Quick Call Template mApp (v2)

Overview

This map adds the ability to create Quick Call Templates for Incident that can be applied via a one-step. Using the templates will save time filling out tickets and will make it very easy to administer. Each template has a status life cycle so you can work on New templates without exposing them, and retire templates when they are no longer needed.

Each template has a variety of optional fields that when left blank will leave the equivalent fields in the ticket unchanged. You can include tasks with dependencies in your Quick Call Templates.

Now you can dynamically create table driven templates that fill out the desired fields in any incident quickly.

Major Changes/Additions

Quick Call Template:

1. Creates a new major object called Quick Call Template

Incident:

1. Four new fields will be added
2. Two new relationships will be added for Quick Call Template and Template Tasks
3. A new form will be added to Incident (Quick Call Template from mApp)
4. Look at the instructions on the new form to see how to add a pre-built link to the one-step that applies the Quick Call Templates
5. Adds "Apply Quick Call Template" to Incident Menu Actions
6. Adds "Apply Quick Call Template" to Incident Task Pane Actions

Task:

1. Two new fields will be added
2. Two new relationships will be added
3. A new tab will be added to the form arrangement to show the related Quick Call Template when the Task is a "template" Task
4. A new form will be added to Task (Quick Call Template from mApp)
5. Look at the instructions on the new form to see how to add pre-built banners to your task forms so they show if they are a template task

Configuration Item Group:

1. A new relationship from Quick Call Template to Configuration Item Group will be added

Requirements:

1. Cherwell 6.01 or newer is required to be able to apply this mApp successfully

You may want to add a filter to your existing Task searches to exclude tasks where "Template Task" is TRUE.

Version 2 Updates:

1. Increased several fields sizes to accommodate non-standard service catalog definitions
2. Set Template Name to use a unique index
3. Updated DB container name to sync with object name
4. Removed "Closed" as a selectable status option
5. Updated application one-step to call "Resolve Incident" one-step. **Please update to point to the appropriate one-step if you aren't using the OOTB one.**
6. Added field to the template that will fill in the requester with the current user's customer record.
7. Added warning to the template when a task is added that lets you know that the ticket must be able to be saved when the template is applied. If it can't be saved the tasks will fail to replicate properly to the ticket.

Incident

Copy the "Apply Quick Call Template" link from the "Quick Call Template from mApp" form. Paste the link on the "Default Form" of Incident and position as desired.
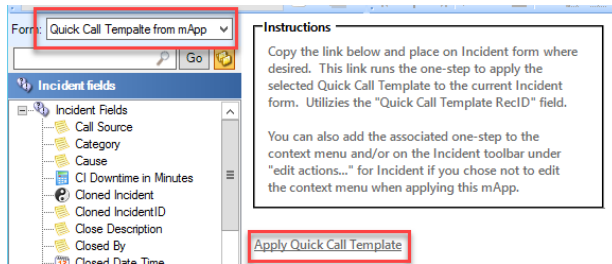
Here we have placed the link in the "I Want To:" section of the Incident form.
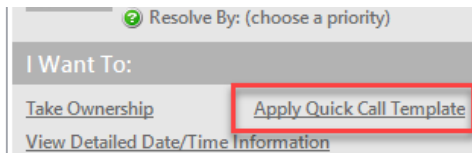
Task

There are two different warning banners to use depending on your particular Task forms. Copy each and paste on the appropriate Task forms as shown below. These two banners are positioned based on the OOTB content so them paste into safe areas be default.

Here we have placed the warning banner on the "Tab Form" form. This is the form that shows in the form arrangement tab of Incident.

Here we have placed the warning banner on the "Default Form" of Task.
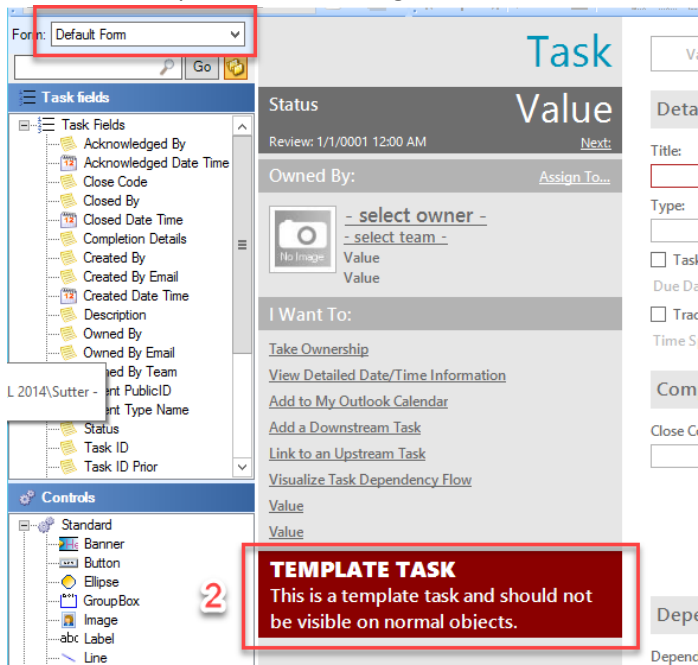
Creating New Quick Call Templates

Select "New Quick Call Template" from the toolbar to create your first template.

Fill out the form as appropriate. Any optional fields left blank will be ignored when the template is applied to an Incident. Be sure to select the correct "Priority Group" based the SLA for the selected Service.

Incident Quick Call Template 5

Template Details   *Last Edited 1/1/0001 12:00 AM by*

Template Name: Template Description:
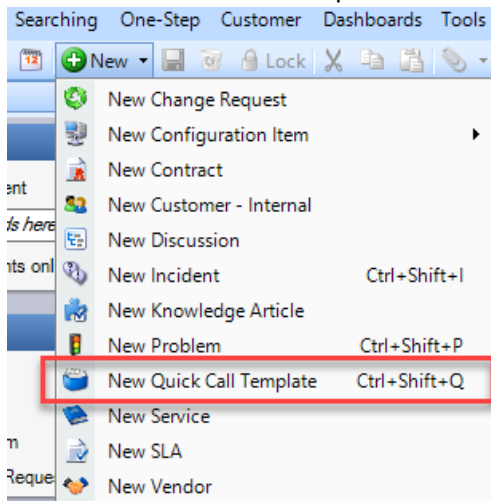
Template Status:
New

Ticket Details

Short Description: Description:

Call Source:

Status:

Ticket Classification   Search Classifications:

Service: Priority Group:
                                                     Standard

Category: Priority:
                                                     ☐ Major Incident   Impact:
                                                                         Urgency:

Subcategory: Primary CI:

Template Tasks (0)

New Task ✕ | ◄◄ ◄ No records ► ►► | ▼ ▼ | 🖨 | View ▼

Task ID ▲	Title	Owned By	Status	Description
There are no template tasks assigned yet.				

Note that you must change the Status to "Active" for your new Quick Call Template(s) to become available within Incident.

You may "Retire" templates as they become no longer necessary.

Searching

There are stored searches for Quick Call Templates and Incident.