# Cherwell Service Management

Observer mApp presented by Excalibur Data Systems

# Contents

# Observer mApp

## Overview

The Observer mergeable application (mApp) provides the ability for a technician (user) to add or remove themselves as an Observer on an Incident, Service Request, Problem or Change record.

Dashboard widgets have been made available so that a technician can easily drill down to see which records they are observing.

If desired, additional configuration can be done to allow a user to view, link and unlink records to their User profile by running the My Profile search in Search Manager.

The mApp capability can be extended by setting up automation process to notify an Observer if a record has been modified in some fashion if desired or expand use to other objects such as Projects, Releases, etc.
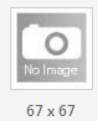
## How the mApp Works

Use the Apply mApp wizard to apply the mApp to your development system, where the mApp can then be viewed and published. After evaluating and testing the mApp again the development system, apply it to your production system.

The mApp includes the following items:

| mApp Item | Type | Typical Merge Action |
|---|---|---|
| User Info | Relationships:<br><br>*Userinfo Links Change Requests*<br>*Userinfo Links Problems*<br>*Userinfo Links Incidents* | Import |
| Incident | Relationships:<br><br>*Incident Links Observer* | Import |
| | Form Arrangement | Overwrite |
| | One Steps: | Import |

| | | |
|---|---|---|
| | *Add me as an Observer*<br>*Remove me as an Observer* | |
| | Searches:<br><br>*Open Incidents/Requests I am Observing* | Import |
| | Widgets:<br><br>*Open Incidents I am Observing* | Import |
| Problem | Relationships:<br><br>*Problem Links Observer* | Import |
| | Form Arrangement | Overwrite |
| | One Steps:<br><br>*Add me as an Observer*<br>*Remove me as an Observer* | Import |
| | Searches:<br><br>*Open Problems I am Observing* | Import |
| | Widgets:<br><br>*Open Problems I am Observing* | Import |
| Change Requests | Relationships:<br><br>*Change Requests Links Observer* | Import |
| | Form Arrangement | Overwrite |
| | One Steps:<br><br>*Add me as an Observer*<br>*Remove me as an Observer* | Import |
| | Searches:<br><br>*Open Changes I am Observing* | Import |
| | Widgets:<br><br>*Open Changes I am Observing* | Import |

## Steps to apply the mApp

To apply the mApp, perform the following high-level steps:

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

## Additional steps to configure the mApp

In the event you wish to expose the UserInfo object so that a technician can view records for which they are an observer and link and unlick from their profile the following steps will need to be made:

3. Create a new blueprint
4. Edit the **UserInfo Business Properties**

5. Set *Object type* to *Majo*r, and select *Show in Search Manager*
6. Click *Home*
7. Select the *Form Arrangement*
8. Drag the three observer relationships onto the form arrangement then remove the *Add* and *Edit* options from the toolbar
9. Edit the *UserInfo Business Properties*
10. Set *Object type* to *Supporting*
11. Publish the blueprint

Additionally you will need to add the widgets to the appropriate dashboard and add one-steps to the *I Want To section* labelled Make me an Observer and Remove me as an Observer.  Visibility expressions should be set on these one-steps to control when they can be click (i.e. you are not able to see the Remove option if your name is not listed in the Observer tab).

## How to mApp

To add yourself as an observer on a record you can run the *My Profile* search under the *UserInfo* object association to view your profile.  Once your profile displays, click on the appropriate tab and select the *link* button.  To remove yourself click the *unlink* button.

**User Details**

Full Name:
Cherwell Admin

Department:

Office:

E-Mail:

Phone:

Cell Phone:

Fax Number:
( )  -  x

No Image
67 x 67
Set Image

**Additional Information**

Manager:

Manager  E-Mail:

Availability:

Time-off Start:          Time-off End:

Comments:

| Incidents I am Observing | Problems I Am Observing | Change Requests I Am Observing |

Record 1 of 3    View ▾

| Type | Owned By Team | ID | Customer Name | Created Date Time | Status |
|------|---------------|-----|---------------|-------------------|--------|
| Incident | 3rd Level Support | 101330 | Bruce Robertson | 10/24/2016 2:32 PM | Assigned |
| Incident | 2nd Level Support | 102013 | Susan O'Connor | 10/23/2016 5:53 PM | Resolved |
| Incident | 2nd Level Support | 102026 | Jamie Young | 10/31/2016 1:27 PM | Assigned |

Within an Incident/Service Request, Problem or Change click the **_Make me an Observer_** link under the **_I Want To_** section of the form or click the **_link_** button on the **_Observer Tab_** toolbar.  To remove yourself click the **_Remove me as an Observer_** under the **_I Want To section_** or click the **_unlink_** button on the **_Observer Tab_** toolbar.

To view a list of the records you can either pull up your profile or view them on a Dashboard using the widgets included in the mApp.