to on the News Link on the Incident form).

Create a Test Record:

In the Rich Client, Reload Definitions; Create a new Incident Record, ensuring you fill in the required fields. Click the 'Publish News to Portal' link and you will be prompted for additional information.

Incident 102291	Record Classify Investigate Resolve	Close
Status New	Step 1: Record the Details	Last Edited by
Priority 2	Short Description: Pinter not functioning in Patient Surgery Center Description: The printer in the Patient Surgery Center is not functioning.	Call Sources Phone V
Requestor: Alternate Contact Info Image: Contact Info Image: Contact Info		
Owned By: <u>Assign To</u>	Step 2: Classify	(clear classifications).
- select owner - Ist Level Support	Service: Printing View Related KB Articles Category: Network V	Priority: Major Inclient Impact: Department 2 V Publish News to Perial Primary CI:
SLA: More Info	Subcategory: Submit Incident V	
Gold (Customer SLA) Respond By: 2/15/2017 4:49 PM Resolve By: 2/16/2017 12:19 AM	Step 3: Investigate the Incident Printer	
I Want To:	1st. Call Resolution:	
Take Ownership Escalate to Level 2 View Detailed Date/Time Information Link to Existing Major Incident	Is the Power On? Any Loose Cables? Is it Online? Is it Online?	

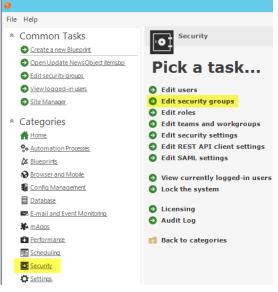
Save the Incident. You will now see the 'Publish News to Portal' link say 'Expire News'.

Incident 102291	Record Classify	Investigate	Resolve	Close		
Status New	Step 1: Record the I	Details			Last Ed	ited 2/15/2017 4:38 PM by Teri Flicek
Next: Begin Work	Short Description:			Call Sc	ource:	
Priority	Printer not functioning in Patient	t Surgery Center		Phone	1	~
Priority 2	Description:					
Requestor: Alternate Contact Info	The printer in the Patient Surge	ry Center is not functioning.	*			
Owned By: Assign To	Step 2: Classify					(clear classifications)
- select owner - ist Level Support	Service: Printing Category: Network	View Related	I KB Articles	Priorit 2 Prima	Expire News	Impact: Department Urgency: High ह्य
	Subcategory:					
Gold	Submit Incident		¥			
(Customer SLA) Respond By: 2/15/2017 4:49 PM	Step 3: Investigate the Incident					
Resolve By: 2/16/2017 12:19 AM	Printer					
	1st. Call Resolution:					
Take Ownership	Is the Power On?	Out of Paper?				
Escalate to Level 2	Any Loose Cables?	Paper Jam?				
View Detailed Date/Time Information	Is it Online?	Toner Low?				
Link to Existing Major Incident		[] Toner Low?				
Submit to Knowledge Base						

Log into your portal and check the dashboard you added the new News Incident Widget to. If you do not see the News items you added, double check your security in CSM Administration.

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River T		
Home	Image: Solution of the second status in	News for Major Incidents INTERNET DOWN - Alumni Building The Network Team is aware the Internet is down in the Alumni Building and is diligently working to restore service. Printer Down Printer in the Patient Surgery Center is not functioning. The Support Team is diligently working on this issue.
Twitter Feed - @Cherwell_CSM	Discussions East Modified 12/2/2015 @ 2:30 PM Does anyone want to carpool to next week's conference? Image: Conference? Image: Douts! Last Modified 11/18/2015 @ 4:42 PM There are donuts in the conference room; get them while they last! Image: Streaky printouts Last Modified 11/18/2015 @ 4:48 PM Anyone else having trouble with the upstairs printer? I am.	News for Problems

In CSM Administration, click on 'Security' on the left nav menu, then click Edit security groups



Click the drop down by Group and choose *Portal Customer*. Click on the Business Objects tab, then on the Business Object drop down choose News. Ensure to check the View checkbox to allow Portal Customers the rights to view the News object.

0	Security Groups 📃 🗖 🗙
File Options Help	I Customer
Info Rights Business Objects File Attac	chments Roles
Business Object: News Prove	General ✓ View Add Edit Delete Limit records based on criteria Browse Encrypted Fields ✓ View Edit File Attachments ✓ View Add Edit ✓ View Add Edit
Start Date Time	Different rights based on requester
These are the rights that will be assigned to t	

Then click on the New Field under News and ensure to check the View checkbox here as well:

Security Groups	D X
File Options Help	
Info Rights Business Objects File Attachments Roles Business Object: General News ✓ View Edit ✓ News ✓ Created By ☐ Created By ID Created Date Time	
Created Date Time End Date Time C General News Last Modified By Last Modified By Last Modified Date Time LastModTimeStamp C Major Incident News News ID Parent RecID Parent RecID RecID RecID RecID RecID Start Date Time	
Title Different rights based on requester These are the rights that will automatically be assigned to new News fields until you set them using Security Groups.	