



Cherwell Service Management

Observer mApp presented by Excalibur Data Systems

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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.

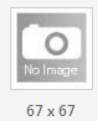
The screenshot displays the Observer mApp interface for Incident 102026. The interface is divided into several sections:

- Header:** Incident 102026, Status: Assigned, Priority: 3.
- Requestor:** Jamie Young, Jamie.Young@RiverTCorp.com, (719) 386.7000.
- Owned By:** Henri Bryce, 2nd Level Support, 833-898-8787, henri.bryce@RiverTCorp.com.
- SLA:** Desktop Management (Service SLA), Respond By: 11/1/2016 10:28 AM, Resolve By: 11/3/2016 10:28 AM.
- I Want To:** Take Ownership, Escalate to Level 3, View Detailed Date/Time Information, Link to Existing Major Incident, Submit to Knowledge Base, Track Time.
- Record Details:** Short Description: Photoshop Issue, Call Source: Email, Description: Photoshop is not working.
- Step 2: Classify:** Service: Desktop Management, Category: Misc. Software, Subcategory: Submit Incident, Priority: 3, Major Incident: [checked], Impact: Individual, Urgency: High, Primary CI: jamie-desk.
- Step 3: Investigate the Incident:** Additional Details: This requires a Standard Change.
- Navigation:** Record, Classify, Investigate (selected), Resolve, Close.
- Footer:** Service Catalog Templates, Journals, Observers, Tasks, Similar Incidents, Jamie's Open Incidents, Last 30 Days, Configuration Items, SLM History, Reason for Breach, Change Request, Problem.

At the bottom left, a dark box displays the following statistics:

- Incidents/Requests I Am Observing: 3
- Problems I Am Observing: 3
- Changes I Am Observing: 4

User Details

 <input type="button" value="Set Image"/>	Full Name:	<input type="text" value="Cherwell Admin"/>
	Department:	<input type="text"/>
	Office:	<input type="text"/>
E-Mail:		<input type="text"/>
Phone:		<input type="text"/>
Cell Phone:		<input type="text"/>
Fax Number:		<input type="text" value="() - x"/>

Additional Information

Manager:	<input type="text"/>
Manager E-Mail:	<input type="text"/>
Availability:	<input type="text"/>
Time-off Start:	<input type="text"/>
Time-off End:	<input type="text"/>
Comments:	<input type="text"/>

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

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:	Import
	<i>Userinfo Links Change Requests</i>	
	<i>Userinfo Links Problems</i>	
Incident	Relationships:	Import
	<i>Incident Links Observer</i>	
	Form Arrangement	
	One Steps:	Import

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


 67 x 67
 Set Image

Full Name:

Department:

Office:

E-Mail:

Phone:

Cell Phone:

Fax Number:

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
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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.